



CLIENT ONBOARDING

# Checklist & Implementation Guide.

A practical framework for building consistency, compliance, and confidence across your provider network.



# Introduction

In complex, multi-site operations, consistency is everything. Yet for many organizations, onboarding remains one of the most fragmented, risk-prone stages of supplier and contractor management. The **Accoree Client Onboarding Checklist & Implementation Guide** was built to change that.

This guide provides a clear, step-by-step framework for establishing a standardized, compliant, and performance-driven onboarding process across your entire network of providers—no matter the size, scope, or sector. From defining expectations and verifying documentation to monitoring compliance and improving over time, each section is designed to help you build an ecosystem of partners who are aligned, accountable, and ready to perform from day one.

With Accoree, onboarding becomes more than a prerequisite—it becomes a competitive advantage.

# About This Guide

This guide is designed for leaders in operations, procurement, compliance, and facilities management who oversee external service networks and need a structured approach to onboarding. It serves as both a **reference tool** and an **implementation roadmap**, helping you align internal teams, standardize expectations, and ensure every provider entering your system meets your organization's operational, safety, and performance standards.

Each section outlines a critical stage of the onboarding lifecycle, from ownership and documentation to readiness and continuous improvement, paired with actionable checklists to help your teams execute with precision. Whether you're refining an existing process or building one from the ground up, the steps that follow will help you replace fragmented workflows with a single, cohesive system built for **clarity, compliance, and control**.



# 01

## Establish Program Ownership

*Set accountability before activation.*

Before onboarding begins, identify who within your organization owns the process.

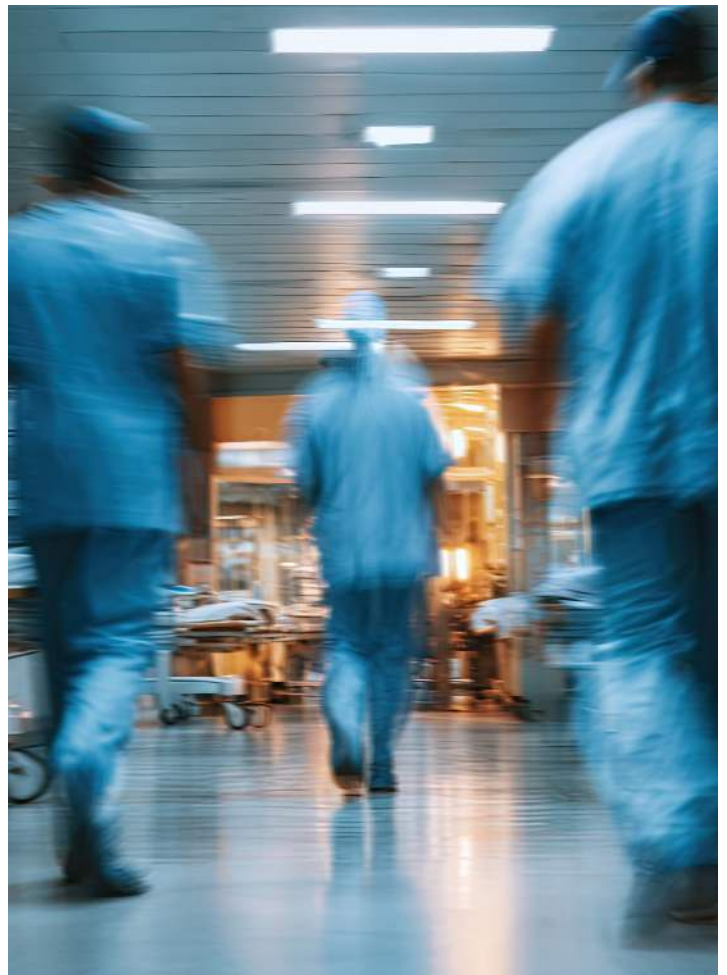
Without clear accountability, onboarding quickly becomes fragmented, often handled differently by region, division, or department. Establishing ownership ensures everyone follows the same playbook.

### PRO TIP

Treat onboarding like any other supply chain process — centralized, standardized, and owned by a single accountable function.

### HOW TO DO IT

- Designate an Onboarding Administrator or Vendor Compliance Lead responsible for managing provider records and approvals, even if working with a compliance partner like Accoree.
- Define cross-departmental roles:
  - **Procurement:** initiates onboarding requests and approves commercial terms.
  - **Legal:** validates contracts, insurance, and risk requirements.
  - **Operations or Facilities Management:** reviews technical or service-specific criteria.
  - **Environmental, Health & Safety (EHS) / Risk:** verifies safety standards and compliance alignment.
- Grant all relevant team members access credentials to the vendor management and automated workflow systems, ensuring proper permissions by role.
- Review and align your internal approval thresholds for decision-making and escalations.



