WORKFLOW TEMPLATE

SLIQ360

The Ultimate New Client Onboarding Workflow

Standardized task structure, responsibility matrix, and zero-oversight client intake process

ESTIMATED DURATION	TOTAL KEY TASKS	COMPATIBILITY
14 Days	**10 Steps**	**CSV, Excel, PMS**

1. Task Breakdown & Responsibility Matrix

ID	PHASE	TASK NAME	ASSIGNED ROLE	DUE DATE	APPROVAL?
ONB-01	1. Pre-launch	Sales to Ops Handover	Sales Lead	Day 0	No
ONB-02	1. Pre-launch	Create Client Folder & Profile	Admin / Ops	Day 0	No
ONB-03	1. Pre-launch	Send Welcome Kit	Account Manager	Day 1	No
ONB-04	2. Access & Intake	Collect Access & Documentation	Tech Lead	Day 4	Required
ONB-05	2. Access & Intake	Schedule Kick-off Meeting	Account Manager	Day 5	No
ONB-06	3. Setup	Configure Workspace	Tech Team	Day 7	Required
ONB-07	3. Setup	Assign Dedicated Team	Resource Manager	Day 8	No
ONB-08	4. Alignment	Hold Kick-off Meeting	Project Manager	Day 10	Client
ONB-09	5. Wrap-up	Send Meeting Notes & Deliverables	Project Manager	Day 12	No
ONB-10	5. Wrap-up	Internal Onboarding Review & Close	Account Manager	Day 14	Required

2. Raw CSV Import Format

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"Task Name","Description","Section","Assignee Role","Due Days","Requires Approval"
"Sales to Ops Handover","Transfer client brief, signed contract, and key objectives","1. Pre-launch","Sales Lead","0","No"
"Create Client Folder & Profile","Set up secure Cloud folder and create the profile in CRM / PMS","1. Pre-launch","Admin / Ops","0","No"
"Send Welcome Kit","Send welcome email containing questionnaire and checklist","1. Pre-launch","Account Manager","1","No"
"Collect Access & Documentation","Receive and verify credentials and compliance documents","2. Access & Intake","Tech Lead","4","Yes"
"Schedule Kick-off Meeting","Send calendar invite for the kick-off meeting","2. Access & Intake","Account Manager","5","No"
"Configure Workspace","Set up client environment, permissions, and integrations","3. Setup","Tech Team","7","Yes"
"Assign Dedicated Team","Assign project members and block their capacity","3. Setup","Resource Manager","8","No"
"Hold Kick-off Meeting","Present project roadmap, confirm KPIs and milestones","4. Alignment","Project Manager","10","Yes"
"Send Meeting Notes & Deliverables","Share post-kick-off summary and finalized roadmap","5. Wrap-up","Project Manager","12","No"
"Internal Onboarding Review & Close","Verify completion and transition project to Run mode","5. Wrap-up","Account Manager","14","Yes"
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3. Bonus Email Template: Client Welcome Kit

Subject: Welcome to [Your Company Name] – Next steps for your project

Hi [Client First Name],

We're thrilled to officially welcome you aboard! To ensure a smooth rollout and set our partnership up for success, here are the next 3 simple steps:

1. **Complete the Intake Form:** [Link to Questionnaire] *(3 mins)*
2. **Upload Required Documents & Credentials:** Please upload the requested files to your secure folder here: [Secure Folder Link]
3. **Book Our Kick-off Meeting:** Pick a time that suits your schedule best: [Calendly / Booking Link]

Your dedicated point of contact throughout this project will be **[Account Manager Name]** ([Email] / [Phone]).

Looking forward to working together!

Best regards,
[Your Name / Your Company Name]