Majority Media

PATHOPERATE™ · SAMPLE DELIVERABLE EXCERPT

Onboarding, SOPs & Metrics

Three excerpts from a PathOperate™ engagement: the client onboarding workflow, one standard operating procedure, and the metrics dashboard.

ILLUSTRATIVE SAMPLE Northfield Ledger Co. is a fictional business. This excerpt shows the format and depth of the deliverable. It is not client work, and the figures are invented for illustration, not results.

The business at a glance

Business	Northfield Ledger Co. (fictional)
What it does	Bookkeeping and payroll for small trades businesses: contractors, landscapers, cleaning companies
Team	Owner plus two part-time contract bookkeepers
Clients	38 monthly clients, most billed hourly
Diagnosis	PathEval™: Change on positioning & offers and on operations & capacity; Keep on marketing & sales

1. Client onboarding workflow

Before: onboarding lived in the owner's inbox, and each new client took about six hours of back-and-forth. After: one triggered workflow, with the owner involved at a single step.

When	Step	Owner	Tool	Automated?
Day 0	Signed proposal triggers welcome email and intake form	System	CRM	Yes
Day 1	Secure document request: bank access, prior returns, payroll list	System	Client portal	Yes
Day 3	Reminder for missing documents	System	CRM	Yes
Day 5	Accounts connected and chart of accounts set up for trade job costing	Bookkeeper	Accounting software	No
Day 7	Kickoff call: confirm tier, payroll dates, contacts	Owner	Video call	No
Day 30	First monthly close and P&L summary sent	Bookkeeper	Accounting software	Partly
Day 35	Check-in survey: "Is anything unclear?"	System	CRM	Yes

2. Sample SOP: Monthly close

Purpose	Close every client's books by the 10th of the following month
Owner	Assigned bookkeeper (reviewed by the owner on Review-tier clients)
Frequency	Monthly, between the 1st and the 10th
Tools	Accounting software, client portal, close checklist

Steps

1. Download the bank and card statements for the month from the client portal.
2. Reconcile every account to the statement balance; flag any difference over $25.
3. Categorize uncategorized transactions using the client's job-costing rules.
4. Post payroll journal entries and confirm they match the payroll report.
5. Run the P&L and compare it with the prior month; note any line that changed by more than 20%.
6. Write a three-sentence plain-English summary and send it with the P&L.
7. Mark the client "closed" in the CRM.

Quality checks and escalation

- ✓ All accounts reconciled to zero difference, or the difference explained in the file
- ✓ Summary sent by the 10th
- ✓ Escalate to the owner if a client's documents are more than 5 days late, or if cash on hand drops below one month of payroll

3. Metrics dashboard

Six numbers the owner checks each week. Figures are illustrative.

Metric	Target	This month	Status	Owner
Books closed by the 10th	100%	92%	Watch	Bookkeepers
Onboarding completed in 7 days	90%	100%	On track	System + owner
Hours per client per month	≤ 3.5	3.1	On track	Bookkeepers
Unbilled extra requests	0	2	Watch	Owner
Invoices paid within 15 days	90%	84%	Watch	Owner
Client check-in score	4.5 / 5	4.7	On track	Owner

HANDOVER Every workflow, SOP and dashboard is documented and walked through with the team, so the business runs it without the owner in the middle.