# 02

## Define Standards & Expectations

*Clarity creates consistency.*

The foundation of scalable onboarding is a shared understanding of what “approved” means. Before onboarding begins, document your standards; not just what’s required legally, but what’s expected operationally and culturally.

### DEFINE

#### Minimum Requirements

Insurance coverage limits, safety certifications, background checks, and professional qualifications.

#### Compliance Criteria

Adherence to OSHA, ISO, or regional regulatory frameworks.

#### Operational Expectations

SLAs, response times, reporting cadence, and communication protocols.

#### Cultural Standards

Professionalism, conduct, and alignment with your brand’s values.

#### Sustainability or ESG Commitments

Documentation for ethical sourcing or environmental practices, if applicable.

### WHY IT MATTERS

By defining expectations early, you remove ambiguity. Providers know exactly what success looks like before their first assignment, creating stronger alignment and fewer compliance gaps.



# 03

## Collect & Verify Provider Information

*Eliminate uncertainty with complete documentation.*

Accoree centralizes documentation collection and validation, so every provider is reviewed through the same lens. This protects your organization from risk and ensures all providers meet your operational and legal requirements before work begins.

## WHAT TO COLLECT

### Company Information

Legal entity name, tax identification, and ownership structure.

### Financial Documents

W-9, bank verification, or international tax forms.

### Insurance Certificates (COI)

Verified coverage meeting your specified minimums.

### Licenses & Certifications

Trade-specific, safety, or professional accreditations.

### Health & Safety Records

OSHA logs, safety manuals, or training records.

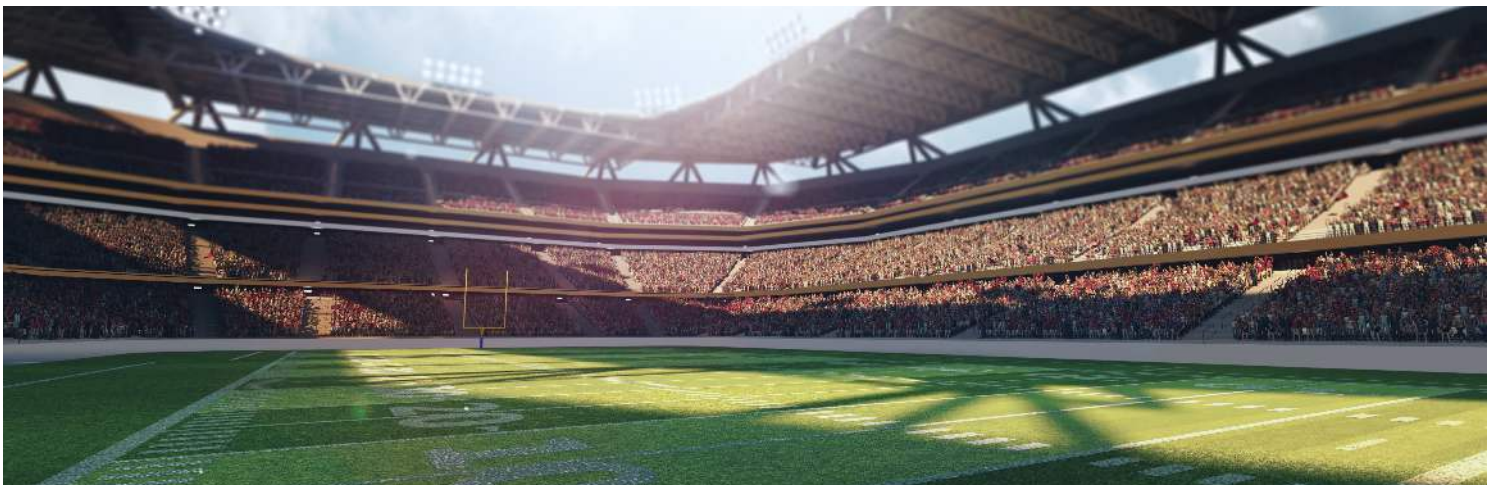
### Compliance Attestations

Code of conduct, subcontractor policy, or data protection agreements.

Thorough collection and verification confirms compliance and establishes confidence across an organization. A complete, validated provider record ensures every partner entering your supply chain meets the same high standard of qualification, safety, and reliability. By maintaining consistent documentation and proof of compliance across all providers, organizations create a single source of truth—one that supports audit readiness, strengthens accountability, and builds trust across every layer of the supply chain.

## VERIFICATION PROCESS

Accoree's platform automates validation workflows, flagging expired, missing, or inconsistent records in real time. Our system reduces manual errors, improves accuracy, and maintains a digital audit trail for every provider profile.



# 04

## Configure Workflow & Approval Gates

*Standardize decisions for scalable oversight.*

Uniformity is what separates reactive organizations from high-performing ones. By mapping structured workflows and approval gates, Accoree ensures that no provider bypasses critical checks — no matter the region, function, or service category.

### STEPS TO CONFIGURE

#### Approval Gates

Define who approves which documents or provider categories.

#### Automated Alerts

Set triggers for expiring documents, pending approvals, or incomplete submissions.

#### Escalation Protocols

Designate how exceptions or urgent cases are reviewed.

#### Integration Points

Sync Accoree’s workflow with your ERP, procurement, or VMS systems to maintain data consistency.

#### Audit Visibility

Use Accoree’s dashboard to track where each provider sits in the approval pipeline.

### OUTCOME

You gain full control without slowing down the process — every provider moves through the same automated system with built-in governance.

# 05

## Pre-Dispatch Alignment & Readiness

*Get providers ready for the field, not just approved on paper.*

An approved vendor isn't necessarily a ready one.

This phase ensures providers understand your expectations, processes, and policies before they perform work on your behalf.

### CHECKLIST

- ☐ **Conduct a readiness review.**  
*Confirm insurance, licenses, and credentials are current and match project scope.*
- ☐ **Schedule a pre-engagement briefing.**  
*Outline response times, communication protocols, and performance metrics.*
- ☐ **Ensure completion of client-specific safety or security training.**
- ☐ **Collect provider acknowledgment of all relevant SOPs, policies, and escalation procedures.**
- ☐ **Verify the provider's point of contact and on-site supervision arrangements.**

### RESULT

When the first work order goes out, every provider is not just qualified — they're aligned, equipped, and accountable.

# 06

## Continuous Compliance & Monitoring

*Compliance isn't a milestone. It's a cycle.*

Once a provider is approved, their status shouldn't be static. Accoree's platform maintains ongoing compliance through automated tracking, alerts, and performance visibility — ensuring every active provider remains audit-ready at all times.

### MAINTAIN

#### Automated Renewal Tracking

Notifications for upcoming expirations of COIs, licenses, and certifications.

#### Performance Dashboards

KPI summaries, completion rates, and trend analysis.

#### Corrective Action Management

Tools for documenting and closing compliance issues.

#### Quarterly Reviews

Verify compliance health and adjust standards based on evolving regulations.

### ADDED VALUE

Continuous oversight protects your organization from lapses, lawsuits, and downtime — while strengthening trust across your entire supply network.



# 07

## Evaluate & Improve

*Use data to evolve your onboarding process.*

The best programs don't just manage performance — they refine it.

Accoree provides detailed analytics to help you identify gaps, strengthen relationships, and continuously improve your supplier base.



### REVIEW QUARTERLY

#### Approval Timelines

Identify process bottlenecks and streamline future onboarding.

#### Compliance Trends

Track renewal adherence and identify areas of recurring risk.

#### Performance Benchmarks

Compare provider results across categories or regions.

#### Supplier Development Opportunities

Flag high performers for expanded roles or long-term contracts.

#### Internal Efficiency Metrics

Evaluate administrative workload reduction post-Accoree implementation.

### GOAL

Transform onboarding data into operational intelligence — a feedback loop that drives measurable improvement every quarter.

# Accoree

## Best Practices

*Turn onboarding into a strategic advantage.*

☐ **Centralize communication**

*Use Accoree's message center to document all provider correspondence.*

☐ **Standardize globally, refine locally**

*Maintain core standards enterprise-wide with flexible regional adaptation.*

☐ **Audit proactively**

*Generate reports directly from Accoree's dashboard to simplify audit preparation.*

☐ **Train continuously**

*Keep providers aligned through Accoree's Training & Development modules.*

☐ **Monitor leading indicators**

*Don't wait for issues — track early warning signs like slow approvals or expired credentials.*



# Partnering with Accoree

*From onboarding to optimization.*

Accoree doesn't just supply tools — we provide expertise.

Our team partners with your organization to customize workflows, configure compliance frameworks, and align provider management to your business goals.

## NEXT STEPS

### **Schedule a Process Review**

Our experts will audit your current onboarding and identify efficiency gains.

### **Explore Performance Tracking & Reporting**

Learn how data strengthens supplier relationships.

### **Contact Support**

[info@accoree.com](mailto:info@accoree.com)