CLIENT ONBOARDING PROCESS MANUAL
Consulting Services Division

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OVERVIEW
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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.

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PHASE 1: INITIAL CONTACT (Days 1-3)
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Step 1: Lead Qualification
- Sales team receives inquiry
- Conduct initial discovery call (30 minutes)
- Assess client needs and fit
- Determine if we can provide value

Step 2: Proposal Development
- Assign account manager
- Conduct detailed needs assessment (1-2 hours)
- Develop customized proposal
- Include scope, timeline, and pricing
- Send proposal within 48 hours of discovery call

Step 3: Proposal Review
- Schedule proposal presentation
- Answer client questions
- Negotiate terms if needed
- Obtain client approval

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

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PHASE 3: KICKOFF (Days 8-10)
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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
- Send meeting notes within 24 hours
- Distribute action items
- Schedule regular status meetings
- Begin discovery phase

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PHASE 4: DISCOVERY (Days 11-21)
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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

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PHASE 5: EXECUTION PLANNING (Days 22-28)
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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

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QUALITY CHECKPOINTS
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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.

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CLIENT COMMUNICATION
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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

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COMMON CHALLENGES
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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

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SUCCESS METRICS
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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%)

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ESCALATION PROCESS
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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