Client Intake Workflow Process Document

1. Objective

- To outline the steps and requirements for onboarding new consulting clients.
- To standardize the intake process for consistency and quality.

2. Intake Workflow Steps

1. **Initial Inquiry**
    - Receive client inquiry via web form, email, or phone.
    - Log inquiry details.
2. **Discovery Call**
    - Schedule and conduct an initial call to discuss client needs, scope, and expectations.
    - Record notes and key points.
3. **Information Gathering**
    - Send intake questionnaire to client.
    - Request relevant documents or data.
4. **Proposal & Quotation**
    - Prepare and send a tailored consulting proposal and fee estimate.
5. **Agreement & Onboarding**
    - Finalize contract or agreement.
    - Send onboarding package (welcome letter, next steps, project timeline).
6. **Project Kickoff**
    - Confirm start date and assign project team.
    - Hold kickoff meeting with client.

3. Key Contacts

Role	Name	Contact
Client Manager	[Name]	[Email / Phone]
Consultant	[Name]	[Email / Phone]

4. Checklist

- Inquiry received and logged
- Discovery call scheduled and held
- Client questionnaire completed
- All required documentation received
- Proposal/quotation sent and approved
- Contract signed
- Onboarding materials sent
- Kickoff meeting held

5. Notes

- This process should be reviewed quarterly for improvements.
- All client data must be handled in accordance with privacy policies.