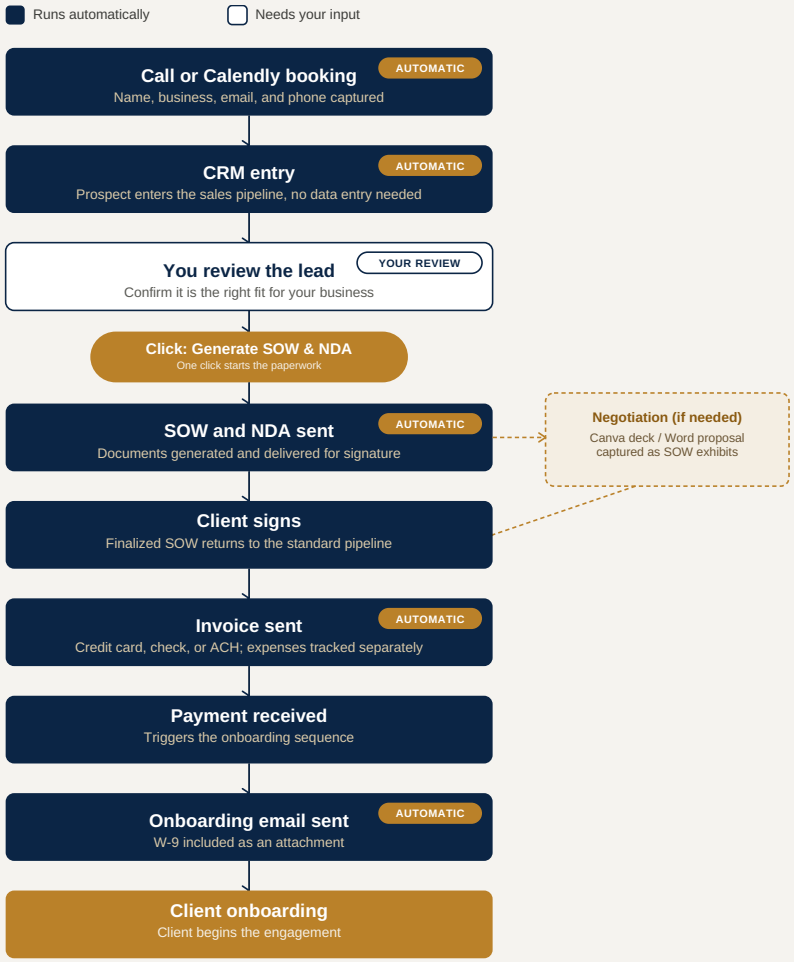
Sales Pipeline & Client Onboarding Timeline

FROM FIRST CONTACT TO ONBOARDED CLIENT

This document maps the standard path a prospect follows from initial contact through signed agreement, payment, and onboarding. Most of the pipeline runs on its own — the diagram below highlights the one point where you step in to confirm a lead is the right fit, before a single click sets the paperwork in motion.

Process diagram



Standard pipeline, stage by stage

1 Initial client contact — Automatic

A call comes in, or the prospect books directly through Calendly. Calendly captures name, business name, email address, and telephone number, and this information flows automatically into the CRM — no manual data entry required.

2 You review the lead — Your input

This is the one place you step in: a quick look to confirm the prospect is the right fit. Once you decide to move forward, a single click on **Generate SOW & NDA** starts the paperwork — you don't draft anything by hand.

3 Statement of work and NDA — Automatic

Once triggered, the SOW is generated and the NDA is sent automatically. The client reviews and signs both documents.

4 Negotiation exception

If additional negotiation is needed before the SOW is signed, a Canva pitch deck and a Word proposal can be used as supporting materials. These are captured as exhibits within the SOW itself, so the negotiation process does not need its own standardized workflow. Once the SOW is finalized and signed, the prospect returns to the standard pipeline.

5 Invoice — Automatic

Once the SOW is signed, an invoice is sent automatically. The client can pay by credit card, check, or ACH. The invoicing system also captures reimbursable expenses separately, so approved expenses can be included on the client's invoice.

6 Payment received and onboarding — Automatic

Once payment is received, a confirmation and onboarding email is sent automatically, with the W-9 included as an attachment. The client then moves into onboarding.

5 of 6 stages run automatically. Your only hands-on step is reviewing a new lead and clicking one button to start the SOW and NDA — everything from intake to invoicing to onboarding happens on its own, freeing you up for the parts of the business that need your judgment.

System requirements

CRM

- Calendly integration
- Automatic capture of name, business name, email, and phone
- Sales pipeline tracking

Documents

- Automated NDA
- Statement of Work
- SOW exhibits
- Canva pitch deck as an exhibit
- Word proposal as an exhibit

Invoicing

- Credit card payments
- Check payments
- ACH payments
- Reimbursable expense capture

Automation

- Automatic NDA delivery
- Invoice triggered by signed SOW
- Payment confirmation
- Automated onboarding email
- W-9 attachment

Want Help Implementing This?

Backoffice COO is happy to share the tools and process we use in our own office. If you would like this pipeline set up in your business, we will build it, test it, and walk you and your team through it.

IMPLEMENTATION

$1,200

Software subscriptions separate