

Best Client Onboarding Experience

This award recognises organisations that deliver a smooth, professional and effective onboarding experience for new clients.

Submissions should be no more than 2000 words in total, including a 250-word summary. Supporting materials may be included where relevant.

Overview (250 words max)	Briefly describe your organisation, onboarding process and typical client journey.
Onboarding Structure and Process	Describe how your onboarding process is managed from initial engagement through to implementation or service delivery.
Communication and Client Support	How do you ensure clients feel informed, supported and confident throughout onboarding?
Efficiency and Problem Management	How do you manage timelines, expectations, issues or changes during onboarding?
Client Feedback and Outcomes	Provide evidence of onboarding success, including client feedback, implementation success, retention or reduced onboarding issues.

Scoring (100 Points Total)

- Onboarding Structure and Process: 25
- Communication and Client Support: 25
- Efficiency and Problem Management: 20
- Client Feedback and Outcomes: 30

Tips for a Successful Entry

- Answer each section clearly using the headings provided. Marks will be based on the evidence you include.
- Focus on what you did and the results it delivered. Include data where possible.
- **Only the first 2000 words of your entry will be assessed.**
- There is a 10MB limit per file for supporting documents. Contact the awards team if needed.