MPC New Client Onboarding Checklist

Proper Client Onboarding transfers the social capital and trust from the sales team to the account exec. It's important the MPC Crew follows this onboarding process every time for a smooth transition that sets the account up for long-term success. Really good onboarding eliminates scope creep too. Yeah!

Client Paperwork

- Sales lead to get signed contract or estimate
- Sales lead to send signed contract to controller and operations director
- Controller to save contract 2025 contracts folder that is shared with operations director and president on Dropbox
- MPC operations director to create client folder on MPC Dropbox in the current year MPC Clients section
- MPC Operations Director to set up MPC team for client account, and notify all team members of their roles
- Add Client sales and contact info into Quickbooks (Controller) and teamwork (Sales Lead)
- Sales lead that landed account to fill in Client Brief Form. This will go on Dropbox in the client folder.
- Create and send first invoice for deposit within 24 hours of contract signing

Add New Client to teamwork (Project Mgt Software)

- Operations director to create new project in teamwork Project Manager
- Upload onboarding template to account
- Review tasks and delete tasks that do not apply to client

Start Onboarding

- Start "On-boarding" stage in teamwork
- Account lead to send welcome email with credentials request

Input information into systems

- Account lead to create Google alert
- Connect with all clients on LinkedIn, IG, FB and X

Account Creation

- Account Manager to take Scope of Work from Proposal/Contract or Estimate and build out first month in teamwork in one of these paths:
    - Multi-month or annual PR or marketing program:
        - Set information gathering meeting and provide client with a list of needed assets including logo files.
        - Include plan with goal, measurable objectives, strategies and tactics as a deliverable for the first month
    - Project Estimate:
        - Add all deliverables from estimate into teamwork
        - Assign each project to team members with accurate time estimates and deadlines

  **Kirsten—Can you create a template for new clients that can be replicated in teamwork?
- Account lead to fill in remaining details in Client Brief form
- Account lead to call client and fill in intake form on their behalf
- Account lead to send welcome email to client that introduces the team

Client Kickoff Call

- Schedule call
- Conduct a call
- Post client Kickoff call account lead to send an and we're off email to client and copy MPC account team