Standard Operating Procedure (SOP): Client Orientation and Welcome Training Session

This SOP describes the process for conducting a **client orientation and welcome training session**, including an introduction to company policies, overview of services and products, client roles and responsibilities, communication protocols, and available support resources. The goal is to ensure new clients receive comprehensive information, feel welcomed, and are prepared for a successful partnership with clear expectations and support channels.

1. Purpose

To guide staff in conducting standardized orientation sessions for new clients, ensuring clarity, professionalism, and consistency in communication and service delivery.

2. Scope

This SOP applies to all onboarding staff responsible for welcoming and orienting new clients.

3. Responsibilities

- **Onboarding Specialist:** Prepares and delivers orientation session, records attendance, and provides necessary documentation.
- **Account Manager:** Supports orientation by providing client-specific information and answering advanced queries.
- **Training Coordinator:** Ensures training materials are up-to-date and relevant.

4. Procedure

1. **Preparation**
    - Schedule a session with the client within 3 business days of contract start.
    - Prepare the orientation materials (slide deck, handouts, company policies, FAQs).
    - Send an agenda and meeting invite to the client.
2. **Session Introduction**
    - Welcome the client and introduce all attendees and their roles.
    - Present session agenda and objectives.
3. **Overview of Company Policies**
    - Summarize key company policies relevant to the client (e.g., data privacy, confidentiality, billing).
    - Provide links or hard copies as required.
4. **Overview of Services and Products**
    - Present main services/products, emphasizing those pertinent to the client.
    - Demonstrate usage or access, if applicable.
5. **Client Roles and Responsibilities**
    - Outline the client's role in the partnership.
    - Clarify mutual expectations for engagement, deliverables, and communication.
6. **Communication Protocols**
    - Introduce main points of contact and escalation paths.
    - Explain communication channels (email, phone, support portal, etc.).
    - Share response time expectations and working hours.

7. **Support Resources**
    - Highlight available resources (help desk, knowledge base, training materials).
    - Explain how to request additional help or training.
8. **Q&A and Feedback**
    - Encourage questions to clarify any points.
    - Collect feedback on the orientation session for future improvement.
9. **Wrap-Up and Next Steps**
    - Review key points and provide contact information.
    - Share summary email with attendees, including relevant resources and action items.
    - Document session completion in CRM or onboarding platform.

5. Documentation

- Sign-in sheet or digital record of attendance
- Copy of all training materials provided
- Summary email and action items
- Recorded feedback/comments

6. Review and Updates

The Training Coordinator shall review this SOP annually or when critical updates to company policy, services, or processes occur.

7. Appendix

Document	Description
Orientation Slide Deck	Visual aid used during client orientation session
Client Welcome Packet	All relevant documents, policies, and support contacts
Feedback Form	Template for gathering session feedback

Note: All client information provided during the session must be treated as confidential and handled according to company privacy protocols.