Client Onboarding Workflow Pack

Sample structure and presentation style for the finished deliverable. Not tied to a real client.

DELIVERABLE TYPE	BEST FOR	INCLUDES
Workflow documentation pack	Agencies, consultants, service businesses	SOP, checklist, kickoff flow, handoff notes

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Workflow objective

Move from signed client to clean kickoff without missed steps, unclear ownership, or scattered communication.

Core workflow pages

This sample shows the structure a client would receive in a finished workflow pack.

Client onboarding SOP

Trigger
Signed agreement and payment confirmation received.

Primary owner
Account owner or founder.

Steps

1. Send welcome email within one business day.

2. Create client folder using standard naming convention.

3. Send intake request and required materials list.

4. Schedule kickoff call or confirm async kickoff path.

5. Confirm next action owner after kickoff.

Internal checklist

✓ Signed agreement received

✓ Invoice/payment confirmed

✓ Welcome email sent

✓ Client folder created

✓ Intake request sent

✓ Kickoff scheduled

✓ Owner for next phase assigned

Completion state

Client has welcome message and next steps, required materials have been requested, kickoff is scheduled or complete, and the next owner is confirmed.

Supporting notes and edge handling

These sections make the workflow easier to follow when onboarding does not go exactly to plan.

Kickoff sequence

1. Confirm agenda and attendees.
2. Review goals, scope, and timeline.
3. Confirm materials still outstanding.
4. Restate next steps, owners, and deadlines.

Handoff notes

After kickoff, ownership moves from the onboarding owner to the delivery owner. The handoff note should include current status, missing items, known risks, and the next required action.

Observed gaps and risks

- No standard rule for incomplete intake submissions.
- Folder naming conventions are implied, not documented.
- The handoff point between onboarding and delivery is not clearly owned.