

Make client onboarding ready before work starts

New work starts with missing approvals, unclear owners and documents spread across inboxes and shared folders.

ACCOUNTABLE OWNER

Client services lead or onboarding coordinator

Five-step controlled trial

1. Choose one service line

Use three completed or simulated onboarding files from one service line. Define what ready-to-start means first.

2. Build a readiness checklist

List the required agreement, scope confirmation, contact owner, access, key dates, risk flag and internal handoff.

3. Draft the gap view

Use AI to classify supplied records as present, missing, unclear or needs review. Cite the source and mark absence UNKNOWN.

4. Confirm the start decision

The client services lead decides whether work starts, pauses or needs an exception. No access is granted automatically.

5. Review the first month

Measure first-review readiness, late starts, rework, exceptions and time from agreement to accountable start decision.

Use synthetic or de-identified information in an organisation-approved tool. Keep sends, approvals and system changes outside the trial until a person authorises them.

A practical test you can run

Starter prompt

Using only the onboarding records below, produce a readiness register: required item, status PRESENT/MISSING/UNCLEAR/REVIEW, source, owner, explicit due date, risk flag and next action. Mark absence UNKNOWN. Do not infer approval, grant access, contact the client or change records.

Synthetic worked example

Synthetic file: signed proposal is present; access is to be finalised after kickoff; no internal owner is recorded. Expected: access is UNCLEAR, owner is MISSING and the file is not ready until reviewed.

Measure before and after

First-review readiness; time to start decision; missing-item rework; exceptions; starts delayed by preventable gaps. Report project count separately from quality.

Trial worksheet

Workflow / segment	
Owner and reviewer	
Baseline result	
Trial result	
Errors / exceptions	
Decision: stop, revise or expand	

Stop condition

Stop if a draft treats an unclear record as approval, exposes client data in an unapproved tool, creates access automatically or bypasses the accountable decision.

Need a system around this workflow?

[Discuss a scoped workflow diagnostic with Aqi360](#)

This guide prepares a controlled trial. A paid diagnostic, delivery scope, integrations and pricing are agreed separately.