

Nexlyn Process Architect

Process: Client Onboarding · Department: Operations · Owner: Operations Manager
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01. Executive Summary

This Client Onboarding process governs the transition of new clients from signed agreement to active delivery, ensuring consistent information capture, resource allocation, and client expectation-setting. The process spans contract signature through first work delivery, typically completing within 5-7 business days. The Operations Manager owns end-to-end execution with direct involvement from Sales Operations, Delivery Lead, and Client Success Manager. Strategic value: standardised onboarding reduces time-to-first-value by 40%, eliminates resource allocation conflicts, and establishes clear client communication patterns that drive 12-month retention. This documentation matters now because ad-hoc onboarding creates delivery delays, incomplete requirement capture, and inconsistent client experiences that erode margin and satisfaction in the critical first 30 days.

02. Process Flow Diagram

1. Client Signs Agreement & Submits Payment
 2. Sales Ops Verifies Payment in Stripe
 3. Ops Manager Sends Welcome Email with Form Link
 4. Client Completes Onboarding Form in Typeform
 5. Form Complete Within 48 Hours?
 6. Ops Manager Sends Follow-Up/Escalates to CSM
 7. Ops Manager Reviews Form Responses
 8. Ops Manager Creates ClickUp Project
 9. Delivery Lead Assigns Resources
 10. Ops Manager Schedules Kickoff Call via Calendly
 11. Kickoff Call Executed with Client & Team
 12. Ops Manager Sends Summary & Updates Status to Active
 13. Project Manager Assumes Ownership
 14. First Deliverable Milestone Scheduled
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03. SOP Document

Purpose

Systematically transition signed clients from contract execution to active delivery by collecting required information, assigning internal resources, and establishing operational cadence within 5 business days of payment confirmation.

Scope

In Scope: Payment verification, welcome communication, information collection via standardised form, kickoff call scheduling and execution, ClickUp project creation, resource assignment, handoff to delivery team, and confirmation of first deliverable milestone.

Out of Scope: Pre-signature sales activities, contract negotiation, custom pricing approvals, post-kickoff ongoing delivery management, billing disputes, and scope change requests after project activation.

Owner

Primary Owner: Operations Manager (accountable for end-to-end process completion and SLA adherence)

Key Stakeholders: Sales Operations (payment verification), Client Success Manager (relationship)

continuity), Delivery Lead (resource allocation), assigned Project Manager (execution).

Step-by-Step Procedure

1. Payment Verification (T+0 business hours)

- 1.1. Sales Operations confirms payment receipt in Stripe/payment processor
- 1.2. Sales Operations updates CRM deal stage to "Closed-Won" in HubSpot
- 1.3. Sales Operations notifies Operations Manager via Slack #ops-handoffs channel with client name, contract value, and signed agreement link

2. Welcome Email Dispatch (T+2 business hours)

- 2.1. Operations Manager sends templated welcome email from shared ops@company inbox
- 2.2. Email includes: project timeline expectations, onboarding form link (Typeform), Operations Manager direct contact, and next steps overview
- 2.3. Operations Manager logs email send in HubSpot contact timeline

3. Onboarding Form Distribution and Monitoring (T+2 to T+48 business hours)

- 3.1. Typeform onboarding link auto-delivered in welcome email
- 3.2. Form captures: primary contact details, technical environment specifications, access credentials (encrypted), brand assets, project objectives, success metrics, preferred communication channels
- 3.3. Operations Manager monitors form completion status daily in Typeform dashboard
- 3.4. If form incomplete after 24 business hours, Operations Manager sends follow-up email with 24-hour deadline
- 3.5. If form incomplete after 48 business hours, Operations Manager escalates to Client Success Manager for direct outreach

4. Kickoff Call Scheduling (T+48 to T+72 business hours)

- 4.1. Upon form submission, Operations Manager reviews responses for completeness
- 4.2. Operations Manager sends Calendly link for 60-minute kickoff call, offering 3-5 time slots within next 5 business days
- 4.3. Client confirms time; Calendly auto-creates Google Calendar event and sends invites to client primary contact, Operations Manager, assigned Project Manager, and Delivery Lead
- 4.4. Operations Manager creates pre-call briefing document in Google Drive with form responses summary and discussion agenda

5. ClickUp Project Creation (T+48 to T+72 business hours, parallel to Step 4)

- 5.1. Operations Manager creates new project folder in ClickUp under "Active Clients" space
- 5.2. Project named: "[Client Name] – [Service Type] – [Start Month/Year]"
- 5.3. Operations Manager applies appropriate project template based on service type (consulting/implementation/support)
- 5.4. Operations Manager populates custom fields: Client Name, Contract Value, Start Date, Target Delivery Date, Priority Level
- 5.5. Operations Manager uploads signed agreement and onboarding form responses to project Documents section

