Client Onboarding Process Workflow

For Consultants

1

Initial Inquiry

Receive and acknowledge client inquiry via email, website, or referral.

2

Discovery Call

Schedule and conduct a call to understand client needs, goals, and expectations.

3

Proposal & Agreement

Prepare and send a tailored proposal along with a consultancy agreement for review and signatures.

4

Client Onboarding Form

Send a detailed onboarding form to collect essential client information and requirements.

5

Kickoff Meeting

Organize a kickoff session to align on project scope, timelines, and deliverables.

6

Resource & Access Setup

Facilitate any technical setups such as account access, data sharing, or project management tools.

7

Project Execution Begins

Begin consultancy work as outlined, maintaining regular communication and progress updates.