Companion to The First 30 Days webinar

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Client Onboarding Readiness Assessment Action Plan

Is your firm using the 30-day window, or losing it?

A self-assessment and planning tool for leaders at AmLaw 200 and Global 100 law firms.

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HOW TO USE THIS WORKBOOK

Four sections. One clear outcome.

What's inside:

- Readiness Assessment – 25 questions across 5 blueprint stages
- Gap Analysis – Using your readiness score
- Internal Case Builder – 5 objections and how to respond
- 90-Day Action Plan – Foundation, build, measure

Instructions: Complete this workbook in under 30 minutes. It works best when two or three people from different functions (business development, practice group leaders, innovation, operations, technology) complete it together. The scoring differences between perspectives are often more revealing than the scores themselves.

ASSESS
Score your firm across all five blueprint stages.

ANALYZE
See where the gaps sit with your readiness scores.

BUILD THE CASE
Prepare for the five objections you will hear.

PLAN 90 DAYS
Sequence your first pilot: foundation, build, measure.

THE 30-DAY CLIENT ONBOARDING BLUEPRINT

Five stages. One window.

Each stage represents a critical moment in the first 30 days of a client relationship. The firms that use this window deliberately are building an advantage that compounds with every new engagement.

1. **BEFORE DAY 1**
Every hour of silence is a missed signal.

2. **DAY 1**
Not just a call. A ritual of commitment.

3. **WEEK 1**
Proactive beats reactive. Always.

4. **WEEK 2-4**
Transparency is a retention strategy.

5. **MONTH 1**
Where retention becomes pipeline.

The Healthcare Parallel

When you join a new healthcare provider, you receive a portal before your first appointment. Team introductions. Intake forms. Your schedule. Before you walk through the door, they were ready for you. Law firms have the same opportunity. Almost none are taking it.

1 BEFORE DAY 1 — 2 DAY 1 — 3 WEEK 1 — 4 WEEK 2-4 — 5 MONTH 1 REVIEW

STAGE 1 OF 5

Before Day 1

How your firm structures the first interaction with a new client.

Scoring
1 = We do not do this at all. 2 = Informal/partner-driven. 3 = Some structure, inconsistent. 4 = Defined process. 5 = Firm-wide, consistent.

A welcome communication is sent to the client within 24 hours of signing	1	2	3	4	5
The client knows who is on their team before the first call (names, roles, contact information)	1	2	3	4	5
A matter overview or engagement summary is accessible to the client before Day 1	1	2	3	4	5
Common questions about billing, process, and timing are addressed proactively	1	2	3	4	5
The client has a single place (portal, workspace, or document) where they can find everything they need	1	2	3	4	5

Stage 1 Subtotal: _____ /25

What is the biggest gap at this stage?

1 BEFORE DAY 1 — 2 DAY 1 — 3 WEEK 1 — 4 WEEK 2-4 — 5 MONTH 1 REVIEW

STAGE 2 OF 5

Day 1

How your firm structures the first interaction with a new client.

Scoring
1 = We do not do this at all. 2 = Informal/partner-driven. 3 = Some structure, inconsistent. 4 = Defined process. 5 = Firm-wide, consistent.

The kickoff call follows a structured agenda shared with the client in advance	1	2	3	4	5
Key contacts are introduced with their specific functional role (billing, legal, relationship)	1	2	3	4	5
The client leaves the first interaction knowing exactly what happens next	1	2	3	4	5
A shared workspace or collaboration space is activated during or immediately after the first call	1	2	3	4	5
An engagement summary or recap is shared within 24 hours of the kickoff	1	2	3	4	5

Stage 1 Subtotal: _____ /25

What is the biggest gap at this stage?

1 BEFORE DAY 1 — 2 DAY 1 — 3 WEEK 1 — 4 WEEK 2-4 — 5 MONTH 1 REVIEW

STAGE 3 OF 5

Week 1

How your firm communicates proactively in the first week of the engagement.

Scoring
1 = We do not do this at all. 2 = Informal/partner-driven. 3 = Some structure, inconsistent. 4 = Defined process. 5 = Firm-wide, consistent.

