CLIENT ONBOARDING PROCESS MANUAL

Consulting Services Division

===================

OVERVIEW

===================

This manual outlines the standard process for onboarding new consulting clients. The typical onboarding timeline is 2-4 weeks depending on client size and complexity.

WHO IS RESPONSIBLE:

- Sales Team: Initial contact and proposal (Days 1-3)
- Legal Team: Contract review and execution (Days 4-5)
- Account Manager: Overall client relationship and coordination (Days 1-28)
- Project Manager: Project execution and delivery (Days 8-28)
- Consulting Team: Technical delivery and implementation (Days 11-28)

TIMELINE OVERVIEW:

- Phase 1: Initial Contact (Days 1-3)
- Phase 2: Contract & Setup (Days 4-7)
- Phase 3: Kickoff (Days 8-10)
- Phase 4: Discovery (Days 11-21)
- Phase 5: Execution Planning (Days 22-28)

===================

PHASE 1: INITIAL CONTACT (Days 1-3)

===================

Step 1: Lead Qualification (Duration: 1-2 hours)

The sales team receives the inquiry through various channels (website form, referral, cold outreach). Within 24 hours, they:

- Conduct initial discovery call (30 minutes)
- Assess client needs and fit with our services
- Determine if we can provide value
- Qualify budget and timeline expectations
- Identify key decision makers

The sales representative is responsible for this step. If the lead doesn't qualify, they send a polite decline email with alternative resources.

Step 2: Proposal Development (Duration: 1-2 days)

Once the lead is qualified, the sales team:

- Assigns a dedicated account manager who will be the main point of contact
- Schedules a detailed needs assessment call (1-2 hours) with key stakeholders
- Develops a customized proposal including:
  * Executive summary
  * Detailed scope of work
  * Project timeline with milestones
  * Pricing breakdown and payment terms
  * Team composition and bios
  * Case studies and references
- Sends proposal within 48 hours of the discovery call

The account manager is responsible for coordinating this step. The proposal must be reviewed by the practice lead before sending to the client.

Step 3: Proposal Review

- Schedule proposal presentation
- Answer client questions
- Negotiate terms if needed
- Obtain client approval

===================

PHASE 2: CONTRACT & SETUP (Days 4-7)

===================

Step 1: Contract Execution

- Legal team reviews final terms
- Send contract for signature
- Client signs via DocuSign
- Finance team sets up billing

Step 2: Team Assignment

- Assign project manager
- Select consulting team members
- Schedule internal kickoff meeting
- Review client background and requirements

Step 3: Access Setup

- Create client accounts in project management system
- Set up shared workspace (SharePoint/Teams)
- Configure communication channels
- Send welcome email with access instructions

===================

PHASE 3: KICKOFF (Days 8-10)

===================

Step 1: Kickoff Meeting Preparation

- Prepare kickoff presentation
- Create project charter
- Define success metrics
- Prepare agenda and materials

Step 2: Client Kickoff Meeting (2 hours)

Agenda:

- Introductions (15 min)
- Project overview and objectives (20 min)
- Roles and responsibilities (15 min)
- Timeline and milestones (20 min)
- Communication plan (15 min)
- Tools and processes (15 min)
- Q&A (20 min)

Step 3: Post-Kickoff Actions

The project manager is responsible for these follow-up tasks:

- Send detailed meeting notes within 24 hours to all attendees
- Distribute action items with owners and due dates
- Schedule regular status meetings (weekly for first month, then bi-weekly)
- Set up project tracking dashboard
- Begin discovery phase activities
- Ensure client team completes required security training (if accessing our systems)

Note: If the client will have access to our internal systems, they must complete our security awareness training within the first week. This training covers password requirements, data handling, and incident reporting procedures. Contact the IT security team at security@company.com to enroll client users.

===================

PHASE 4: DISCOVERY (Days 11-21)

===================

Step 1: Information Gathering

- Conduct stakeholder interviews
- Review existing documentation
- Analyze current processes
- Identify pain points and opportunities

Step 2: Analysis

- Synthesize findings
- Identify gaps and recommendations
- Develop initial roadmap

- Create presentation materials

Step 3: Discovery Presentation

- Present findings to client
- Discuss recommendations
- Refine approach based on feedback
- Get approval to proceed

===================

PHASE 5: EXECUTION PLANNING (Days 22-28)

===================

Step 1: Detailed Planning

- Break down project into phases
- Create detailed work breakdown structure
- Assign resources and responsibilities
- Develop risk mitigation plan

Step 2: Baseline Establishment

- Document current state metrics
- Set target goals and KPIs
- Establish measurement framework
- Create dashboard for tracking

Step 3: Go-Live Preparation

- Finalize execution plan

- Confirm resource availability
- Schedule regular check-ins
- Begin execution phase

===================

QUALITY CHECKPOINTS

===================

Throughout onboarding, ensure:

Day 3: Proposal delivered on time

Day 7: Contract signed and team assigned

Day 10: Successful kickoff meeting

Day 21: Discovery complete and approved

Day 28: Execution plan finalized

If any checkpoint is missed, escalate to senior management.

===================

CLIENT COMMUNICATION

===================

Frequency:

- Week 1-2: Daily updates
- Week 3-4: Every other day
- After onboarding: Weekly status meetings

Channels:

- Primary: Email and scheduled calls
- Urgent: Phone or Teams chat
- Documentation: Shared workspace
- Formal: Monthly executive summaries

===================

COMMON CHALLENGES

===================

Challenge: Delayed contract signing

Solution: Follow up every 2 days, offer to answer questions, escalate to sales director if delayed more than 1 week

Challenge: Incomplete information from client

Solution: Send specific requests with deadlines, schedule working sessions to gather information together

Challenge: Scope creep during onboarding

Solution: Document all requests, assess impact on timeline/budget, get formal approval for changes

===================

SUCCESS METRICS

===================

Track these metrics for each onboarding:

- Time to contract signature (target: 7 days)
- Time to kickoff (target: 10 days)
- Client satisfaction score (target: 8/10 or higher)
- On-time delivery of milestones (target: 100%)
- Budget variance (target: within 5%)

===================

ESCALATION PROCESS

===================

When to escalate:

- Contract negotiations stalled >1 week
- Client unresponsive for >3 business days
- Scope changes >20% of original
- Budget concerns
- Resource conflicts

Escalation path:

1. Account Manager
2. Practice Lead
3. VP of Consulting
4. Chief Operating Officer