

Client onboarding and scoping

Automates client onboarding from deal closure through project kickoff by syncing client data, creating project structures, and sending standardized onboarding materials. Reduces onboarding time by 60% and ensures consistent project setup across all engagements.

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Get Your Blueprint

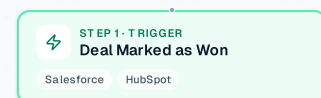


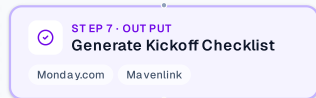
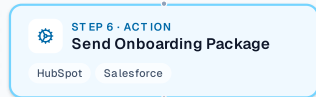
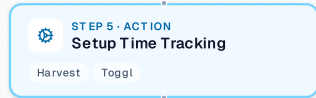
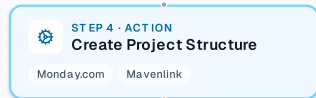
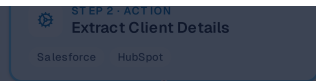
WORKFLOW TRIGGER

Deal status changes to 'Closed Won' in Salesforce or HubSpot

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

Deal Marked as Won

A new client deal is marked as closed/won in the CRM system. This triggers the automated onboarding sequence to begin immediately.

Salesforce

HubSpot

2

 ACTION

Extract Client Details

Pulls client contact information, project scope, timeline, and budget from the deal record. Maps data fields for downstream system integration.

Salesforce

HubSpot

3

 DECISION

Check Project Complexity

Evaluates deal value and service type to determine if this is a standard engagement or complex project requiring custom setup. Routes to appropriate onboarding path.

4

 ACTION

Create Project Structure

Automatically sets up project workspace with appropriate templates, milestones, and team assignments. Configures time tracking categories based on service type.

Monday.com

Mavenlink

5

Setup Time Tracking

Creates client-specific time tracking projects with correct billing rates and team member access. Establishes budget tracking against approved scope.

Harvest

Toggl

6

⚙️ ACTION

Send Onboarding Package

Dispatches personalized welcome email with project portal access, document requests, and kickoff meeting scheduling link. Includes service-specific questionnaires.

HubSpot

Salesforce

7

📄 OUTPUT

Generate Kickoff Checklist

Creates a comprehensive project kickoff checklist for the account manager with all setup tasks completed and client deliverables tracked. Schedules follow-up reminders.

Monday.com

Mavenlink



Outputs

- Fully configured project workspace
- Active time tracking setup
- Client onboarding package delivered
- Project kickoff checklist



Key Metrics

- Time to project start
- Onboarding completion rate
- Client satisfaction score



Tools & Integrations

- Salesforce
- HubSpot
- Monday.com
- Mavenlink
- Harvest
- Toggl

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