A proactive status update is sent during the first week without the client requesting it	1	2	3	4	5
The client can see the matter timeline or project status at any time	1	2	3	4	5
At least one value-add resource relevant to the client's industry is shared unprompted	1	2	3	4	5
The client knows how they will receive ongoing updates (cadence, format, channel)	1	2	3	4	5
The team has a defined internal handoff process for transitioning from BD/intake to delivery	1	2	3	4	5

Stage 1 Subtotal: _____ /25

What is the biggest gap at this stage?

1 BEFORE DAY 1 — 2 DAY 1 — 3 WEEK 1 — 4 WEEK 2-4 — 5 MONTH 1 REVIEW

STAGE 4 OF 5

Weeks 2-4

How your firm maintains communication rhythm, billing transparency, and relationship development.

Scoring
1 = We do not do this at all. 2 = Informal/partner-driven. 3 = Some structure, inconsistent. 4 = Defined process. 5 = Firm-wide, consistent.

Clients receive regular updates on a defined cadence (not only when they ask)	1	2	3	4	5
Work-in-progress or billing estimates are visible to the client before the invoice arrives	1	2	3	4	5
Relationship touchpoints beyond the matter occur (industry content, firm events, introductions)	1	2	3	4	5
There is a defined process for identifying and escalating early warning signs of dissatisfaction	1	2	3	4	5
The client relationship is managed holistically, not just matter-by-matter	1	2	3	4	5

Stage 1 Subtotal: _____ /25

What is the biggest gap at this stage?

STAGE 5 OF 5

Month 1 Review

Whether your firm has a formal mechanism for evaluating relationship health and identifying expansion.

Scoring

1 = We do not do this at all. 2 = Informal/partner-driven. 3 = Some structure, inconsistent. 4 = Defined process. 5 = Firm-wide, consistent.

A formal 30-day relationship review is scheduled with new clients	1	2	3	4	5
The review covers relationship health, not just matter status	1	2	3	4	5
Cross-sell and expansion opportunities are discussed during or immediately after the review	1	2	3	4	5
Client satisfaction is measured in a structured way (not just anecdotal partner feedback)	1	2	3	4	5
Insights from the review are captured and used to improve onboarding for future clients	1	2	3	4	5

Stage 1 Subtotal: _____ /25

What is the biggest gap at this stage?

Notes

YOUR RESULTS

Readiness score and gap analysis

Transfer your five stage subtotals and add them together.

TOTAL READINESS SCORE

_____ /125

25 - 50	51 - 75	76 - 100	101 - 125
FOUNDATIONAL	DEVELOPING	STRUCTURED	EXCEPTIONAL

TRANSFER YOUR STAGE SUBTOTALS BELOW

Gap Analysis

The stage with the lowest score is your highest-impact opportunity. Not because it is the most broken, but because it is where the gap between current state and exceptional is widest.

STAGE	YOUR SCORE	BENCHMARK	GAP	PRIORITY RANK
Before Day 1	______	22-25	______	______
Day 1	______	20-25	______	______
Week 1	______	20-24	______	______
Weeks 2 to 4	______	18-22	______	______
Month 1 Review	______	18-22	______	______

REFERENCE CARD

The 30-day onboarding gap at a glance

The full five-stage contrast on a single page. Print this page and keep it visible.

STAGE	MOST FIRMS	vs	BEST EXPERIENCE
Before Day 1	Silence after the engagement letter. Client waits and wonders.	vs	Welcome portal live: team roster, matter overview, FAQ, key contacts ready on arrival.
Day 1	Intro call, email recap. Client often unsure who to contact for what.	vs	Structured agenda shared in advance. Shared workspace activated. Contacts mapped by function.
Week 1	Work begins. No updates unless the client asks.Communication is reactive.	vs	Proactive status pulse mid-week. Matter timeline visible. Value-add resource shared unprompted.
Weeks 2 to 4	Billing surprises. Ad hoc check-ins driven by client worry. Momentum stalls.	vs	Cadenced update rhythm. Billing transparency maintained. Relationship touchpoints beyond the matter.
Month 1 Review	No formal review. Firm assumes everything is fine unless client complains.	vs	Structured 30-day check-in. Relationship health assessment. Expansion signal identified.