6. Resource Assignment (T+72 business hours)

- 6.1. Operations Manager reviews resource capacity in ClickUp Workload view
- 6.2. Operations Manager assigns Project Manager and 1-3 delivery team members based on availability and skill match
- 6.3. Operations Manager notifies assigned team via Slack with project overview and kickoff call time
- 6.4. Assigned Project Manager reviews briefing document and prepares kickoff agenda within 24 hours

7. Kickoff Call Execution (T+96 to T+120 business hours)

- 7.1. Operations Manager facilitates call using standard agenda: introductions, project goals review, timeline confirmation, deliverables clarification, communication protocol establishment, Q&A
 - 7.2. Assigned Project Manager presents delivery plan and next steps
 - 7.3. Operations Manager records action items and responsible parties in shared Google Doc
 - 7.4. Operations Manager schedules next check-in call (typically 2 weeks out) before call concludes
8. Post-Kickoff Handoff (within 4 business hours of kickoff call)
 - 8.1. Operations Manager updates ClickUp project status to "Active Delivery"
 - 8.2. Operations Manager sends call summary email to client with action items, assigned owners, and next check-in date
 - 8.3. Operations Manager updates HubSpot contact record with "Onboarding Complete" tag and onboarding completion date
 - 8.4. Assigned Project Manager assumes primary ownership; Operations Manager transitions to exception-only involvement
 - 8.5. Assigned Project Manager schedules first deliverable milestone review within 10 business days of kickoff

Expected Outcome

Client transitions from contract signature to active delivery with complete requirements documentation, assigned delivery resources, established communication cadence, and scheduled first deliverable milestone—all within 5-7 business days. Client receives consistent, professional onboarding experience. Delivery team possesses all information required to execute without re-soliciting client input.

Key Performance Indicators (KPIs)

- Time-to-Kickoff: Calendar days from payment confirmation to complete (target: 5 business days)
- Onboarding Form Completion Rate: Percentage of clients submitting complete form within 48 business hours "e 85 %
- First Deliverable On-Time Rate: Percentage of projects delivering first milestone within committed timeframe "e 90 %
- Onboarding Handoff Defect Rate: Percentage of projects requiring Operations Manager re-engagement post-handoff due to missing information "d 5 %
- Client Onboarding CSAT: Post-kickoff survey score (1-10 scale) "e 8.5

04. Checklist

Pre-Execution

- ☐ Payment confirmed in Stripe and recorded in HubSpot CRM
- ☐ Sales Operations has updated deal stage to "Closed-Won"
- ☐ Signed client agreement uploaded to HubSpot and accessible
- ☐ Operations Manager notified via Slack #ops-handoffs with client details
- ☐ Operations Manager has reviewed contract terms and service scope
- ☐ Appropriate ClickUp project template identified based on service type

Execution

- ☐ Welcome email sent from ops@company inbox within 2 business hours of notification
- ☐ Typeform onboarding form link included in welcome email
- ☐ Email send logged in HubSpot contact timeline
- ☐ Onboarding form completion monitored daily in Typeform dashboard
- ☐ Follow-up email sent if form incomplete after 24 business hours
- ☐ Form responses reviewed for completeness and technical feasibility
- ☐ ClickUp project folder created under "Active Clients" space with standardised naming
- ☐ Project template applied and custom fields populated (Contract Value, Start Date, Priority)

- [] Signed agreement and form responses uploaded to ClickUp Documents section
- [] Resource capacity reviewed in ClickUp Workload view before assignment
- [] Project Manager and delivery team members assigned in ClickUp
- [] Assigned team notified via Slack with project overview and kickoff time
- [] Calendly link sent to client for kickoff call scheduling
- [] Google Calendar event auto-created with all required attendees
- [] Pre-call briefing document created in Google Drive with agenda and form summary
- [] Assigned Project Manager reviews briefing document before kickoff call
- [] Kickoff call conducted using standard agenda template
- [] Action items and owners documented in shared Google Doc during call
- [] Next check-in call scheduled before kickoff call concludes

Post-Execution / Handoff

- [] ClickUp project status updated to "Active Delivery" within 4 hours of kickoff
- [] Kickoff call summary email sent to client with action items and next steps
- [] HubSpot contact record tagged "Onboarding Complete" with completion date
- [] First deliverable milestone review scheduled within 10 business days
- [] Operations Manager confirms Project Manager has assumed primary ownership
- [] All onboarding KPIs logged for weekly reporting
- [] Any process deviations or blockers documented for retrospective review

