

A clearer start for every client

A four-week onboarding pilot

Operations proposal / September 2026

The decision

Run a four-week pilot with one client cohort

One accountable owner. One shared intake.
A clear definition of “ready to start.”

PROPOSED SCOPE / 6 NEW CLIENTS

The starting point

12

business days

Illustrative end-to-end baseline

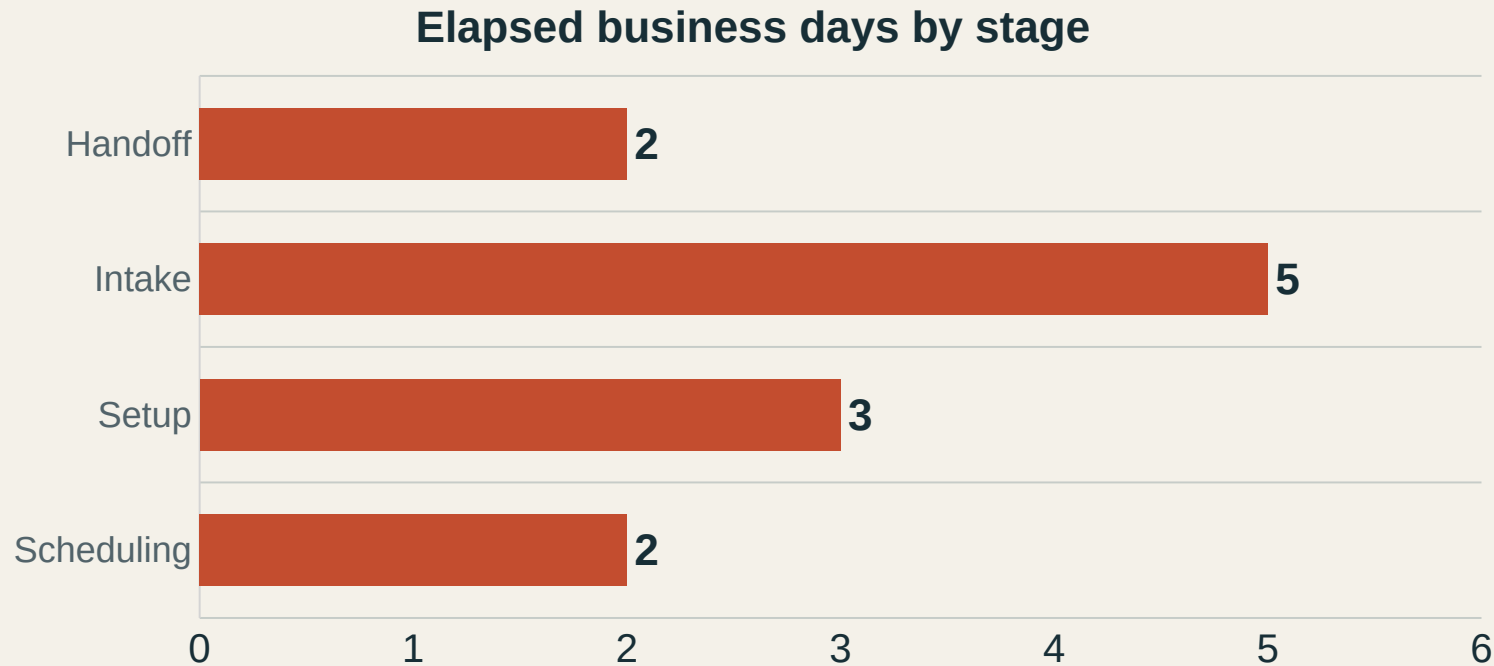
Intake arrives in fragments

Client details are collected in separate messages and documents.

Ownership changes midstream

Sales and delivery have no shared acceptance checklist.

Intake is the largest delay



5 of 12

business days are
spent in intake

Pilot priority:
collect complete inputs
before setup begins

Three changes to test

01

Name one owner

One accountable owner,
from scope through kickoff.

02

Collect once

Use one intake form and
one shared client record.

03

Agree on readiness

Define the inputs that must
be complete before setup.

