SOP WAREHOUSESOP

FREE PRINTABLE CHECKLIST

New Client Onboarding Checklist

Best practice: no regulation governs this procedure, so none is cited.

FACILITY	AREA OR EQUIPMENT ID	DATE	SHIFT
INSPECTED BY (PRINT)		SIGNATURE	

1. Procedure checks

Tick each step as it is done, in this order.

DONE	CHECK	NOTES
☐	One named project owner and a dated plan before anything else starts	
☐	Requirements packet complete and item master verified before any configuration	
☐	Walk the contract: confirm contractual KPIs and every billable event in writing	
☐	Test the integration both directions, including exceptions, and get sign-off	
☐	Slotting, labels, packing spec, and work instructions staged before first receipt	
☐	Train everyone touching the product before day one, with signed records	
☐	Count the initial inventory and get the client to confirm the baseline	
☐	Daily hypercare calls until stable, then a written review and formal handoff	

2. Compliance checks

Tick each item that is in place.

DONE	CHECK	NOTES
☐	Every onboarding project has a named project owner, a written project plan with task owners and due dates, and a target go-live date agreed with the client	
☐	The requirements packet is complete before configuration begins, including a verified item master with dimensions and weights, lot, serial, and expiry requirements, special handling, hazmat disclosure, and value-added work	
☐	Contractual KPIs and billable events are confirmed in writing against the signed contract before go-live, and billing event capture is configured in the WMS	
☐	Integration testing is completed and signed off with test orders in both directions, including exception transactions, before any live order flows	
☐	The slotting plan, label stock, packing spec, and client-specific work instructions are in place before the first receipt	
☐	Every employee who will handle the client's product is trained on the client's requirements before go-live, with signed training records	

☐	Initial inventory is received as a counted receipt, discrepancies are reported to the client before putaway, and the client confirms the opening baseline	
☐	The go-live checklist is signed before go-live, and any waived item carries a written waiver with a closure date	
☐	Hypercare runs with daily client calls until exit criteria are met, and exit is confirmed with the client on a stated date	
☐	A post-go-live review is completed within 30 days, lessons feed back into this SOP and its templates, and the account is formally handed off to account management	

WARNINGS

Never configure the WMS or build items from an unverified item master; bad dimensions and weights resurface as failed cartonization, wrong quotes, and slotting rework

Never let a client's first invoice be the first time billing is compared to the contract

Never accept undisclosed hazmat; every item is screened against the facility's permitted classes before it is approved to receive

SUPERVISOR REVIEW

REVIEWED BY (SUPERVISOR)	SIGNATURE	DATE