05. Roles & Responsibilities

| Stage | Responsible | Accountable | Consulted | Informed |

|-----|-----|-----|-----|-----|

| Payment Verification | Sales Operations | Operations Manager | Finance | Client Success Manager |

| Welcome Email Dispatch | Operations Manager | Operations Manager | — | Sales Operations, Assigned Project Manager |

| Form Distribution & Monitoring | Operations Manager | Operations Manager | Client Success Manager (if escalation needed) | Delivery Lead |

| Kickoff Call Scheduling | Operations Manager | Operations Manager | Assigned Project Manager | Client Success Manager |

| ClickUp Project Creation | Operations Manager | Operations Manager | Delivery Lead | Assigned Project Manager |

| Resource Assignment | Operations Manager | Delivery Lead | Assigned Project Manager | Sales Operations |

| Kickoff Call Execution | Operations Manager, Assigned Project Manager | Operations Manager | Delivery Lead | Client Success Manager |

| Post-Kickoff Handoff | Assigned Project Manager | Operations Manager | Delivery Lead | Sales Operations, Finance |

Accountabilities

Operations Manager

- End-to-end onboarding process completion within 5-7 business day SLA
- Accurate capture and documentation of client requirements in ClickUp
- Timely escalation of incomplete form submissions or scheduling conflicts
- Quality assurance of kickoff call execution and action item clarity
- Weekly reporting of onboarding KPIs to leadership

Sales Operations

- Payment verification and CRM stage updates within 2 business hours of receipt
- Accurate handoff communication to Operations Manager via Slack with all required contract details

- HubSpot data integrity for closed-won deals
- Post-signature client record hygiene in CRM

Delivery Lead

- Resource capacity planning and allocation recommendations
- Delivery team member assignment based on skill match and availability
- Escalation of resource constraints that impact onboarding timelines
- First deliverable milestone feasibility validation during project setup

Assigned Project Manager

- Pre-call briefing document review and kickoff agenda preparation
- Active participation in kickoff call and delivery plan presentation
- Ownership of all post-handoff client communication and delivery execution
- First deliverable milestone scheduling and on-time completion
- Proactive communication of blockers to Operations Manager within 24 hours

Client Success Manager

- Secondary escalation point for unresponsive clients during form collection
- Post-kickoff relationship continuity and CSAT survey administration
- Quarterly business review scheduling and strategic account planning
- Renewal pipeline management starting at onboarding completion

06. Risk Analysis

| Risk | Category | Likelihood | Impact | Mitigation |

|-----|-----|-----|-----|-----|

| Client delays onboarding form submission beyond 48 hours, blocking resource assignment | Operational Bottlenecks | High | Medium | Implement automated 24-hour reminder email and escalation to Client Success Manager at 48-hour mark with direct phone outreach |

| Incomplete or ambiguous form responses require multiple clarification rounds, delaying kickoff | Missing/Assumed Steps | Medium | High | Add form validation rules in Typeform requiring minimum character counts for open-ended questions and mandatory file uploads for technical specs |

| Resource availability changes between assignment and kickoff call, requiring last-minute reassignment | Operational Bottlenecks | Medium | High | Delivery Lead confirms assigned team availability 24 hours before kickoff call and maintains backup resource pool; Operations Manager schedules kickoff no earlier than T+96 hours |

| Operations Manager becomes single point of failure during PTO or high-volume periods | Operational Bottlenecks | Medium | High | Cross-train Senior Project Manager as backup onboarding owner; document delegation protocol in shared Operations Runbook with escalation matrix |

| Signed agreement terms conflict with standard onboarding template, causing delivery misalignment | Compliance/Quality | Medium | High | Operations Manager completes contract terms review checklist before ClickUp project creation; flag custom terms in project header and brief delivery team before kickoff |

| Client contact information changes between signature and onboarding, causing communication failures | Handoff/Communication | Low | Medium | Sales Operations confirms client contact details during payment verification and updates HubSpot; Operations Manager validates email deliverability before sending welcome email |

| Kickoff call rescheduled multiple times, extending time-to-delivery beyond acceptable threshold | Operational Bottlenecks | Medium | Medium | Operations Manager offers 3-5 time slots across 2 weeks; if 3 reschedules occur, escalate to Client Success Manager for executive sponsor engagement |

| Critical access credentials or technical environment details omitted from form, discovered during first delivery attempt | Missing/Assumed Steps | High | High | Assigned Project Manager conducts technical readiness verification call within 48 hours post-kickoff focused solely on access validation; checklist includes login confirmation and environment connectivity test |

Critical Watchpoints

Watchpoint 1: Form Submission Lag

Monitor daily the percentage of new clients completing the onboarding form within 48 business hours. A drop below 70% signals inadequate urgency in welcome email language, form complexity issues, or Sales setting incorrect post-signature expectations. This surfaces via Typeform completion rate dashboard filtered by submission date. Operations Manager must review weekly and adjust messaging or escalate to Sales leadership if pattern persists beyond two consecutive weeks.

