THE WORKFLOW HOUSE

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SAMPLE STANDARD OPERATING PROCEDURE

New Customer Onboarding Process

Document ID	SOP-CS-001	**Process Owner**	Customer Experience Lead
Version	1.0	**Effective Date**	Illustrative Sample
Department	Customer Experience	**Review Cycle**	Every 6 months

ILLUSTRATIVE SAMPLE
This SOP was created by The Workflow House to demonstrate the structure, clarity, and level of detail a client can expect. It does not represent a real client or confidential business process.

1. Purpose

To provide a consistent, welcoming, and complete onboarding experience for every new customer from signed agreement through successful handoff to the service team.

2. Scope

This procedure begins when a customer agreement is confirmed and ends when the customer has received their welcome materials, required information has been collected, internal ownership is assigned, and the first service milestone is scheduled.

3. Success Standard

A new customer should never need to ask, “What happens next?” The customer receives clear expectations, the internal team has the information needed to begin work, and all onboarding activity is documented in the approved system.

4. Roles & Responsibilities

Sales/Owner: Confirms the agreement and provides the handoff details.
Customer Experience Lead: Owns onboarding, communication, documentation, and follow-up.
Service Owner: Reviews the handoff, confirms readiness, and assumes responsibility after onboarding.

5. Required Tools / Inputs

Customer agreement or approved scope; customer name and primary contact information; CRM or customer tracker; approved welcome-email template; onboarding questionnaire; shared client folder; scheduling tool, if applicable.

6. Procedure

Step 1 - Confirm the customer handoff

Within one business day of agreement confirmation, verify the customer name, primary contact, purchased service/scope, agreed start date, billing status (if relevant to activation), and any commitments made during the sales process.

Quality check: Do not send onboarding materials until the scope and primary contact are confirmed.

Step 2 - Create the customer record

Create or update the customer record in the approved CRM/tracker. Use the standard naming convention. Add the primary contact, service purchased, start date, internal owner, and a link to the customer folder.

Required result: Another team member should be able to locate the customer record and understand the current status without asking the original salesperson.

Step 3 - Create the customer folder

Create the customer folder using the standard folder template. Store the signed agreement/scope, onboarding questionnaire, customer-provided materials, and future deliverables in the appropriate subfolders. Do not store sensitive information outside approved systems.

Naming example: Customer Name - Onboarding - YYYY-MM.

Step 4 - Send the welcome message

Send the approved welcome message from the business inbox. Personalize the greeting and service name, but do not change promised timelines or deliverables without approval. Include what happens next, what the customer needs to provide, the expected response window, and the best written contact method.

Customer experience standard: Keep the message concise, friendly, and specific.

Step 5 - Collect required information

Send the onboarding questionnaire or written intake. Review the response for missing information. If anything required is incomplete, reply with one consolidated request rather than sending multiple fragmented follow-ups.

Follow-up: If no response is received within 2 business days, send the approved reminder. Escalate after the second unanswered reminder.

Step 6 - Perform internal readiness review

Confirm that the scope, customer materials, required access, key dates, and internal owner are documented. Flag any discrepancy between the agreement and customer expectations before service work begins.

Stop condition: Do not hand off an incomplete or contradictory onboarding package.

Step 7 - Handoff to the service owner

Notify the assigned service owner that onboarding is ready. Provide a concise handoff summary with the customer objective, scope, important preferences/constraints, due dates, and links to the customer record and folder.

Acceptance: The service owner confirms receipt or raises missing-information questions.

Step 8 - Close onboarding

Update the customer status to Active/Onboarding Complete, record the completion date, and send the customer a short confirmation explaining the next milestone and who will be their primary contact going forward.

Completion standard: Customer and internal owner both know what happens next.

7. Decision & Escalation Guide

Situation	Action
Customer scope differs from signed agreement	Pause onboarding and escalate to the owner/sales lead before promising changes.
Required customer information is missing	Send one consolidated written request. Follow up after 2 business days.
Customer requests an urgent start	Do not bypass required onboarding controls. Escalate for an approved exception.
Internal owner is unavailable	Assign an approved backup before marking onboarding complete.
Sensitive information is received	Move it to the approved secure system and follow the company’s data-handling policy.

8. Quality Checklist

Before closing onboarding, confirm all items below:
☐ Agreement/scope verified
☐ Customer record complete
☐ Customer folder created
☐ Welcome message sent
☐ Required customer information received
☐ Internal readiness review complete
☐ Service owner accepted handoff
☐ Customer received next-step confirmation

9. Documentation & Records

Store customer-facing communication in the approved inbox/thread and maintain process records in the approved CRM/tracker. Customer files should be stored only in the designated customer folder. Avoid duplicate versions of final documents.

10. Version Control

Version	Date	Change	Owner
1.0	Illustrative Sample	Initial sample SOP	The Workflow House