

Client onboarding SOP

Version 1.0 - Initial template - customize to your operation.

PURPOSE

Define a consistent, repeatable process to onboard a new client at a digital marketing agency, from signed contract to project kickoff. Use this template as a starting point and tailor each section to your team.

SCOPE

Applies to all staff at a marketing agency responsible for this process. Update the audience and triggers to match your operation.

RESPONSIBILITIES

- Process owner: Owns and maintains this SOP. Reviews quarterly and after every incident.
- Operator: Performs the procedure as written and flags deviations.
- Reviewer: Verifies quality checks and signs off on completion.

MATERIALS & TOOLS

- Checklist or worksheet (paper or digital)
- Required tools, forms, or software for the task
- Access credentials or permissions

PROCEDURE

1. Prepare - Gather every input, tool, and form required before starting.
2. Confirm authorization - Verify you have the access and approvals needed for this task.
3. Execute the core task - Carry out the work as defined for: Onboard a new client at a digital marketing agency, from signed contract to project kickoff.
4. Document the outcome - Log results, timestamps, and the operator's name.
5. Hand off or escalate - Route the output to the next owner or escalate exceptions.
6. Close out - Reset the workspace and confirm all systems are returned to a ready state.

QUALITY CHECKS

- All required fields and forms completed
- Outcome matches the defined acceptance criteria
- Any exceptions logged with reason and resolution

REFERENCES

- Internal policy document
- Customer/patient/client communication template
- Regulatory or compliance requirements (if applicable)