THE GAP IS NOT ABOUT RESOURCES.

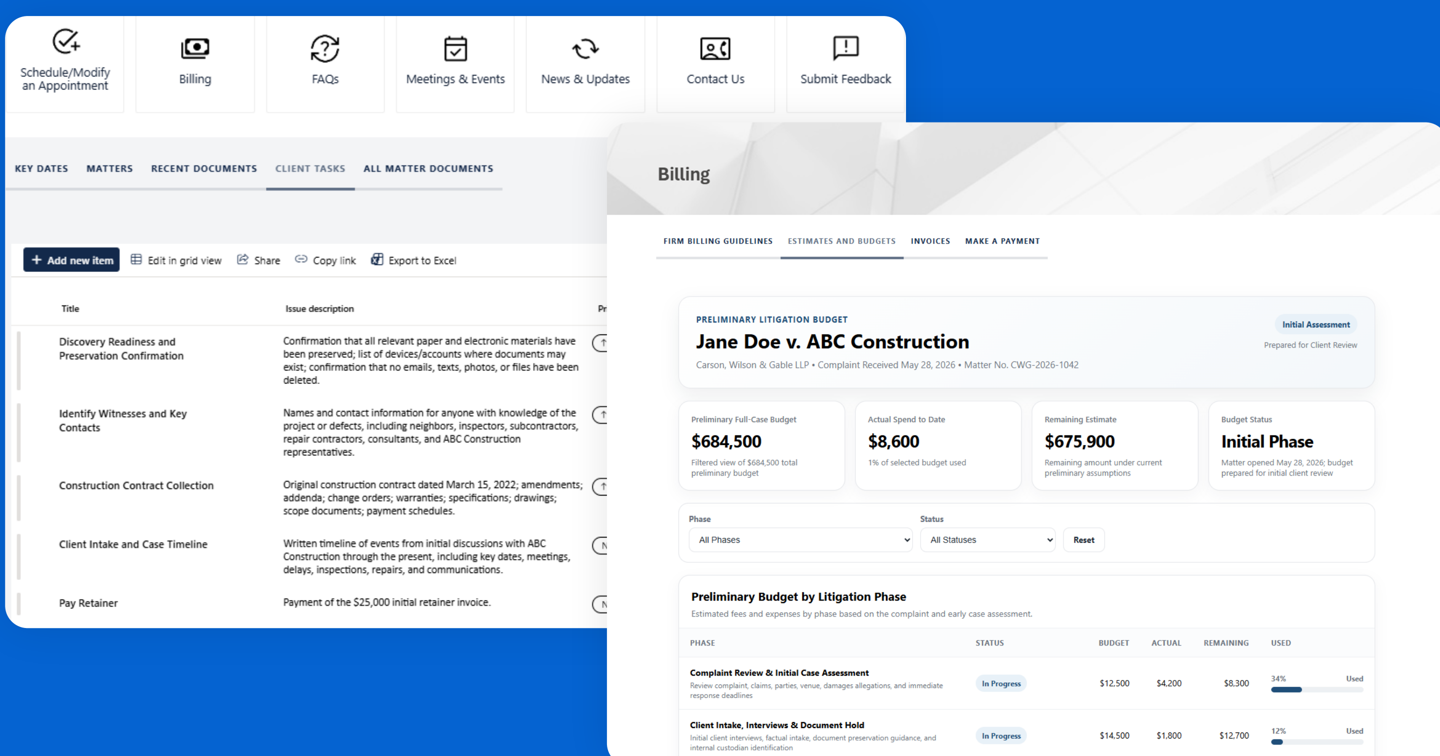
It is about whether someone inside your firm decided this window mattered.

TECHNOLOGY IS THE VEHICLE.

The blueprint is the strategy. Build the strategy first. The portal follows.

RETENTION BECOMES PIPELINE.

If you have done the first 30 days well, the expansion conversation is warm.



The five objections you will hear from partners

The most common reason client onboarding initiatives stall is not technology, budget, or time. It is the internal conversation. This section gives you the framing and the responses.

The framing that works

Do not position this as a technology initiative or an efficiency project. Position it as a relationship signal. The question that moves the conversation:

"What do our best clients already expect, and are our competitors starting to deliver it?"

Objection 1: *"We do not need a portal. The relationship is personal."*

Response: A structured welcome experience does not replace the partner's relationship. It amplifies it. The partner still leads the relationship, but the firm demonstrates readiness before the first call. The portal is not an alternative to personal touch. It is the evidence that the firm prepared for this client specifically.

Objection 2: *"Our clients have never asked for this."*

Response: Clients do not ask for better onboarding the same way patients do not ask for a patient portal. They simply experience it elsewhere and adjust their expectations. GCs are already experiencing structured onboarding from financial services firms, consulting firms, and technology vendors. The question is not whether they expect it. It is how long before they penalize firms that do not offer it.

Objection 3: *"We do not have the resources or budget for this."*

Response: The first version does not require a technology build. It requires a decision about what information a new client should receive before Day 1, who sends it, and in what format. An email template, a shared folder, and a one-page FAQ can accomplish 80% of the blueprint at zero incremental cost. The technology accelerates and scales it. But the strategy comes first.

Objection 4: *"This is an admin function, not a strategic initiative."*

Response: The firms that treat onboarding as admin lose clients they should have kept and miss cross-sell opportunities they should have captured. The firms that treat onboarding as strategy see measurable improvement in satisfaction scores, billing dispute rates, and retention. The difference is not what gets done. It is who owns it and how seriously the firm treats it.

Objection 5: *"How do we know this will actually move the needle?"*

Response: Start with a pilot. Select five new client engagements over the next quarter. Apply the blueprint to those five. Measure: billing dispute rate, client satisfaction feedback at Month 1, and number of expansion conversations generated. Compare against five similar engagements without the blueprint. The data will make the case better than any presentation.

90-DAY ACTION PLAN

From assessment to pilot to results

Start with one stage: the highest-priority stage from Part 2. Do not attempt all five stages simultaneously. A focused improvement at one stage is more valuable than a half-built program across all five.

FOUNDATION: DAYS 1-30

- Assemble a working group: one person from business development, one from technology, one from operations
- Complete the readiness assessment with the working group (use this workbook collaboratively)
- Select the pilot scope: five new client engagements in the next quarter
- Draft the welcome communication template (what the client receives before Day 1)
- Identify the partner sponsor: one senior partner who will champion the pilot
- Schedule the first partner conversation using the case builder framing from Part 3

BUILD AND PILOT: DAYS 31-60

- Build the pilot version of the welcome experience (template, not technology) for the selected stage
- Brief the teams assigned to the five pilot engagements on the process
- Launch the first pilot engagement and collect structured feedback
- Document the client reaction: what they said, what they did, what surprised them
- Adjust the template based on first-engagement feedback
- Brief the partner sponsor on early results

MEASURE AND EXPAND: DAYS 61-90

- Complete all five pilot engagements
- Compile the pilot data: billing dispute rate, client satisfaction feedback, expansion conversations
- Compare pilot results against non-pilot engagements from the same period
- Present findings to the working group and partner sponsor
- Make the recommendation: scale to additional practices, adjust the template, or expand to other stages

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What comes next

You have the blueprint

Here is how to use it

AUDIT WHERE YOU STAND

Answer five honest questions: What does a new client receive before the first call? What do they know about their team on Day 1? How do they find out what happens next? When do they hear from you proactively? Do you have a formal 30-day review? The answers tell you where to start.

PICK THE HIGHEST-IMPACT STAGE

You do not need to rebuild everything at once. Identify the single stage where the gap between current state and best practice is largest. Start there. A focused improvement at one stage is more valuable than a half-built program across all five.

BUILD THE INTERNAL CASE

The hardest part is not the technology. It is the partner conversation. The framing that works: this is not about replacing the relationship. It is about signaling, before the work begins, how seriously the firm takes it. That reframe moves partners from resistance to sponsorship.

Ready to build a Welcome Portal for your firm?

Schedule a consultation with us to start.