SOP TEMPLATE / VERSION 1.1

Service Client Onboarding SOP

Turn an agreed service scope into an owned first visit with confirmed access, standards and communication.

Library resource updated 2026-10-28. Assign your own approved document version and effective date.

Document control

Organization and site _____

Document ID and approved version _____ Effective date _____

Process owner Operations lead Assigned person _____

Reviewer and approver _____ Next review _____

Purpose and boundary

Give a newly acquired service client an accurate first delivery by transferring the agreed scope, setup requirements and communication responsibilities to operations.

From a signed or otherwise approved service agreement to the first delivery review. Excludes sales negotiation, legal drafting, payment collection and unsolicited marketing enrollment.

Responsibilities and preparation

- Account owner: transfers the agreed offer and client expectations.
- Coordinator: confirms setup and schedules the first delivery.
- Delivery lead: accepts the scope and reports gaps.

Have ready Approved agreement or service scope; Client setup form and secure contact record; First-visit checklist and escalation directory

Adapt before use

- Define which agreement fields operations needs.
- Set who approves scope changes and client communications.
- Choose secure storage for access details and contact data.
- Set the first-review timing and internal readiness requirements.

Pilot the adapted method with authorized personnel. Resolve gaps and record approval before independent use. This resource is not a certification or technical authorization.

Worked example

Example only: A new office client expects an extra storage room to be cleaned, but it is excluded from the signed scope. Operations records the mismatch. The account owner resolves it through the approved scope-change process before the first appointment is confirmed.

Procedure steps 1 to 4

01 Confirm the agreed service

Read the approved scope, schedule and exclusions. Identify any promise that cannot be traced to the agreement and clarify it with the account owner.

Acceptance check: Operations has one agreed scope reference.

Record: Agreement version and unresolved promise.

02 Create the operational record

Enter site, authorized contact, schedule and relevant delivery requirements. Collect only information needed for the service; keep sensitive access credentials in the approved secure system.

Acceptance check: Required setup fields are complete without unnecessary data.

Record: Client reference, contact role and setup status.

03 Agree the success standard

Confirm how the client and team will judge the first delivery. Link the site checklist or reference standard and document approved exclusions.

Acceptance check: Team and client contact share a specific delivery standard.

Record: Checklist version and agreed acceptance criteria.

04 Confirm access and dependencies

Verify site access permission, available service window and client-supplied prerequisites. Do not assume a sales handoff message grants access.

Acceptance check: Dependencies are confirmed or have an owner and deadline.

Record: Access process, prerequisite and blocker owner.

Complete the procedure

05 Brief the delivery lead

Review the scope, standards, access and escalation route. Ask the delivery lead to confirm understanding and raise capacity or equipment gaps before scheduling is final.

Acceptance check: Delivery lead accepts a feasible first-visit scope.

Record: Briefing date, acknowledgment and gaps.

06 Send the first-visit confirmation

Tell the authorized client contact the appointment, included work and next communication point. Use the approved transactional channel; do not subscribe them to unrelated promotions.

Acceptance check: Client has an accurate confirmation and contact route.

Record: Confirmation, recipient role and sent date.

07 Review the first delivery

Compare the report with the agreed standard, assign corrections and record any approved scope change. Close onboarding only when open actions have owners and the ongoing contact is clear.

Acceptance check: First-review decision is supported by the visit record.

Record: Review result, open actions and ongoing owner.

Exceptions and escalation

Sales promise conflicts with delivery capacity

Escalate to the account owner for a written resolution before confirming an impossible visit.

Client wants additional work

Route it through scope-change approval rather than quietly adding it to the first visit.

Required access is not ready

Mark onboarding blocked and assign the person who will resolve access.

Working record and review

Complete this record for an actual use. Keep supporting evidence in your approved system; exclude passwords, access codes and unnecessary personal details.

RECORD FIELD	ENTRY
Job or session reference	
Date and location	
Outcome and limitations	
Open action and next owner	
Target date and recheck result	
Prepared and reviewed by	

Final checks

- The delivery team uses the approved scope.
- No credential is placed in a public guide or reusable video.
- First-review findings create owned corrections rather than vague feedback.

Show the approved method

- Walk through a fictional client handoff and site checklist.
- Show a scope mismatch and the approved clarification route.
- Record only dummy contact records and conceal access details.

Record with permission, use dummy records and remove private details. Review any generated draft against the demonstration before team use. Check current access and video limits at vid2sop.com.

Template source: https://vid2sop.com/sop-templates/service-client-onboarding-sop/

Background references provide context, not endorsement: https://www.yardibreeze.com/blog/2025/10/free-standard-operating-procedure-template-property-managers/

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