

Client Onboarding Workflow Template

First impressions set the tone for the entire client relationship. A great onboarding experience reduces friction, builds confidence, and dramatically reduces refunds and disputes.

Why this matters: At Certified Tech Solutions, client onboarding is fully automated inside Automation on a Mission (AOAM). The moment a client signs or pays, they receive their welcome email, intake form, and calendar invite — automatically. Clients who experience structured onboarding are 4x more likely to renew, refer, and leave reviews.

Phase 1: Pre-Onboarding

Trigger: Client signs contract or completes payment

■	Welcome Email	Personalized email confirming scope, next steps, and who to contact with questions	Immediately
■	Intake Form	Questionnaire collecting everything needed to begin work — sent via AOAM automation	Day 0
■	Contract Copy	Confirm signed contract is on file; send client their signed copy	Day 0
■	Payment Receipt	Automated receipt with payment schedule if applicable	Day 0
■	Project Brief	Internal brief created from intake responses — shared with team	Within 24h
■	Kickoff Scheduled	Calendar invite for kickoff call sent automatically via AOAM scheduling	Within 24h
■	Access Collected	Gather any logins, brand assets, or account access needed before kickoff	Before kickoff
■	Internal Setup	CRM record, project folder, and task board created in AOAM	Before kickoff

Phase 2: Kickoff (Days 1–3)

Trigger: Intake form received + kickoff call confirmed

■	Kickoff Call	Review scope, timeline, communication preferences, and success metrics	Day 1–3
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■	Define Success	Document 2–3 measurable outcomes the client defines as 'we won'	During kickoff
■	Comm Norms Set	Agree on: channel, response time, update frequency	During kickoff
■	Timeline Walk-through	Review every milestone date together — client confirms understanding	During kickoff
■	Post-Call Summary	Email recap of all decisions + who is responsible for each next step	Within 2h
■	First Deliverable	First tangible output or update within 48h of kickoff	Day 3–5

Phase 3: Active Project

Trigger: Work in progress

■	Weekly Update	Brief status email every 7 days — even if nothing major happened	Weekly
■	Milestone Alerts	Client notified proactively when each milestone hits or is approaching	At milestones
■	Proactive Flags	Any issue, delay, or scope question raised before it becomes a problem	As needed
■	Mid-Project Check-in	Scheduled call at project midpoint to review and recalibrate	Midpoint
■	Written Approvals	Explicit sign-off at every key decision point — all documented in AOAM	Decision points
■	Feedback Loop	"What's working? What would make this better?" asked every two weeks	Bi-weekly

Phase 4: Delivery & Close

Trigger: Project nearing completion

■	Final Review Call	Walk through deliverables together before marking project complete	1 week before
■	Revisions Window	Confirm revision process per contract — documented and in writing	Per contract
■	Handoff Package	Deliver all files, credentials, training docs, and how-to guides	At close
■	Final Invoice	Send if applicable; confirm all payments settled	At close
■	Completion Email	Celebrate what was built; summarize outcomes achieved	Day of close
■	Review Request	Automated ask for Google/testimonial review while experience is fresh	3 days after

■	Referral Ask	"Know anyone who could use this kind of help?" — soft, genuine	1 week after
■	90-Day Check-in	Automated follow-up to see how results are holding — opens retainer conversations	90 days later

Automating This Workflow with AOAM

Once you've run this manually twice and refined it, these are the steps CTS automates inside Automation on a Mission (AOAM) for every client:

- Welcome email + intake form — triggered by payment confirmation
- Kickoff scheduling link — sent automatically in welcome email
- Weekly update reminders — internal tasks set on project start date
- Review request — triggered 3 days after project marked complete
- 90-day check-in — scheduled automatically at project close

Ready to take the next step? CTS can build your entire onboarding workflow inside Automation on a Mission (AOAM) so every client gets a consistent, professional experience from day one — without you doing it manually. Visit ctsolutionsonline.com/contact or take the free Tech Chaos → CALM™ Survey at ctsolutionsonline.com/chaos-to-calm-score