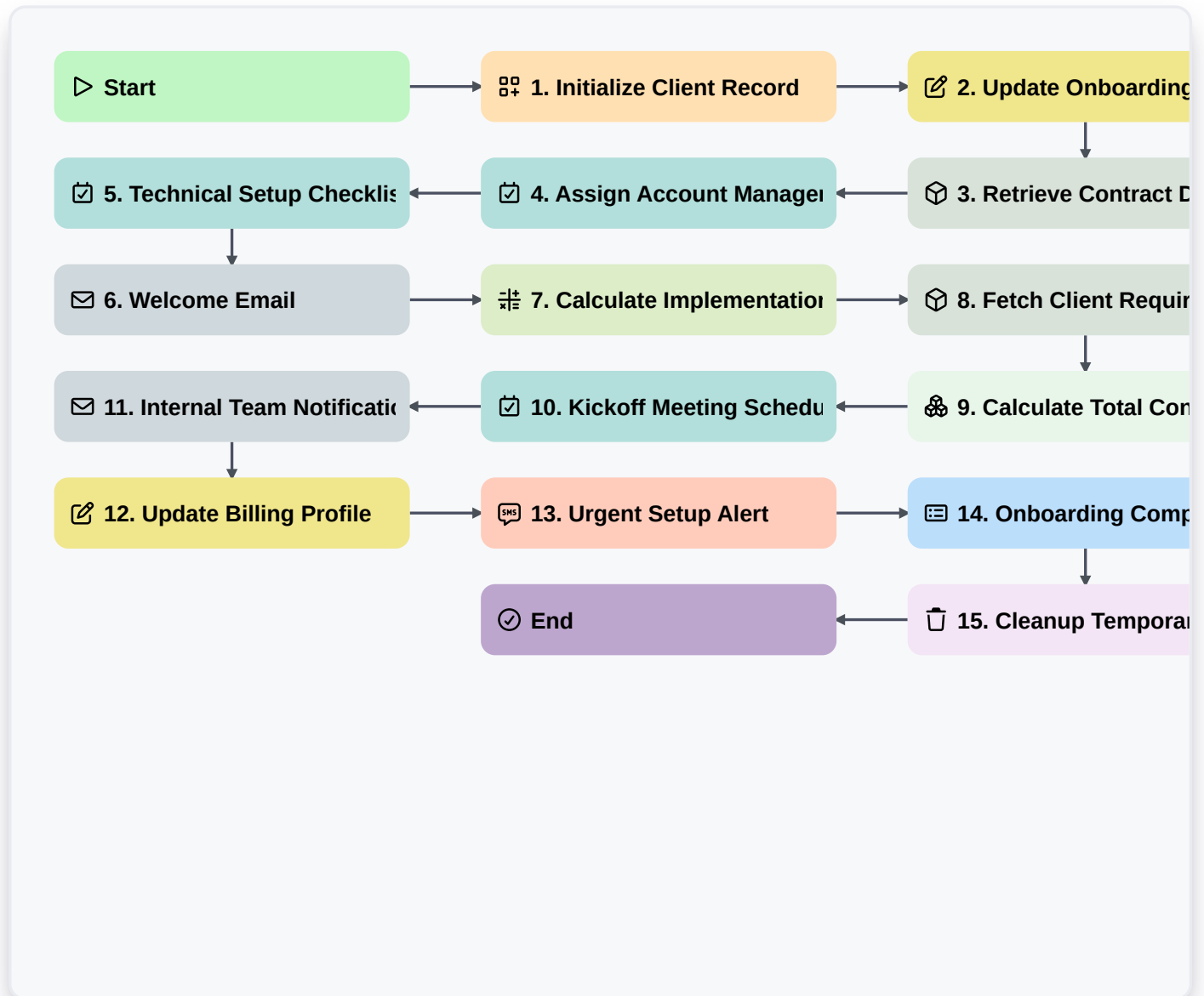


Customer Onboarding Lifecycle Process



Start

Start of the Workflow/Process.

1. Initialize Client Record

Create a new entry in the 'Client Profile' data model to begin the onboarding journey.

2. Update Onboarding Status

Update the 'Onboarding Stage' field in the Client Profile as the process moves from 'Initial' to 'Active'.

3. Retrieve Contract Details

Fetch the signed contract entry from the 'Documents' data model to extract service terms.

4. Assign Account Manager

Create a task for the Sales Lead to assign a dedicated Account Manager to the new client.

5. Technical Setup Checklist

Generate a checklist of technical configuration tasks (e.g., API keys, User Provisioning) for the DevOps team.

6. Welcome Email

Send an automated welcome email to the client's primary contact person with onboarding resources.

7. Calculate Implementation Timeline

Calculate the projected 'Go-Live Date' by adding the 'Standard Setup Duration' to the 'Contract Start Date'.

8. Fetch Client Requirements

Retrieve specific configuration requirements submitted via the client's intake form.

9. Calculate Total Contract Value (TCV)

Aggregate all line items from the 'Order' data model to sum the total revenue for this onboarding.

10. Kickoff Meeting Scheduling

Create a task for the Account Manager to schedule the first official kickoff call.

11. Internal Team Notification

Send an email to the Customer Success and Billing teams notifying them that a new client has been onboarded.

12. Update Billing Profile

Update the 'Billing Status' in the Client Profile to 'Active' once the first invoice is processed.

13. Urgent Setup Alert

Send an SMS to the Technical Lead if a critical configuration error is detected during setup.

14. Onboarding Completion Report

Generate a summary report of the onboarding duration and resource usage to be reviewed by Management.

15. Cleanup Temporary Intake Data

Delete the temporary staging entries used during the initial data collection phase to keep the data model clean.

End

End of the Workflow/Process.