

Expectations Checklist



Use this checklist as a guide to clarify key expectations with clients during onboarding, so you have a shared understanding of training goals, scheduling, billing, and communication preferences.

DISCUSSION ITEMS

- ☐ Training goals for the horse and rider
- ☐ Scheduling preferences (days and times)
- ☐ Cancellation & rescheduling policies
- ☐ Payment terms & process
- ☐ Communication preferences
- ☐ Client responsibilities
- ☐ Safety and horse care guidelines
- ☐ Vet & farrier info & schedule
- ☐ Progress tracking and feedback
- ☐ Dress code & rack requirements
- ☐ Emergency procedures

RIDER GOALS

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
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- ☐ _____
- ☐ _____

NOTES

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From scheduling to billing, we've got everything you need to
keep your business on the right track. Give it a try today. 🐾

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