

Client Onboarding Standard Operating Procedure

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Client Onboarding Standard Operating Procedure (24–48h SLA)

1. **Step 1: Setup Fee Ingestion** (Stripe Checkout: \$119 / \$229 / \$499).
2. **Step 2: Intake Sheet Collection** (Business hours, service catalog, emergency dispatch phone, calendar link).
3. **Step 3: Assistant Calibration** (Clone industry prompt template, inject business details, tune ElevenLabs voice).
4. **Step 4: Dedicated DID Provisioning** (Provision Telnyx local DID in client's area code).
5. **Step 5: Internal Stress Test** (Conduct 2 simulated test calls).
6. **Step 6: Staging Line Handoff** (Send client private staging number to test).
7. **Step 7: Day 14 Check-In** (Review captured jobs, transition to recurring monthly subscription).