New Client Checklist

Complete the following.

		Client Start Date
		Coach Initials
Date	**Client Name**	**Client Title**

Client Company	
Street Address	**City/State/Zip+4**
Client Work #	**Client Cell #**
Client e-Mail Address	**Client Fax #**
Assistant Name	
Assistant Work #	**Assistant e-Mail Address**

Billing Information	
Billing Name (e.g., controller's name)	
Billing Address (e.g., ABC Corp)	
Billing City, State	**Billing Zip+4 Code (Important!)**
Billing Contact	**Billing Contact Phone**
Former Coach	

Folder General Information:	**Done**
1) **Checked inactive client files for old coaching folder and information!**	
2) **Folder Created**	

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Folder Coaching Information:	Done	Not Applicable
3) Copy of Coach Demo Info Form		
4) Copy of New Client Intake Form		
5) ACT! Account Created-CHECK 1ST IF ONE IS ALREADY STARTED!		
6) "TENTATIVE" Coaching Schedule Created in ACT!		
7) JumpStart Scheduled in ACT!		
8) JumpStart listed on Office PROGRAMS BOARD		
9) e-Mail or fax for client DISC evaluation forms sent		

Folder Agreement / Billing Information:	Done	Not Applicable
10) Copy of KH&Co. Coaching Agreement		
11) Copy of Purchase Order #		
12) Copy of Credit Card Authorization Form		
13) QuickBooks Account Created		
14) Client Added to Recurring Bills List		
15) First Invoice Created and Sent		

Other:	Done	Not Applicable
16) JumpStart Binder Created		

Additional Information: