SOP: Initial Client Communication and Welcome Kit Distribution

This SOP details the process for **initial client communication and welcome kit distribution**, covering the steps for promptly reaching out to new clients, introducing company services, addressing initial inquiries, and providing a comprehensive welcome kit. The objective is to ensure a positive first impression, establish clear communication channels, and equip clients with essential information and materials to facilitate a smooth onboarding experience.

Scope

This SOP applies to all new clients onboarded by the company and the staff responsible for client communications and onboarding.

Responsibility

- **Client Relationship Manager (CRM):** Initiates first contact, sends welcome kit, and serves as the main point of contact.
- **Onboarding Team:** Supports CRM in preparing materials and answering initial client questions.

Procedure

1. **Receive New Client Details**
   Ensure all relevant client information (name, company, contact details, services/products engaged) is received from the sales/account team.
2. **Initiate First Contact**
   - Within 24 business hours, send a personalized welcome email or make a phone call to the client contact.
   - Introduce the CRM as the main point of contact.
   - Briefly outline next steps and what the client can expect during onboarding.
3. **Introduce Company Services**
   - Provide a concise summary of the services/products relevant to the client.
   - Share links to company resources and service catalogs, as appropriate.
4. **Address Initial Inquiries**
   - Invite the client to ask any immediate questions or express specific needs.
   - Ensure timely responses to any queries within 24 hours.
5. **Prepare and Distribute Welcome Kit**
   - Compile a digital or physical welcome kit, which may include:
     - Welcome letter
     - Company overview & contact info
     - User guides or onboarding checklists
     - FAQs and policy documents
     - Access credentials, if applicable
   - Send the welcome kit to the client within 2 business days of initial contact.
6. **Confirm Receipt and Offer Support**
   - Follow up to confirm the client received the welcome kit.
   - Offer a brief orientation call or meeting if needed.
7. **Document Communication**
   - Log all client communications and delivery of materials in the CRM or designated tracking system.

Timeline Overview

Step	Responsible	Timeline
Receive client details	CRM/Onboarding Team	Day 1
Initiate first contact	CRM	Within 1 business day
Distribute welcome kit	CRM/Onboarding Team	Within 2 business days
Follow-up & support	CRM	Within 3 business days

Related Documents

- Welcome Email Template
- Welcome Kit Checklist
- Onboarding FAQ
- CRM Communication Log Guide

Revision History

Version	Date	Description	Owner
1.0	2024-06-06	Initial SOP release	SOP Admin