New client onboarding for an agency or consultancy

Manual | 12 steps | 3 roles | Created Sep 2, 2026 | Updated Sep 2, 2026 | v1

How an agency or consultancy takes a newly signed client from contract to first deliverable without the account team improvising it.

TRIGGER

When a client returns a signed contract or statement of work.

12 STEPS

1. **Account Manager confirms the signed contract is countersigned and filed, and records the agreed scope, fee, and start date in the client record.**

   Within one working day of receipt

   Do not begin any work before this step is complete. Starting early is the most common cause of unpaid scope on a first engagement.

2. **Finance creates the client billing record and issues the first invoice per the contract terms.**

   Collect purchase order requirements and the correct invoicing email now. Discovering a PO requirement at payment time delays cash by a full billing cycle.

3. **Account Manager sends the onboarding request covering everything needed to begin: access, brand assets, named contacts, and the approval chain.**

   One consolidated request with a deadline, not a series of separate asks. State explicitly what cannot start until each item arrives.

4. **Account Manager checks whether all requested items have been received by the stated deadline.**

   All received: Go to step 6: Delivery Lead reviews the scope and produces a delivery plan with milestone dates.
   Items missing: Go to step 5: Account Manager notifies the client in writing which items are outstanding and what the delivery impact is, then returns to the check.

5. **Account Manager notifies the client in writing which items are outstanding and what the delivery impact is, then returns to the check.**

   Written, and naming the specific consequence. This is what protects the timeline later, and it needs to exist before the deadline slips rather than after.

   Items now received: Go to step 6: Delivery Lead reviews the scope and produces a delivery plan with milestone dates.
   Still outstanding after one week: Go to step 12: Account Manager escalates internally to agree whether to proceed on a reduced scope, pause, or formally revise the timeline.

6. **Delivery Lead reviews the scope and produces a delivery plan with milestone dates.**

   Flag any part of the signed scope that is not deliverable as written, now rather than at the first milestone.

7 **Account Manager schedules the kickoff with every required decision-maker on the invitation.**

Within five working days of the signed contract

A kickoff without the person who approves work is a meeting you will hold twice.

8 **Delivery Lead runs the kickoff, walking through scope, milestones, the approval process, and who to contact for what.**

9 **Account Manager circulates written notes confirming what was agreed, including anything that changed during the kickoff.**

Within one working day of the kickoff

Scope changes agreed verbally in a kickoff and never written down are the single biggest source of later disputes.

10 **Delivery Lead confirms the team has the access and assets needed and begins the first milestone.**

11 **Account Manager holds a check-in at the two-week mark to confirm the client is satisfied with communication and pace.**

Two weeks after work begins

Early enough to fix a mismatch in expectations while it is still cheap.

On track: Ends the procedure
Concerns raised: Go to step 6: Delivery Lead reviews the scope and produces a delivery plan with milestone dates.

12 **Account Manager escalates internally to agree whether to proceed on a reduced scope, pause, or formally revise the timeline.**

Reached when onboarding items are still outstanding a week past the deadline. The decision needs an owner rather than being allowed to drift.

Proceed on reduced scope: Go to step 6: Delivery Lead reviews the scope and produces a delivery plan with milestone dates.
Pause until items received: Go to step 5: Account Manager notifies the client in writing which items are outstanding and what the delivery impact is, then returns to the check.

ROLES INVOLVED

Account Manager | Delivery Lead | Finance

REVIEW CADENCE

Twice yearly, and after any engagement where onboarding went badly. A post-mortem on a bad onboarding is the best source of edits to this document.

Name the person accountable for this procedure before you put it into use.

CHANGE THESE BEFORE YOU USE IT

- Replace the onboarding request in step 3 with your actual list of required access, assets, and contacts.
- Adjust the invoicing point in step 2 to match your standard terms, whether that is on signature, on kickoff, or in arrears.
- If you white-label deliverables for clients, add the branding setup as an explicit step rather than assuming it.
- Set the escalation window in step 5 to whatever your delivery model can actually absorb.

This is a free starting point from sendabrief.com, not compliance advice. It is written to be adapted.

Source: https://sendabrief.com/templates/new-client-onboarding