new client onboarding packet

new client engagement process

Step 1: Initial Conversation & Proposal

Meeting(s) to review needs in order to draft a proposal and timeline.

Step 2: Contract Review & Agreement

A contract is drafted, reviewed, and signed.
The first installment billed.

Step 3: Initiation of Service & Info Request

ECS Staff assigned to account and information requested
for next steps.

Step 4: Logic Model (s) Review

Logic model(s) are reviewed and critiqued. Meet with ECS
staff to discuss and update logic models as needed.

Step 5: Reach Collaboration Software Setup

Reach Collaboration is setup and training is scheduled for new users.

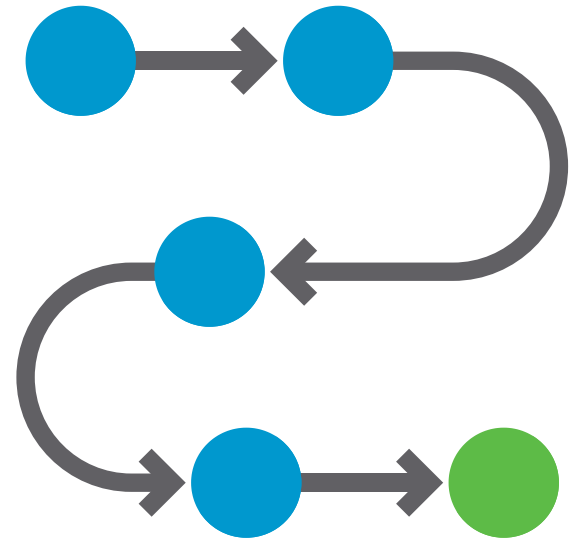## Step 6: Begin Data Collection & Review

The client begins tracking data/outputs in Reach and ECS provides
scoring/reviewing of data.

Step 7: First Site Visit

Includes meeting key members and staff, a community tour, and
discussion of future needs. (typically scheduled within first 2-3 months)

Step 8: Regular Check-Ins

Touch base as the client desires to discuss how things are going and
address any problems/concerns.

Reach Collaboration

practical solutions to complex problems