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**SOP- Creating and Keeping Client Briefs Current - Systems Vault**

**PREREQUISITE**

[SOP- MASTER Client Onboarding- Systems Vault](https://docs.google.com/document/d/1h15rYHmTzGFdfzso_DxqyYtqkFcpNlM8DWo4YLwYBn4/edit?usp=sharing)

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

[Ontraport](http://sarahnoked.com/ontraport)

**PURPOSE**

We create and maintain client briefs so that all important information on each client can be found in one central location. This is used as a reference for OBMs or Sarah while working with the client. Client briefs are especially useful when an OBM goes on vacation and has to assign the responsibility of OBM to another OBM. The client brief contains everything that the stand-in OBM needs to know.

**POLICY**

Updating the client brief happens at the onboarding of a client, monthly, and especially before a vacation. Every time a client relays new information to their OBM, it should be added into the Client Brief.

OBMs will routinely review client briefs once a month to verify that they are up to date.

**PARTY**

Online Business Manager

**PROPERTY**

Online Business Manager

**PROCESS**

Part 1: Creating the client brief while onboarding a client

Part 2: Updating the client brief as part of OBM duties

Part 3: Updating the client brief before you go on vacation

**PROCEDURE**

**Part 1: Creating the client brief while onboarding a client**

1. Access [SN Master: Client Details](https://docs.google.com/spreadsheets/d/1jHG9MEvCmCceeMhdQoOiuUFtzoz0OX240_Fw3Km_i98/edit?usp=sharing) and create a new row for the client
2. The Confident OBM will review client discovery call notes, video, and welcome questionnaire and pull relevant information into the brief. To access this information:
   1. Login to [Ontraport](http://sarahnoked.com/ontraport)
   2. Click on the “Contacts” tab in the top left corner.
   3. Use the search field to find the client in the database
   4. Open the client’s contact record.
   5. Click on “Notes and Tasks” on the left-hand side
   6. Here you will find Discovery Call, Breakthrough Call, and GDTB notes for the client.
   7. Click on Questionnaires
   8. Here you can review the new client’s answers on the Discovery Call Questionnaire, Breakthrough Planner, and GDTB Planner.
3. During the following strategy meeting with the client, Sarah/whoever is doing the strategy call will ask questions to be able to fill out the rest of the client brief.

**Part 2: Updating the client brief as part of OBM duties.**

There are certain client details that can be answered only after we have started working with the client.

1. Each OBM will continue to update the client brief until it is completely filled
   1. If any questions are left unanswered after the first strategy call, ask the questions in the next strategy call.
   2. You can also ask some of these questions over Teamwork correspondence- set them a task to send over information
      1. This should happen only with questions that are black and white such as email addresses of team members.
   3. After a few weeks of working with a client the Confident OBM should be able to fill in certain questions that only a OBM can answer:
      1. Cookies
      2. Communication type
      3. History of business/how we work with them
      4. How often do we report to the client (EOD/EOW reporting)
2. After the client brief is completely filled, your duties as an OBM are not finished! Every time that new information is relayed or there are changes in a client's business you must immediately update the [Master: Client Details](https://docs.google.com/spreadsheets/d/1jHG9MEvCmCceeMhdQoOiuUFtzoz0OX240_Fw3Km_i98/edit?usp=sharing)

**Part 3: Updating the client brief before you go on vacation**

1. Before going on vacation you must access the [Master: Client Details](https://docs.google.com/spreadsheets/d/1jHG9MEvCmCceeMhdQoOiuUFtzoz0OX240_Fw3Km_i98/edit?usp=sharing) and ensure that all answers are up to date!

**Created by:**

**Department:** Delivery

**Date:**

**Revised:**

**Revised by:**