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**SOP MASTER - Client Onboarding- Systems Vault**

**PREREQUISITES**

[Project Management Tool- Teamwork](http://sarahnoked.com/teamwork)

[Master: Client Details- Systems Vault](https://docs.google.com/spreadsheets/d/1jHG9MEvCmCceeMhdQoOiuUFtzoz0OX240_Fw3Km_i98/edit?usp=sharing)

[SOP- Project & Task Management- Systems Vault](https://docs.google.com/document/d/1c7REsC8MsWBBDmtKR6bpULsGVNPt-JGtC7Xwjx9xThg/edit)

[SOP- Creating and Keeping Client Briefs Current - Systems Vault](https://docs.google.com/document/d/1ptPCYC4plL4lOFK4vNKlakm7XWJL-66yrreQxpcTqog/edit?usp=sharing)  
[SOP- Creating Retainer Tracking Project- Systems Vault](https://docs.google.com/document/d/1O4OVDkh0zzKegmpe7wn3KKfJZ_2Ijwgl1IdGRpG-ay4/edit?usp=sharing)

[SOP- Updating SN Master Documents While Onboarding Clients - Systems Vault](https://docs.google.com/document/d/16enClMiyPauAZOLdOmNllKyIl9rjMAgkG-99OaHvB6o/edit?usp=sharing)

[SOP- Setting up a Client Channel- Systems Vault](https://docs.google.com/document/d/1L6yVCrnSRMURcwvw3T2q0KsRzDHyK3Lk675WZ6GL8T8/edit?usp=sharing)

[SOP- Creating Client Project in PM Tool- Systems Vault](https://docs.google.com/document/d/1zgwJowz3OibYsEQt2Zb-whHvK8SZWeec9wAMtXQSUZc/edit?usp=sharing)

[SOP- Setting up Cloud Storage- Systems Vault](https://docs.google.com/document/d/1UAp3UiMq1ys07G9H3V6rCgivbVC2XNis8d5chq4PFJ0/edit?usp=sharing)

[SOP- Setting Up Clients in Google Analytics - Systems Vault](https://docs.google.com/document/d/1QO1MnSrzShDW3k_9eJQWCW_O1PuPccOpkq8KrR-1L-s/edit?usp=sharing)

[SOP- BOD/EOD Reporting- Systems Vault](https://docs.google.com/document/d/1D1XVRY1S9TtENTw2pLSjdbHuQXptsuNsBkrhi_J_-Mw/edit)

[Template: OBM Introduction to New Client - Systems Vault](https://docs.google.com/document/d/1PLMLjFAzN-oolRy0U6XytkmQn23qeOInQZbBq1QaolQ/edit?usp=sharing)

[Template: Getting Started With Your Projects and Tasks](https://docs.google.com/document/d/1HHf-w8GaZZ9KYr4Z0MufuwCY-qF_qLX5bcZht_zGCWw/edit?usp=sharing)

**PURPOSE**

To ensure new clients are onboarded swiftly, warmly, and they feel that our team is going the extra mile to make their transition to working with an OBM as effortless as possible. When clients make the financial transaction and start to work with us we want to do everything we can to encourage trust and a great working relationship.

**POLICY**

**This process starts when the client has signed their contract and paid their invoice.**

Clients must be fully paid and contract signed prior to onboarding.

We track time as internal for our onboarding tasks.

**PARTY**

Online Business Manager

**PROPERTY**

Online Business Manager

**PROCESS**

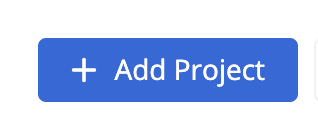
Part 1: Welcome

Part 2: Housekeeping

Part 3: Ongoing

**PROCEDURE**

**Part 1: Welcome**

1. From the main dashboard in Teamwork PM navigate to 
2. Give the project a name using our naming conventions and assign to our company
3. Assign all necessary team members who will be working on the project
4. From the new project created navigate to More > Settings > Integrations and toggle on Google Drive and Harvest
5. Set up and assign responsibilities and due dates to the “Welcome + Onboarding” task list in [Teamwork PM](http://sarahnoked.com/teamwork) to the client project created in part 1. Refer to [SOP- Task Management- Sarah Noked OBM](https://docs.google.com/document/d/1rCk4Xx1nm4Ue6etO7dTB0tkDSU-_KwY5xMTCXrhGJLc/edit?usp=sharing) and navigate to the section ‘Creating a task list from a template’.

Note: Save the new task list to the client project

This task list includes:

1. Send introductory email with the [Template: OBM Introduction to New Client - Systems Vault](https://docs.google.com/document/d/1PLMLjFAzN-oolRy0U6XytkmQn23qeOInQZbBq1QaolQ/edit?usp=sharing)
2. Opt-in to clients email list
3. Follow client on all social media channels (FB, Insta, Linkedin, Twitter- where relevant) and like FB page of the client
4. Confirm with Lead OBM the client has signed their contract and save contract to CRM record
5. Confirm with Lead OBM the client has paid their invoice
6. Follow up and make sure the client books their initial strategy call. See [Master: SOP- Strategy Sessions- Systems Vault](https://docs.google.com/document/d/1NRfraBF2DpZ-FGLz2vqGMNE5y6zfVduIP7Pd3Wc_lnc/edit?usp=sharing)

**Part 2: Housekeeping**

1. Set up and assign responsibilities and due dates to the “Housekeeping” task list in [Teamwork PM](http://sarahnoked.com/teamwork) to the client project created in part 1. Refer to [SOP- Project & Task Management- Systems Vault](https://docs.google.com/document/d/1c7REsC8MsWBBDmtKR6bpULsGVNPt-JGtC7Xwjx9xThg/edit) and navigate to the section ‘Creating a task list from a template’.

