This sample SOP demonstrates my approach to structured client onboarding in a remote work environment. It reflects my experience in HR administration and operations support.

SOP – New Client Onboarding Process

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1. Purpose

To ensure all new clients are onboarded in a structured, timely, and professional manner.

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2. Scope

This SOP applies to all new clients after contract confirmation.

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3. Responsibilities

Admin Support is responsible for:

- Sending welcome communication
- Collecting required documents
- Setting up internal tracking
- Scheduling initial meeting

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4. Procedure

Step 1 – Confirm Client Details

- Verify signed agreement is received.
- Confirm client's primary contact person and email address.

Step 2 – Send Welcome Email

- Send standardized welcome email template within 24 hours.
- Attach onboarding checklist.
- Request required documents (ID, business details, project brief, etc.).

Step 3 – Create Client Folder

- Create a dedicated folder in Google Drive.
- Name format: "Client Name – Year – Project Type".
- Upload contract and initial documents.

Step 4 – Update Tracking Sheet

- Add client to Master Client Tracker.
- Record start date, assigned team member, and status.

Step 5 – Schedule Kick off Meeting

- Coordinate available time slots.
- Send calendar invitation with meeting agenda.
- Confirm attendance 24 hours before meeting.

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5. Expected Outcome

- All required documents collected.
- Internal tracking updated.
- Kick off meeting successfully scheduled.