

Client Onboarding Packet

Welcome Guide, Timeline, Access Forms & Communication Plan

Welcome to [Your Company]!

Congratulations on taking the first step toward automating your business with AI. This packet contains everything you need to get started.

What Happens Next

When	Phase	What Happens
Day 1-2	Kickoff Call	We'll meet for 30-45 minutes to align on goals, timeline, and communication plan.
Day 3-5	Discovery & Audit	We analyze your current processes and identify the highest-impact automation opportunities.
Week 2	Build Phase Begins	We start building your custom AI solution with weekly progress updates.
Week 3-4	Testing & Launch	You review the solution, we iterate, and go live.
Ongoing	Support & Optimization	Monthly check-ins to optimize performance and explore new opportunities.

Access Request Form

Please provide the following access so we can get started:

- Website admin access (URL, username, password)
- CRM login (if applicable)
- Current chatbot or automation tool access
- Brand guidelines (logo, colors, tone of voice)
- FAQ document or knowledge base
- Sample customer inquiries (10-20 examples)

Communication Guidelines

- Primary contact: [Your name] - [Your email]
- Response time: Within 24 hours on business days
- Weekly updates: Every [day] via [email/Slack/Loom]
- Urgent issues: [Phone number] - response within 2 hours
- Project management: All tasks tracked in [tool - e.g., Notion, Trello]

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