# Client Onboarding SOP

**BrightScale Marketing Agency**
**Standard Operating Procedure**
**Prepared by:** RC Indus
**Position:** Executive Assistant
**Version:** 1.0
**Effective Date:** July 2026

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## Purpose

To ensure every new client is onboarded through a consistent process covering communication, documentation, scheduling, project setup, and internal coordination.

## Scope

This SOP applies to all new clients after the signed proposal or service agreement has been received.

## Required Tools

| Tool | Purpose |
|---|---|
| Gmail | Client communication |
| Google Calendar | Schedule meetings and deadlines |
| Google Drive | Store client documents |
| Asana | Project and task management |
| Google Meet | Kickoff and client meetings |
| Canva | Presentation and marketing assets |

# Roles & Responsibilities

| Role | Responsibilities |
|---|---|
| Executive Assistant | Coordinate onboarding process |
| Account Manager | Primary client communication |
| Marketing Team | Campaign preparation |
| Operations Manager | Internal workflow setup |

# Client Onboarding Workflow

## Step 1 — Receive Signed Proposal

**Objective**

Confirm the client has officially approved the proposal before beginning onboarding.

**Checklist**

- ☐ Signed proposal received
- ☐ Client information verified
- ☐ Payment terms confirmed

## Step 2 — Create Client Folder

Create a Google Drive folder.

Recommended folder structure:

Client Name

- Contracts
- Meeting Notes
- Presentations
- Invoices

- Brand Assets
- Reports

## Step 3 — Create Asana Project

Project Name:

Client Name - Onboarding

Assign:

- Executive Assistant
- Marketing Team
- Operations Manager

Create initial tasks:

- Kickoff Meeting
- Collect Brand Assets
- Create Timeline
- Internal Team Brief

## Step 4 — Schedule Kickoff Meeting

Create a Google Calendar invitation.

Include:

- Google Meet link
- Date & time
- Meeting agenda
- Attendees

## Step 5 — Send Welcome Email

The email should include:

- Welcome message
- Introduction of primary contact

- Kickoff meeting confirmation
- Expected timeline
- Next steps

### Step 6 — Confirm Client Access

Verify that the client has access to:

- ☐ Google Drive
- ☐ Shared resources
- ☐ Meeting links
- ☐ Contact information
- ☐ Project timeline

## Quality Control

### Quality Checklist

| Item | Status |
| --- | --- |
| Signed proposal received | ✔ |
| Client folder created | ✔ |
| Calendar invitation sent | ✔ |
| Kickoff meeting scheduled | ✔ |
| Welcome email sent | ✔ |
| Asana project created | ✔ |
| Internal team notified | ✔ |
| Client access confirmed | ✔ |

## Communication Standards

- Respond to client inquiries within one business day.
- Keep communication clear, professional, and timely.

- Document important discussions after meetings.
- Notify internal stakeholders of any onboarding changes.

# Exception Handling

If onboarding cannot proceed due to missing documents, delayed approvals, or unavailable stakeholders:

- Notify the Account Manager immediately.
- Inform the client of any delays.
- Record the issue in the project tracker.
- Resume onboarding once requirements are completed.

# Document Control

| Item | Details |
|---|---|
| Document Owner | Executive Assistant |
| Department | Operations |
| Review Frequency | Every 6 Months |
| Version | 1.0 |