

Client Onboarding Guide

People, evidence, access and controls required to start responsibly.

INTELLIGENT SYSTEMS. PRACTICAL RESULTS.

How this asset operates

Funnel stage	Contracting and onboarding
Audience	New PlanckCyber client teams
Trigger	Agreement complete and onboarding authorized
Objective	Prepare kickoff and prevent access, evidence or ownership gaps
Primary CTA	Complete required items before kickoff
Delivery method	PDF guide and secure workspace
CRM action	Create onboarding tasks, stakeholders, access and due dates
Follow-up	Kickoff and dependency review
Compliance	Only authorized systems and data may be accessed. Use secure channels and written project instructions.
KPI	Time to kickoff, access readiness and low onboarding rework

The project starts when the agreed people, evidence, access and decisions are ready - not merely when the calendar says kickoff.

People and decision rights

- ☐ Executive sponsor named
- ☐ Operating owner named
- ☐ Technical owner named
- ☐ Security/privacy reviewers named
- ☐ Acceptance authority named
- ☐ Day-to-day project contacts named

Workflow and evidence

- ☐ Workflow boundary confirmed
- ☐ Baseline evidence provided
- ☐ Representative users available
- ☐ Known exceptions documented
- ☐ Acceptance criteria reviewed

Systems and data

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- ☐ Approved systems and environments listed
 - ☐ Data categories classified and authorized
 - ☐ Secure upload/workspace active
 - ☐ Credentials handled through approved secrets process
 - ☐ Access expiration and review dates set

Governance and communication

- ☐ Decision log active
- ☐ Risk and issue process agreed
- ☐ Meeting cadence agreed
- ☐ Incident and escalation contacts confirmed
- ☐ Scope-change process understood

Kickoff readiness

Open dependencies

Owner for each

Due date

Kickoff decision

Client confirmation

Decision record and limitations

Decision or conclusion

Evidence supporting the decision

Material limitations and assumptions

Accountable owner

Review date

Important

Only authorized systems and data may be accessed. Use secure channels and written project instructions.

PlanckCyber resources are general planning tools. They do not create a client relationship or substitute for qualified legal, privacy, security, financial, accounting, engineering, regulatory or procurement review.