

SOP 1: New Client Onboarding & Billing

Effective for all new client contracts

1. A signed contract triggers a welcome email within 1 business day, cc'ing the account lead.
2. New clients are billed via retainer, invoiced on the 1st of each month for the month ahead — not billed in arrears.
3. The first invoice is prorated to the contract start date and due within 15 days of signing, before any deliverable work begins.
4. Set up the client folder in the shared drive using the naming convention [ClientName]_[Year], and create a project in the project management tool before any work starts.
5. The account lead schedules a 30-minute kickoff call within the first week.