

Client onboarding survey (cheatsheet)

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Introduction:

Whenever you sign up a new client you should have a list of client requirements that they need to complete before you can begin working with them. This not only helps you gather all the necessary information, it sets the stage right from day one so that the client understands this is a team effort and not just a one man show. The following instructions show you how to setup a basic client onboarding survey so that you can use one in your own consulting business:

Instructions:

1. Go to Google Drive in your browser. <https://drive.google.com>.
2. Click on: New >> More >> Google Forms to create a new form.
3. Name your new Google Form "Client onboarding survey".
4. A demo Client onboarding survey is [available here](#) for you to see/understand.
5. Write a brief description about your survey, why you need it etc. This will help your clients understand what this is and why they need to complete it. It will also motivate your clients to provide more thorough information which will in turn help you deliver a better service.
6. Now start creating the specific questions you want to ask your clients when they come onboard and start working with you. Start off with: Your first and last name, Company etc.
7. Now start creating the more detailed questions which will be specific to the niche/offer/result that you provide. Take the time to think about your offer and what information you need to know from your clients in order to deliver an amazing service.
8. You should use single-line response fields for simple questions and then multi-line response fields for more advanced questions where you want your client to provide a detailed response.
9. When you've finished creating your survey click the settings cog and then make sure the following box is unchecked: "Restrict to Your Company users". This is very important.
10. Congratulations, your survey is ready to use. Use the "Share" link to give it to new clients.