Client Onboarding Template

AI Workflow Project

Project Information

Client Name:	
Project Name:	
Start Date:	
Target Completion:	
Primary Contact:	
Email:	

Hosting Setup

Select hosting model:

- ☐ Client-hosted n8n Cloud
- ☐ Client self-hosted n8n
- ☐ Agency internal (client does not access n8n)

n8n Instance URL: _____
Developer Invited: ☐ Yes ☐ No

Required Integrations

Integration	Purpose	API Key	Connected
OpenAI		☐	☐
CRM (specify)		☐	☐
Calendar		☐	☐
Email		☐	☐
		☐	☐
		☐	☐

Sample Data Requirements

- ☐ Sample emails (5-10 examples)
- ☐ Support tickets/transcripts (5-10 examples)
- ☐ CRM records (sample contacts/deals)
- ☐ Other: _____

Data anonymization required: ☐ Yes ☐ No

Success Criteria

What defines a successful output?

_____
_____

What must NEVER happen?

_____

_____

Communication

Preferred communication channel: _____
Update frequency: ☐ Daily ☐ Weekly ☐ As needed
Scheduled check-in day/time: _____

Signatures

Client Representative: _____ Date: _____

Developer: _____ Date: _____