STANDARD OPERATING PROCEDURE

Client Onboarding SOP

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Revision	1.0
Owner	Customer Success Manager
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Review cycle	Every 12 months

1. Purpose

To move a new client from signed contract to live, successful use of the product or service, with a smooth handoff, clear setup steps and an early check that they are getting value.

2. Scope

Applies to new client accounts after a contract is signed, through go-live and the first milestone review. Ongoing account management after that point is covered by a separate process.

Definitions

Kickoff call	The first meeting with the client after the sales handoff, used to confirm goals, timeline and key contacts.
Go-live	The point at which the client is actively using the product or service in their normal operations.
Client contact	The primary person at the client organization responsible for the onboarding project on their side.

3. Responsibilities

Account Manager	Owns the sales-to-onboarding handoff and stays informed through go-live.
Implementation Specialist	Runs the kickoff, configures the account, migrates data and trains the client.
Client Contact	Provides requirements and data, coordinates their internal team, and confirms sign-off at each stage.
Customer Success Manager	Oversees the onboarding timeline, resolves blockers, and leads the first milestone review.

RACI matrix

Activity	Account Manager	Implementation Specialist	Client Contact	Customer Success Manager
Sales-to-onboarding handoff	R/A	I	I	C
Run kickoff call and gather requirements	I	R/A	R	C
Configure account and migrate data	-	R/A	C	I

Activity	Account Manager	Implementation Specialist	Client Contact	Customer Success Manager
Train the client team	-	R/A	R	I
Confirm go-live and first milestone review	I	C	R	R/A

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Signed contract and sales handoff notes
- Onboarding project plan template
- Requirements gathering questionnaire
- Client account in the product or service platform
- Training materials or client-facing guides
- Data migration checklist

5. Procedure

Step	Task	Owner	Done
5.1	**Complete the sales-to-onboarding handoff** The account manager shares the signed contract, agreed scope, key contacts and any commitments made during the sales process with the implementation specialist before the kickoff call. **Checkpoint:** The handoff includes everything promised during the sale, so onboarding does not miss a commitment.	Account Manager	☐
5.2	**Schedule the kickoff call** The implementation specialist schedules the kickoff call with the client contact within the agreed timeframe after contract signature, sharing an agenda in advance.	Implementation Specialist	☐
5.3	**Run the kickoff call** The implementation specialist confirms the client's goals, timeline, key contacts and success criteria for onboarding, and agrees next steps with the client contact.	Implementation Specialist	☐
5.4	**Gather detailed requirements** The implementation specialist sends the requirements questionnaire and works with the client contact to confirm configuration needs, integrations and any data to migrate.	Implementation Specialist	☐
5.5	**Configure the account** The implementation specialist sets up the client's account, users and settings according to the confirmed requirements.	Implementation Specialist	☐
5.6	**Migrate client data** The implementation specialist migrates the client's data using the data migration checklist and validates it against the client's source records for accuracy. **Checkpoint:** Migrated data is validated against the client's source records before training begins.	Implementation Specialist	☐
5.7	**Train the client team** The implementation specialist runs training sessions for the client's team, covering core workflows and answering configuration-specific questions.	Implementation Specialist	☐

Step	Task	Owner	Done
5.8	**Run a pre-go-live review** The implementation specialist and client contact review the configured account together, confirming everything needed is in place before going live. **Checkpoint:** The client contact confirms in writing that the account is ready before go-live is scheduled.	Implementation Specialist	☐
5.9	**Go live** The client begins using the product or service in their normal operations, with the implementation specialist available for immediate support in the days that follow.	Client Contact	☐
5.10	**Monitor early usage** The customer success manager monitors usage and any support tickets in the first weeks after go-live, flagging any signs the client is struggling to adopt the product or service.	Customer Success Manager	☐
5.11	**Hold the first milestone review** The customer success manager meets with the client contact to review progress against the original success criteria and agree on next steps or additional support.	Customer Success Manager	☐
5.12	**Transition to ongoing account management** The customer success manager confirms onboarding is complete, documents any open items, and hands the account to its ongoing account management process.	Customer Success Manager	☐

6. Quality checks

- Every commitment from the sales process is documented in the handoff before onboarding starts.
- Migrated data is validated against source records before training.
- The client contact confirms readiness in writing before go-live.
- A milestone review happens within the agreed window after go-live.

7. Records

- Sales handoff notes
- Requirements questionnaire and configuration notes
- Data migration validation results
- Milestone review notes

8. KPIs

- Time from contract signature to go-live
- Percentage of onboarding milestones met on schedule
- Client satisfaction score at the first milestone review
- Support ticket volume in the first 30 days after go-live

9. Common mistakes

- Starting the kickoff call without a complete sales handoff.
- Migrating data without validating it against the client's source records.
- Going live before the client confirms readiness.
- Letting the account go quiet after go-live with no milestone review scheduled.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

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