Client Handoff Checklist

This checklist ensures all critical handoff tasks are completed before closing the onboarding phase.

Task	**Status**	**Notes**
Tools delivered	☐	Google Analytics + HubSpot access shared via email
Access Confirmed	☐	Client confirmed access on 06/19 via Slack.
Support contact assigned	☐	Assigned to John D. from Tier 1 support—escalation noted
Training Confirmed	☐	Client completed walkthrough training on 06/18 (recording saved)

This template is reusable for each client.

Client Playbook

Overview:

Welcome to the Customer Onboarding Playbook. This document guides new clients through our onboarding process.

Onboarding Phases:

1. **Client Intake**

- CRM entry
- Welcome email

2. **Account Setup**

- Internal account creation
- Kickoff meeting

3. **Training & Handoff**

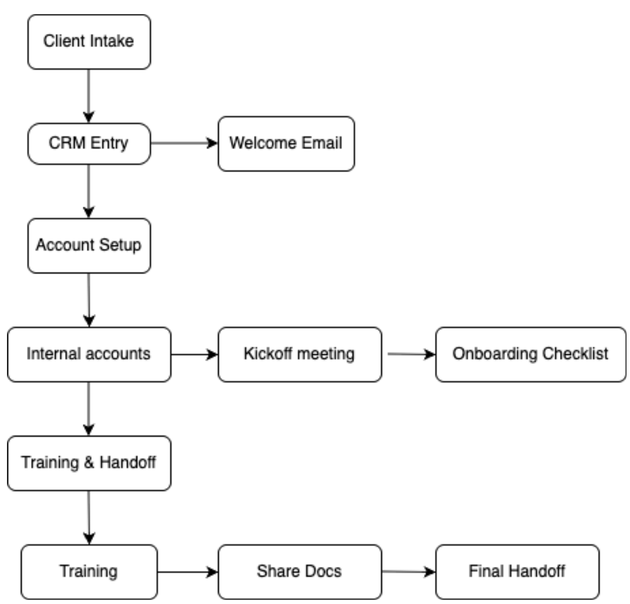
- Live walkthrough
- Handoff checklist

Roles & Responsibilities:

Role	Responsibility
Account Manager	Client communication
Onboarding Team	Setup & checklist execution
Support Team	Handles post-onboarding queries

Estimated Timeline:

- Typical onboarding time: **5–7 business days**



Customer Onboarding Workflow Diagram

This flowchart visually represents the client onboarding journey, from intake to final handoff.

It outlines all internal coordination and client touchpoints:

- **Client Intake:** Begins with CRM entry and welcome communication
- **Account Setup:** Internal tools are created, and a kickoff meeting is scheduled
- **Training & Handoff:** Training is delivered, docs are shared, and the client is transitioned

FAQs and SOPs

Frequently Asked Questions:

Q: How long does onboarding take?

A: Usually 5–7 business days.

Q: Who is my main point of contact?

A: The account manager assigned to you (listed in the CRM).

Q: What do I need to do as a client?

A: Just be responsive on email/Slack and attend the kickoff call.

Standard Operating Procedures (SOPs)

Welcome Email

Use this script to send a standard welcome message to all clients.

Kickoff Meeting Agenda

- Introduction
- Tools overview
- Q&A
- Next steps

Handoff Checklist

- All tools are set up
- Docs shared
- Support contact confirmed

Process Documentation

This page outlines the team's internal steps to onboard a new client.

Step-by-Step Tasks:

1. **Add client to CRM**

→ Use Google Sheets to log name, contact info, account manager, and onboarding status.

2. **Send a welcome email**

→ Use pre-written template (see below)

3. **Create internal accounts**

→ Email, Trello board, and Slack workspace

4. **Schedule a kickoff meeting**

→ Via Google Calendar or mock scheduler

5. **Complete onboarding checklist**

→ The checklist includes tools access, documentation links, and status updates

6. **Share Confluence links**

→ Send the client the Playbook + SOPs via Slack

CRM Sheet (Mock Link)

Client CRM

Welcome Email Template:

Subject: Welcome to [Your Company Name]!

Hi [Client Name],

We're excited to have you onboard. Here's what to expect in the coming days...

[Your Name]
Account Manager

Live Task View

KAN-13: CRM data for new client(NovaTech) TO DO

HK Assigned to Harshitha Kotikalapudi • Updated 3 hours ago

Medium

Jira

Open preview

KAN-14: All Tasks This Week TO DO

HK Assigned to Harshitha Kotikalapudi • Updated 3 hours ago

Medium

Jira

Open preview

KAN-15: External Communication TO DO

Updated 3 hours ago

Medium

Jira

Open preview