SOP: Assigned Client Manager Introduction and Kickoff Scheduling

This SOP details the process for **assigned client manager introduction and kickoff scheduling**, including the initial client manager assignment, introduction protocols, scheduling of kickoff meetings, preparation of meeting agendas, and communication guidelines. The purpose is to ensure a smooth and professional client onboarding experience, establish clear expectations, and foster strong client-manager relationships from the outset.

Purpose

To outline steps for introducing the assigned client manager to clients and effectively scheduling and preparing for kickoff meetings.

Scope

This SOP applies to all new client onboarding engagements and existing client handoffs.

Responsibilities

- **Account Director:** Assigns client manager and oversees process.
- **Assigned Client Manager:** Coordinates introduction, scheduling, and preparation activities.
- **Administrative Support:** Assists with scheduling and documentation.

Procedure

1. **Client Manager Assignment**
    - Account Director reviews new client portfolio and designates a client manager within 1 business day of contract signing.
    - Document the assignment in the client onboarding tracker.
2. **Internal Preparation & Handover**
    - Account Director conducts a handover meeting with the assigned client manager to review client background, expectations, and project objectives.
    - Compile relevant documents (contracts, proposals, briefs) into a shared folder.
3. **Client Introduction Communication**
    - Assigned client manager sends a personalized introduction email within 24 hours of assignment, cc'ing key internal and client stakeholders.
    - Include manager bio, contact info, and high-level overview of next steps.
4. **Kickoff Meeting Scheduling**
    - Propose kickoff meeting dates/times accommodating client preferences (minimum 3 options).
    - Send calendar invitation once confirmed, including dial-in/virtual meeting details.
5. **Kickoff Meeting Agenda Preparation**
    - Prepare and circulate an agenda at least 2 business days prior to the meeting, covering:
        - Introductions
        - Project scope & objectives
        - Roles & responsibilities
        - Deliverables & timelines
        - Communication expectations
        - Q&A
6. **Kickoff Meeting Execution & Follow-up**
    - Conduct the meeting following agenda; document key decisions and action items.
    - Send meeting minutes and next steps within 1 business day.
    - Update onboarding tracker with meeting outcome and client feedback.

Templates & Resources

Template/Resource	Description	Location
Client Manager Introduction Email	Template for introducing assigned manager to client.	/Templates/Client_Introduction_Email.docx

Kickoff Meeting Agenda	Standard agenda outline for kickoff meetings.	/Templates/Kickoff_Agenda.docx
Onboarding Tracker	Spreadsheet for tracking onboarding tasks and milestones.	/Shared/Onboarding_Tracker.xlsx

Communication Guidelines

- Always use professional, clear, and concise language.
- Include all relevant stakeholders on key communications.
- Respond to client inquiries within 1 business day.

Review & Revision

This SOP should be reviewed annually or as business processes evolve.

Last updated: