# [Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

# Customer Onboarding Welcome Pack

Welcome, and thank you for choosing us. This pack explains how we work, who to contact, and what happens in your first month with us. Please keep it somewhere you can find it easily.

**Welcome** Dear [Customer full name],

Welcome to [Company name]. We are pleased to be working with you, and this pack is your starting point. It covers the service described in your agreement, the people who will look after you, and the steps we will take together in the coming weeks. If anything in this pack is unclear, please contact us using the details in the section headed How to reach us, and we will be glad to help.

Your service begins on [Service start date]. Your main contact is [Full name and job title of the main contact], who will stay in touch throughout your first month.

**About us** [Company name] provides [Description of the services provided]. We work with customers by agreeing a clear plan at the start, keeping you informed at each stage, and checking with you before we change anything that affects your service.

**Our address:** _____ **Our telephone number:** _____

**Our email address:** _____ **Our opening hours:** _____ **Who looks after you:**

| Role | Name | What they help with | Contact details |
|---|---|---|---|
| Main contact | [Full name of the main contact] | [Responsibilities of the main contact] | [Contact details of the main contact] |
| Support contact | [Full name of the support contact] | [Responsibilities of the support contact] | [Contact details of the support contact] |
| Billing contact | [Full name of the billing contact] | [Responsibilities of the billing contact] | [Contact details of the billing contact] |

**How we work** We agree your plan and your first milestones with you before work begins.

We keep you updated at the times agreed in your plan, and sooner if anything changes.

We ask for your approval before making any change that affects the cost, timing, or scope of your service.

We record decisions and agreed actions in writing, so both sides have the same record.

We review progress with you at the end of your first month and agree the next steps together. **Your first month:**

| When | What happens | What we need from you |
|---|---|---|
| Week 1 | Welcome call and confirmation of your plan and contacts. | [Information or documents needed in week 1] |
| Week 2 | Service set-up and first checks completed. | [Information or documents needed in week 2] |
| Week 3 | First progress update and any early questions answered. | [Information or documents needed in week 3] |
| Week 4 | First-month review meeting and agreement of next steps. | [Information or documents needed in week 4] |

**Getting started checklist** Please work through this checklist in your first week. Tick each box as you complete it.

**[ ]** Confirm your contact details and your preferred way of being contacted.

**[ ]** Send the information or documents listed for week 1 in the table above.

**[ ]** Save our contact details and your main contact's details.

**[ ]** Note the date and time of your welcome call.

**[ ]** Read the billing and payment section below and ask us about anything unclear.

**[ ]** Tell us about any dates when you will be unavailable during your first month.

**Billing and payment** You will be billed as described in your agreement. Invoices are sent to [Invoice delivery method and address]. Payment is due within [Number of days for payment] days of the invoice date, by [Accepted payment methods]. If you have a question about an invoice, please contact [Full name and job title of the billing contact] before the payment date, so we can resolve it without delay.

**How to reach us and how to raise a concern** For day-to-day questions, contact [Full name and job title of the main contact] using the details above. If you are unhappy with any part of our service, please tell us straight away so we can put it right. You can raise a concern by telephone, by email, or in writing to [Complaints contact address or email address]. We will acknowledge your concern within [Acknowledgement timescale for concerns] and tell you what happens next.

Thank you again for choosing [Company name]. We look forward to working with you.