HR CONSULTANCY LAUNCH PROGRAMME · ONBOARD YOUR FIRST CLIENT

New client onboarding pack

The sequence that has to be finished before a client counts as "started". The engagement terms and data agreement are regulated: this is a signpost, not advice.

01 Signed and in place before any work (regulated, signpost only)

The engagement terms (Module 4) and the data agreement (Module 3) set the legal boundary. This lists what must be signed before you begin, not what to put in them.

- [ ] Send your engagement terms (Module 4) and get them signed by e-signature (Module 5).
- [ ] Send your data-processing agreement (Module 3) and get it signed the same way.
- [ ] Keep the signed copies dated and stored, so the record exists before day one.

02 Scope on record

What is in, what is out, and what you would refer out (Modules 1 and 4).

- [ ] Confirm the scope of work in writing, so both sides agree what is included.
- [ ] Flag anything you would refer out, like litigation, in the same note.

03 Client information, collected securely

- [ ] Collect the client's HR information into your portal (Module 7), not by loose email.
- [ ] Take only what the work needs (data minimisation, Module 3).

04 Expectations set

- [ ] Agree timelines, the points of contact, and how you will communicate.
- [ ] Only mark the client "started" once every line above is done.

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Want a portal that runs onboarding for you?

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