Watchpoint 2: Resource Reassignment Rate

Track the number of projects requiring resource changes between initial assignment and kickoff call completion. Reassignment rate above 15% indicates Delivery Lead lacks real-time capacity visibility or Operations Manager is scheduling kickoff calls too early. This surfaces via ClickUp task reassignment audit log filtered by "Onboarding" project tag. Operations Manager and Delivery Lead must conduct bi-weekly capacity planning syncs to align assignment timing with confirmed availability.

07. Process Improvement Recommendations

Clarity & Standardisation

Recommendation: Implement onboarding form completion gate before kickoff scheduling

Configure Typeform to auto-trigger Calendly link delivery only upon form submission, eliminating manual monitoring and reducing Operations Manager touch time by 30 minutes per client. Operations Manager configures Zapier integration connecting Typeform submission webhook to Calendly invite automation.

Success metric: Form completion rate within 48 hours increases to 90%
Scheduling depends on form submission.

Recommendation: Create contract terms checklist integrated into ClickUp project template

Add a custom checklist field in ClickUp onboarding template requiring Operations Manager to verify 8 key contract terms (payment schedule, deliverable milestones, SLA commitments, approval workflows) before project status moves to "Active Delivery." Operations Manager populates checklist during project creation; Delivery Lead cannot assign resources until checklist complete. Success metric: Post-handoff scope clarification requests from Project Managers decrease by 60%.

Operational Efficiency & Automation

Recommendation: Automate CRM-to-ClickUp project creation via Make.com scenario

Build Make.com workflow triggered by HubSpot deal stage change to "Closed-Won" that auto-creates ClickUp project with pre-populated fields (client name, contract value, service type) and notifies Operations Manager in Slack. Operations Manager owns workflow setup with RevOps support; Sales Operations ensures HubSpot data hygiene. Success metric: Project creation time reduces from 15 minutes to 2 minutes; human error in project naming/field population drops to zero.

Recommendation: Deploy Calendly routing rules based on service complexity

Configure Calendly to automatically assign kickoff calls to Operations Manager (standard projects) or Operations Manager + Delivery Lead (enterprise/complex projects) based on contract value thresholds or service type tags in HubSpot. Operations Manager sets routing logic in Calendly; Sales Operations ensures accurate service type tagging at deal close. Success metric: Enterprise project kickoff quality scores increase by 1.2 points as Delivery Lead participation becomes systematic rather than ad-hoc.

Risk Reduction & Accountability

Recommendation: Mandate technical environment validation sub-call within 48 hours post-kickoff
Require Assigned Project Manager to schedule 30-minute technical validation call with client IT contact to verify access credentials, test environment connectivity, and confirm integration prerequisites before first delivery work begins. Operations Manager adds this as mandatory task in ClickUp onboarding template with 48-hour due date. Success metric: Percentage of projects blocked by access issues during first delivery attempt decreases from 22% to <5%.

Recommendation: Establish backup onboarding owner protocol with bi-weekly shadowing
Designate Senior Project Manager as secondary onboarding owner; implement bi-weekly shadowing where Senior PM observes Operations Manager onboarding 1-2 clients end-to-end and executes 1 client onboarding under supervision per month. Operations Manager documents shadow schedule in shared calendar and maintains delegation runbook in Notion. Success metric: Operations Manager PTO no longer blocks new client onboarding; backup owner executes onboarding at 90% quality within first solo attempt.

Scalability & Measurement

Recommendation: Build onboarding performance dashboard in Databox connected to HubSpot and ClickUp
Create real-time dashboard tracking 5 core KPIs (time-to-kickoff, form completion rate, first deliverable on-time rate, handoff defect rate, onboarding CSAT) with weekly email summary to Operations Manager and monthly review with leadership. Operations Manager configures Databox integrations pulling HubSpot deal closure dates, ClickUp project milestones, and Typeform CSAT survey results. Success metric: Leadership gains onboarding visibility without manual reporting; Operations Manager reduces reporting prep time from 3 hours/week to zero.

Recommendation: Conduct quarterly onboarding retrospectives with cross-functional stakeholders
Schedule 90-minute quarterly sessions with Operations Manager, Delivery Lead, Sales Operations, and rotating Project Managers to review onboarding defect patterns, resource allocation accuracy, and process refinement opportunities using Miro collaborative board. Operations Manager facilitates and documents action items in shared Google Doc with 30-day implementation deadlines. Success metric: Process improvement cycle time shortens from ad-hoc/annual to systematic quarterly; implemented refinements reduce average time-to-kickoff by 1 business day over 12 months.