This task list includes:

* 1. (not recurring) Update client details to [Master: Client Details- Systems Vault](https://docs.google.com/spreadsheets/d/1jHG9MEvCmCceeMhdQoOiuUFtzoz0OX240_Fw3Km_i98/edit?usp=sharing) and from the client project set up in Part 1, from the “Inbox” task list grab the url for assigning tasks via email and add it to the [Master: Client Details- Systems Vault](https://docs.google.com/spreadsheets/d/1jHG9MEvCmCceeMhdQoOiuUFtzoz0OX240_Fw3Km_i98/edit?usp=sharing)
  2. (not recurring) Create Teamwork Chat chat channel for client and add SN team members with the [SOP- Setting up a Client Channel- Systems Vault](https://docs.google.com/document/d/1L6yVCrnSRMURcwvw3T2q0KsRzDHyK3Lk675WZ6GL8T8/edit?usp=sharing)
  3. (not recurring) Introduce yourself to client’s team (once they’ve announced you as the OBM), and if necessary Invite client's team members to Teamwork PM (those that will be using it) using the [Template (Email): Invite client's team members to Teamwork](https://docs.google.com/document/d/1heR5QRnttrB-8k4WMHc0YEyYwO7cRXGG9rjeY9vSf4Q/edit?usp=sharing)
     1. Client subcontractors are to be included under the client company and not “Sarah Noked OBM” company
     2. The client has a task to share the names & email addresses of current team members
  4. (not recurring) Setup Client Google Drive with preliminary SOPs using the [SOP- Setting up Cloud Storage- Systems Vault](https://docs.google.com/document/d/1UAp3UiMq1ys07G9H3V6rCgivbVC2XNis8d5chq4PFJ0/edit?usp=sharing)
     1. The client has a task to create a Google Drive folder titled “Your Name - Shared with Sarah Noked OBM", to share will core team members with editing and sharing permissions granted
     2. The client has a task to share location of files (graphics, headshots, stylesheets, etc.) - or to just pop them in our shared Google Drive
  5. (not recurring) Setup google analytics account for a client or add a custom dashboard to their account (once details are shared with team@sarahnoked.com) using the [SOP- Setting Up Clients in Google Analytics - Systems Vault](https://docs.google.com/document/d/1QO1MnSrzShDW3k_9eJQWCW_O1PuPccOpkq8KrR-1L-s/edit?usp=sharing)
     1. The client has a task to share access to Google Analytics if they have it already
  6. (not recurring) Assign to Web Developer: Set up system for for recurring plugin updates
  7. (not recurring) Assign to Web Developer: Set up recurring backups to the site using UpdraftPlus & system for monitoring them
  8. (not recurring) Set up client folder in LastPass, accept and test all new passwords coming in using the [SOP- Managing Passwords - Systems Vault](https://docs.google.com/document/d/1ePGP-g9Fd9B3XsZxNHh2sUfZfXesgWg_l_kTkDW1wxI/edit?usp=sharing)
  9. (not recurring) Verify that the client has shared their calendars with [sarah@sarahnoked.com](mailto:sarah@sarahnoked.com)
  10. (not recurring)Create an action plan (post GDTB call) using the [SOP - GDTB Strategy Call - Systems Vault](https://docs.google.com/document/d/1tGAT9SPKdWBhYuQ3AAyXcXo7LotombgLtLlD-F6LuV0/edit?usp=sharing)

**Part 3: Ongoing**

1. Set up and assign responsibilities and due dates to the “Project Management” task list in [Teamwork PM](http://sarahnoked.com/teamwork) to the client project created in part 1. Refer to [SOP- Project & Task Management- Systems Vault](https://docs.google.com/document/d/1c7REsC8MsWBBDmtKR6bpULsGVNPt-JGtC7Xwjx9xThg/edit) and navigate to the section ‘Creating a task list from a template’.

This task list includes:

* 1. (daily) Set up a task to check the clients PM tool daily (unless advised otherwise)
  2. (daily) Set up a task for BOD/EOD reporting using the [SOP- BOD/EOD Reporting- Systems Vault](https://docs.google.com/document/d/1D1XVRY1S9TtENTw2pLSjdbHuQXptsuNsBkrhi_J_-Mw/edit) (unless advised otherwise)
  3. (monthly) Metrics Reporting using [SOP - Global Metrics Management - Systems Vault](https://docs.google.com/document/d/1tCyc_OdZbY-3gFuk9BB_48ooKKiAZSvlJNghNTNIDeE/edit?usp=sharing).
  4. (monthly) Create a monthly action plan using the [SOP - Creating A Monthly Action Plan - Systems Vault](https://docs.google.com/document/d/1S3ok6H9qhla_i1HR1BhO3PgcaTl9um9o9NOqkp86m9o/edit?usp=sharing)
  5. (quarterly) Request feedback from client using the [SOP- Requesting Testimonial from Clients- Systems Vault](https://docs.google.com/document/d/1NdObue4gpS9QxuZohq-YjY0oY_JhKbwD71qAtjMF6Jw/edit?usp=sharing)
  6. (weekly) End of week time reporting (Send an email to the client using [SN Template (Email): Time Reporting to Client- Systems Vault](https://docs.google.com/document/d/1H0o228UXh9QAyFxUSKNFiDBPmt87bcEkMENb3QUyzF8/edit?usp=sharing))
  7. (weekly) Verify website and theme updates
  8. (weekly) Verify success backups

**Created by:**

**Department:** Delivery

**Date:**

**Revised:**

**Revised by:**