

Client Onboarding and Admin Support Briefing

This guide is designed to help you spot tasks that can be handed over to a VA, what Jessanol would usually need from you, and what the end result could look like.

HOW THIS HELPS

Client onboarding often involves more admin than people expect. There may be emails, forms, folders, invoices, booking details, signed documents, reminders, welcome information and project setup. When those steps are scattered, things can feel clunky for both you and the client.

Jessanol can help manage the admin around bringing new clients, learners, suppliers or projects into the business smoothly.

THIS IS USEFUL IF

This type of support may be useful if:

- New client setup involves several steps
- You are manually chasing forms, payments or missing information
- You want clients to receive a clearer welcome
- You need folders, records or project areas set up consistently
- Important onboarding steps currently live in your head
- You want someone to track what has and has not been completed
- You are worried that small details may be missed before work begins

WHAT JESSANOL CAN SUPPORT WITH

Jessanol can help with the admin around onboarding clients, learners, suppliers or projects.

This may include:

- Sending agreed onboarding emails
- Creating client folders
- Updating CRM or contact records
- Tracking signed forms, booking details or terms
- Setting up project admin
- Scheduling calls or reminders
- Checking that key information has been received and saved
- Following up on missing information

RECOMMENDED RHYTHM

This is usually done whenever a new client, learner, supplier or project is set up.

For example:

- As part of every new client onboarding
- Before a project begins
- After a proposal or quote is accepted
- When setting up a new learner, supplier or partner
- During a launch or busy period with several people to onboard

ACCESS LIKELY NEEDED

Jessanol will probably need:

- Access to agreed forms, templates or onboarding documents
- Access to CRM, email, calendar, folders or proposal systems
- Details of your onboarding process
- Copies of standard wording or welcome emails
- Details of what must be completed before work starts
- Guidance on where documents should be saved
- Guidance on what should be followed up and when

IMPORTANT CONSIDERATIONS

Before starting, we will agree:

- Which steps must happen before work begins
- Which documents need to be signed, completed or paid
- Which email templates or wording should be used
- What Jessanol can send directly
- What needs approval first
- How missing information should be followed up
- Where client information should be stored

Client information should be organised and stored securely. Missing information should be followed up clearly and politely.

STEP-BY-STEP INSTRUCTIONS

1. Confirm that a new client, learner, supplier or project is ready to be onboarded.
2. Create or update the relevant record in the agreed system.
3. Set up the agreed folder structure.
4. Send the correct onboarding email or documents.
5. Track forms, signatures, payments or missing information.
6. Schedule any agreed calls, reminders or follow-ups.
7. Save all relevant documents in the correct location.
8. Update the CRM, tracker or project area.
9. Flag any missing information or next steps

WHAT YOU NEED TO PROVIDE

To get started, you will usually need to provide:

- The trigger for starting onboarding
- Details of the client, learner, supplier or project
- Any templates, forms, terms or welcome documents
- Access to the relevant systems or folders
- A list of what must be completed before work starts
- Any wording preferences for follow-up emails
- Details of who needs to be kept updated

If your onboarding process is not fully documented yet, Jessanol can help map it as part of the work.

WHAT YOU'LL GET BACK

You should have:

- A clearer onboarding process
- Better tracking of forms, signatures, payments or missing details
- More consistent communication
- Properly set up folders and records
- Fewer last-minute admin gaps
- A smoother experience for you and the person being onboarded

If this sounds familiar, we can use this as a starting point to work out what support would be most useful. Contact me: jane@jessanol.com