ClearSkai TECHNOLOGIES

ONBOARDING · WELCOME

Client Welcome Form

New client intake form for project contacts, communication preferences, billing contact, launch priority, and next-step expectations.

SL-ON-01 · Version 6.0 · Issued November 20, 2026

Document	
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Library folder	Onboarding
Replaces	ClearSkai_Client_Welcome_Form_v5.pdf
Classification	Sales document library · client form

Prepared for

CLIENT NAME & COMPANY

PROJECT / BUILD NAME

CLIENT EMAIL

Get back to building where it matters most.

ONBOARDING

Client Welcome Form

Use this immediately after a client signs so the project starts cleanly.

COMPANY

PRIMARY CONTACT

PHONE

EMAIL

BILLING CONTACT

BILLING EMAIL

PROJECT / BUILD NAME

SELECTED PACKAGE

PREFERRED MEETING METHOD

PREFERRED UPDATE METHOD

WHAT WOULD MAKE THIS PROJECT A WIN?

URGENT NOTES / CONSTRAINTS

Signatures

CLIENT

SIGNATURE / TYPED NAME

PRINTED NAME / TITLE

DATE

CLEARSKAI PROJECT MANAGER

SIGNATURE / TYPED NAME

PRINTED NAME / TITLE

DATE