# Onboarding Workflow

*Please revert to this workflow after a new order has been placed by a client.*
*For more insight, see Google doc.*

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## Onboarding Set Up Process

On call with the new client, look through the Onboarding form they filled, clarify and align on how exactly they want you to support them, ask questions to understand their expectations. If their plan includes social media management; ask questions to understand their goal for their page, the call to actions they want to deploy, the aesthetic look of the page; what transitions they prefer, videos, pictures etc.

## During the Onboarding Call

On call with the new client, look through the Onboarding form they filled, clarify and align on how exactly they want you to support them, ask questions to understand their expectations. If their plan includes social media management; ask questions to understand their goal for their page, the call to actions they want to deploy, the aesthetic look of the page; what transitions they prefer, videos, pictures etc.

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## Systems setup (if social media management is required)

During the onboarding call, the client will most likely have filled in their handles to Social media. We set up their Cloud Campaign and Asana and request access to their Canva Account (if they have one).

## Offboarding process

When a clients subscription has ended and they would like to close their account, an email should be sent highlighting all tasks left outstanding, links to curated content, links to Google drives or docs or any other file that has been curated or managed so it's a seamless handover.

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## Feedback/Review request

At the end of the Offboarding, you can request for feedback/review from the client. This will help improve our general operating process

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