SYSTEMS & PROCESS DESIGN · SAMPLE DELIVERABLE

Standard Operating Procedure: New Client Onboarding

For: Summit Peak Consulting (fictional) · SOP CS-01

SAMPLE · FICTIONAL DATA

SOP ID: CS-01 **Version:** 1.2 **Owner:** Operations Lead **Last reviewed:** 10 Nov 2026

Next review: 10 May 2027

1. Purpose

Give every new client the same smooth, professional start, so work begins within 5 working days of signing and nothing is missed.

2. When to use it

Every time a client signs a proposal or buys a bundle. **Not** for one-off tasks under 2 hours (use SOP CS-02 instead).

3. Roles (RACI)

Activity	Client Success (VA)	Consultant	Operations Lead	Client
Welcome email and pack	R	I	A	I
Access checklist	R	I	A	C
Kick-off call	C	R	A	C
Scope approval	I	R	A	C
First-week plan	R	C	A	I
Monday report	R	C	A	I

R = does the work · A = accountable for it being done right · C = consulted · I = kept informed.

4. Tools and templates

Tools

- Gmail / Google Workspace
- Google Drive
- Asana (project templates)
- Google Calendar booking page

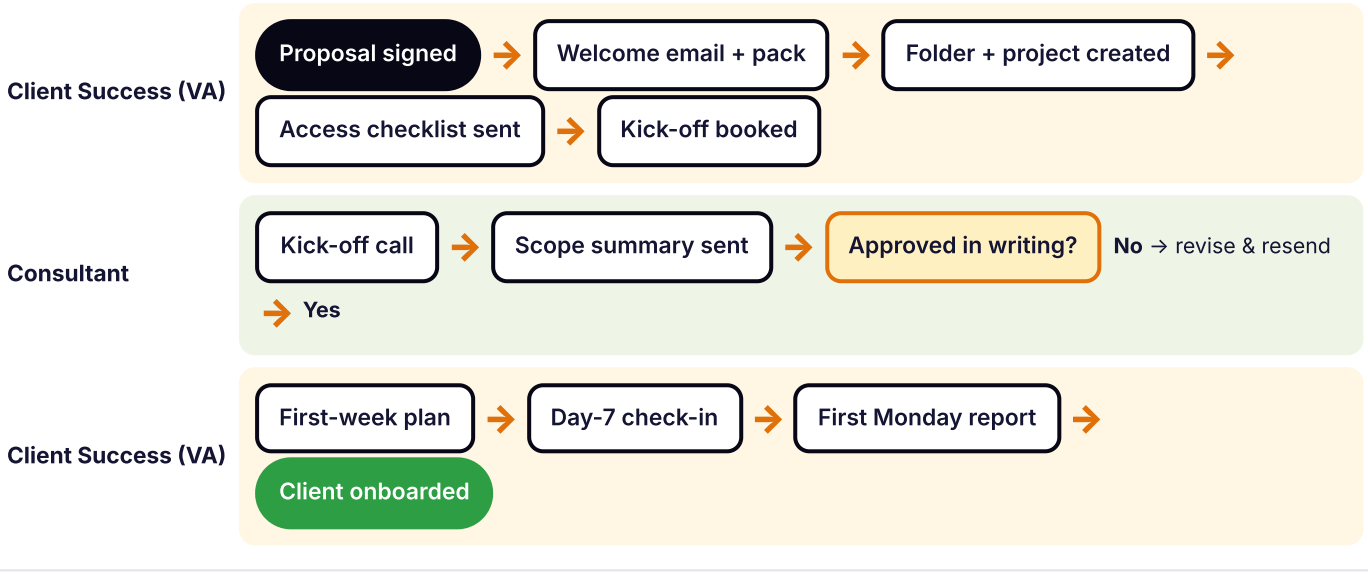
Templates

- Welcome email
- Welcome pack (PDF)
- Access checklist
- Scope summary

Standard

- ✔ Kick-off within 5 working days
- ✔ Scope approved in writing
- ✔ First Monday report on time

5. Process map



6. Step-by-step

#	Step	Who	When	Tool / template
1	Send welcome email and welcome pack	Client Success (VA)	Same day as signed proposal	Gmail template 'Welcome – new client'; Welcome pack PDF
2	Create client folder and project	Client Success (VA)	Day 1	Drive folder template; Asana project template
3	Send access checklist	Client Success (VA)	Day 1	Access checklist form
4	Book kick-off call (45 min)	Client Success (VA)	Within 3 working days	Calendar booking link
5	Hold kick-off call; confirm goals, scope and hours	Consultant	Day 3–5	Kick-off agenda; Scope summary template
6	Send scope summary for written approval	Consultant	Within 24 h of call	Scope summary template
7	Set up first-week plan and recurring tasks	Client Success (VA)	After approval	Asana project; recurring task list
8	Day-7 check-in email	Consultant	Day 7	Template 'Day-7 check-in'
9	First Monday report sent	Client Success (VA)	First Monday after start	Weekly report template

7. Quality checks before day 5

- ✓ Client has received the welcome pack
- ✓ All access requested on the checklist is working
- ✓ Scope, hours estimate and start date approved in writing
- ✓ Recurring tasks entered with owners and due dates
- ✓ Client knows when to expect the first Monday report

8. If something goes wrong

- ! **Client hasn't returned access in 3 days:** send reminder template; after 5 days, call.
- ! **Scope not approved in 2 days:** Consultant follows up by phone.
- ! **Kick-off can't happen within 5 days:** tell the Operations Lead the same day.

9. Access checklist (sent at step 3)

Access needed	How the client gives it	Done
Shared email inbox	Add our team member as a delegate (no passwords by email)	☐
Google Drive folder	Share folder with our work address	☐
Calendar	Share with 'Make changes to events'	☐
Booking / CRM tool	Add as a user on the client's own plan	☐
Accounting software	Invite as 'Standard' user, not admin	☐

The client keeps ownership of every account and subscription. We are added as users and removed when the work ends.

10. Version history

Version	Date	Change	By
1.0	12 Mar 2026	First version	Operations Lead
1.1	4 Jul 2026	Added day-7 check-in	Consultant
1.2	10 Nov 2026	Access checklist: client-owned accounts only	Operations Lead

Sample SOP written by Bridge Imara for a fictional consultancy. Your SOPs are written around how your business actually works.