



ONBOARDING HACKS

“ The unexpected solution that got rid of all
my client headaches and saved me 20 hours
— the Architect



Hey, why are onboarding systems so #%&*ing important anyway?

Because they:

- ✓ Set up a client's expectations for a successful relationship
- ✓ Save you and the team time [#awesome!](#)
- ✓ Get the ball rolling!
- ✓ Make the client confident they made the right decision

Unreasonable client requests
Unnecessary project delays
Unproductive team members

...all solved with a deep, professional dive into your client onboarding systems.



Do I really need to systematize all this?

YES! *you'll love me for it later*

Sure, some of these are in your head, but that makes you the bottleneck — so start downloading your brain so you can grow past a small team!

Before you get to your first meeting:

- Expectations:** *What expectations should the client have of you and you of them?*
- Process:** *Who will be delivering your service to the client and how?*
- Definitions and tool kits:** *Educate the client: what do they not now that they need to know to make this engagement smooth?*
- Systems:** *What systems do you need the client to adopt to work with you?*
- Metrics:** *How will you be measuring the success of your time together?*
- Ground rules and communication:** *What are the boundaries you will set with the client, i.e. who will be contacting you or your team, when can they contact, what happens when they don't show up. (Also a great place to remind them of results so their not like UGHHHH why am i doing this).*



Let it goooo!

For the Kick Off meeting:

- Important info:** *what information do you need from the client (either before your engagement or during) to complete your work?*
- Client kick off agenda:** *What does your first meeting look like?*
- Objectives:** *If you meet the team, what are the objectives you want to accomplish from all the different team members?*

After the first meeting:

A common mistake is that people think onboarding is one process. That might be true for a SAAS solution, but not for service-based businesses!

- Check in with your client:** *Any questions/issues/comments?*
- Tracking:** *What platform are you using to track it if different team members are doing different parts of the onboarding?*

**Remember, when it comes to new clients,
as well as your business - delegate and ...**

Let it go ...let it gooooo!