A clear owner at every stage

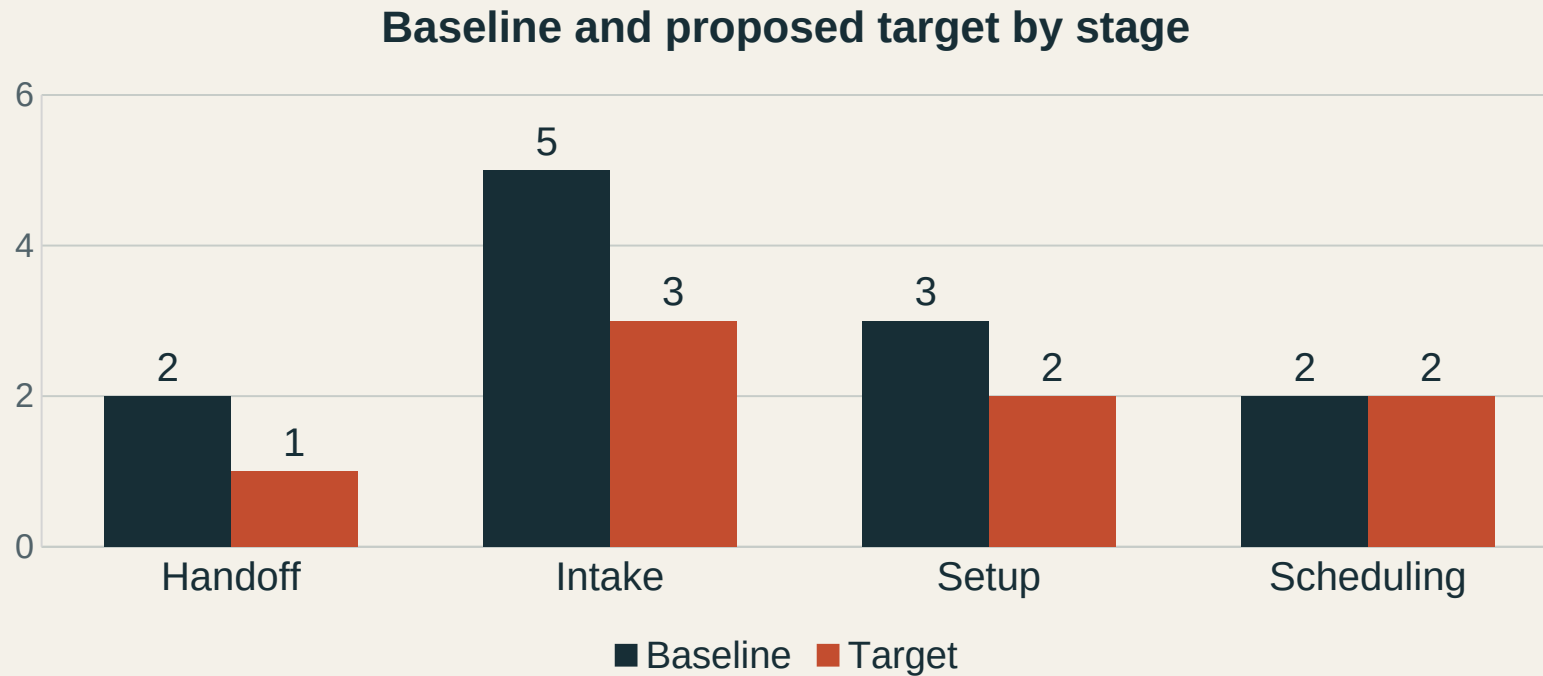
STAGE	ACCOUNTABLE OWNER	EXIT CONDITION
01 Handoff	Account lead	Confirm scope and introduction
02 Intake	Onboarding owner	Accept a complete client brief
03 Setup	Delivery lead	Prepare access and workspace
04 Scheduling	Onboarding owner	Confirm kickoff and agenda

Four weeks, with a decision at the end

Week 1	Prepare	Confirm owners, baseline and intake form
Week 2	Launch	Start the pilot with the first clients
Week 3	Adjust	Review blockers and simplify the handoff
Week 4	Decide	Assess the cohort and agree the next step

Pilot assumption: six clients can begin and complete onboarding during the test.

The target: four fewer business days



12 → 8

business days
end to end

A target to test,
not a measured result

Illustrative stage durations are sequential and sum to the total; targets are not forecasts.

Pilot success criteria

Measure	Proposed threshold	How to check
Elapsed time	Median $\leq$ 8 business days	Signed scope → kickoff
Intake completeness	At least 5 of 6 clients	Complete before setup starts
Client experience	No major unresolved blocker	Owner review at kickoff

Use the six-client pilot to assess feasibility; a larger cohort is needed to validate impact.

Ready to test a clearer start?

Confirm three things

An executive sponsor

An onboarding owner

The six-client pilot cohort