SOP Template: Client Onboarding and Needs Assessment

This SOP details the process for **client onboarding and needs assessment**, covering initial client contact, information gathering, requirement analysis, goal setting, and documentation. It aims to establish clear communication, understand client expectations, and tailor services to meet specific needs, ensuring a smooth onboarding experience and a foundation for successful client relationships.

1. Purpose

To outline the standardized process for onboarding new clients and assessing their needs, ensuring consistent service delivery and high client satisfaction.

2. Scope

This procedure applies to all client-facing teams responsible for new client intake, account management, and project initiation.

3. Responsibilities

- **Client Onboarding Specialist / Account Manager:** Responsible for guiding the client through the onboarding process and conducting needs assessments.
- **Documentation Team:** Ensures all client information and requirements are accurately documented and stored securely.
- **Project/Service Delivery Team:** Reviews onboarding documentation to deliver tailored solutions.

4. Procedure

1. **Initial Client Contact**
    - Receive inquiry or referral from prospective client.
    - Acknowledge receipt and schedule an introductory call or meeting.
2. **Information Gathering**
    - Collect basic client information (company name, contact details, industry, existing solutions, etc.).
    - Send and obtain completed client intake form if applicable.
3. **Needs Assessment**
    - Conduct an in-depth discussion to understand client goals, challenges, and expectations.
    - Identify key pain points, desired outcomes, and success metrics.
    - Clarify timelines, budget constraints, and decision makers.
4. **Goal Setting & Requirement Analysis**
    - Define project/service objectives collaboratively with the client.
    - Document agreed-upon deliverables, milestones, and KPIs.
5. **Documentation & Confirmation**
    - Summarize call/meeting discussions and action points.
    - Send summary to the client for confirmation and make necessary revisions.
    - Store all onboarding documents securely and ensure accessibility for relevant teams.
6. **Transition to Service/Project Delivery**
    - Introduce the project/service delivery team to the client.
    - Conduct an internal handoff, reviewing all onboarding materials.
    - Officially commence service delivery per agreed-upon plan.

5. Documentation & Records

Document	Owner	Location	Retention
Client Intake/Onboarding Form	Account Manager	CRM/Document Management System	Active client + 2 years
Needs Assessment Summary	Account Manager	CRM/Project Folder	Project lifecycle + 2 years
Communication Records	Account Manager	Email/CRM	Project lifecycle + 2 years

6. Review & Continuous Improvement

1. Collect client feedback post-onboarding to identify process gaps.
2. Update SOP annually based on team suggestions and feedback trends.

> **Note:** Ensure all client data is managed according to applicable privacy laws and internal data protection policies.