

Client Onboarding Checklist

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Use this checklist for every new client. Start from the top and work through in order. Do not skip steps. Target go-live is 5 to 7 business days from signed agreement.

STEP 1 — SIGNED & PAID (Day 1)

- Client signs service agreement via nexorlink.com/sign-client.html
- First invoice paid and confirmed in Stripe
- Add client to portal (My Clients tab) with correct plan and go-live date
- Send welcome email from onboarding@nexorlink.com (see template below)
- Notify richard@nexorlink.com — new client signed

STEP 2 — INTAKE INFORMATION (Day 1–2)

- Business name, address, and main phone number collected
- Services offered (what Sofia should know about)
- Hours of operation (when to answer, when to say office is closed)
- Appointment types and durations
- Scheduling system used (if any — Jane, Kareo, SimplePractice, etc.)
- Languages spoken at practice (English only, or bilingual)
- Any special instructions or phrases to avoid
- Emergency protocol (who to call if patient says it's urgent)
- Healthcare clients: HIPAA requirements confirmed, BAA sent if needed

STEP 3 — SOFIA CONFIGURATION (Day 2–4)

- Custom Sofia prompt drafted and reviewed with client
- Phone number forwarded or transferred to NexorLink line
- Calendar integration tested (appointment books correctly)

- Test call made in English — confirm Sofia responds correctly
- Test call made in Spanish — confirm Sofia switches automatically
- No-show follow-up call tested
- Client listens to test calls and approves

STEP 4 — GO LIVE (Day 5–7)

- Client phone officially forwarded to Sofia
- Go-live date updated in portal
- Client informed Sofia is live — send confirmation email
- Monitor first 48 hours of live calls
- Check Google Calendar for correct appointment entries
- Follow up with client at Day 7 to confirm satisfaction

STEP 5 — MONTH 1 FOLLOW-UP

- Check in with client at Day 14
- Review call logs for any issues
- Month 2 retro confirmed — client active and paying
- Upsell opportunity reviewed (add-ons, plan upgrade)
- Ask for referral or Google review at Day 30

WELCOME EMAIL TEMPLATE

Subject: Welcome to NexorLink — Sofia is being set up for your practice Hi [Client First Name], Welcome to NexorLink. We're excited to have [Practice Name] on board. Here's what happens next: 1. Our team will reach out within 24 hours to collect your practice information 2. We'll configure and test Sofia specifically for your practice 3. Sofia will be live answering your calls within 5 to 7 business days In the meantime, if you have any questions, reply to this email or call us at +1 (786) 550-3307. Looking forward to working with you. Richard Landis NexorLink LLC richard@nexorlink.com · nexorlink.com