CLIENT ONBOARDING TEMPLATE

AT RISK SUMMARY

AT RISK	7

STATUS SUMMARY

Not Started	20
In Progress	1
Complete	2
On Hold	1
Overdue	1
Needs Review	1
Canceled	1

AT RISK	TASK NAME	STATUS	CLIENT OWNER	INTERNAL OWNER	START DATE	END DATE	DURATION	% COMPLETE	PREDECESSORS
-	**Onboarding Plan**				**06/26**	**09/03**	**50**	**11%**	
-	**Initiation**				**06/26**	**06/28**	**2**	**42%**	
X	Statement of Work	Complete	TBD	Example Name	06/26	06/26	1	100%	
X	Establish Onboarding Team	In Progress	TBD	Example Name	06/27	06/27	1	50%	10
	Welcome Email	On Hold	TBD	Example Name	06/27	06/27	1	20%	
	Prepare Welcome Email	Needs Review	TBD	Example Name	06/27	06/27	1	40%	10
	Send Welcome Email	Not Started	TBD	Example Name	06/27	06/27	1	0%	13
	Plan				**07/03**	**07/12**	**7**	**17%**	
	Kickoff Call	Canceled	TBD	TBD	07/03	07/05	2	0%	
X	Conduct Kickoff Call	Complete	TBD	TBD	07/03	07/03	1	100%	14FS +2d
X	Kickoff Call Follow-up	Overdue	TBD	TBD	07/07	07/07	1	0%	17FS +1d
X	Onboarding Milestones	Not Started	TBD	TBD	07/07	07/12	5	0%	
X	Update Onboarding Milestones	Not Started	TBD	TBD	07/07	07/10	4	0%	18
X	Flag Onboarding Milestones	Not Started	TBD	TBD	07/11	07/11	1	0%	20
-	**Pre-Launch**				**07/13**	**08/23**	**30**	**0%**	
	Product and Process Framework	Not Started	TBD	TBD	07/13	07/19	5	0%	
	Design and Draft Framework	Not Started	TBD	TBD	07/13	07/17	4	0%	21
	Review with Client	Not Started	TBD	TBD	07/18	07/18	1	0%	24
	Update and Finalize Framework	Not Started	TBD	TBD	07/21	07/21	1	0%	25
	Proof Of Concept	Not Started	TBD	TBD	07/21	08/16	20	0%	
	Initial Proof of Concept	Not Started	TBD	TBD	07/21	08/09	15	0%	26
	Review and Update with Client	Not Started	TBD	TBD	08/11	08/16	5	0%	28
	Document	Not Started	TBD	TBD	08/17	08/22	5	0%	
	Document the Solution	Not Started	TBD	TBD	08/17	08/22	5	0%	29
	Send Documentation to Client	Not Started	TBD	TBD	08/22	08/22	1	0%	31
	Launch				**08/24**	**09/03**	**8**	**0%**	
	Data Set-Up	Not Started	TBD	TBD	08/25	08/27	3	0%	
	Establish Process for Client	Not Started	TBD	TBD	08/25	08/25	1	0%	32
	Conduct Data Transfer	Not Started	TBD	TBD	08/27	08/27	1	0%	35
	Implementation	Not Started	TBD	TBD	08/27	09/03	6	0%	
	Provide Completed Solution	Not Started	TBD	TBD	08/27	08/27	1	0%	36
	Launch with Client	Not Started	TBD	TBD	08/28	09/03	5	0%	38