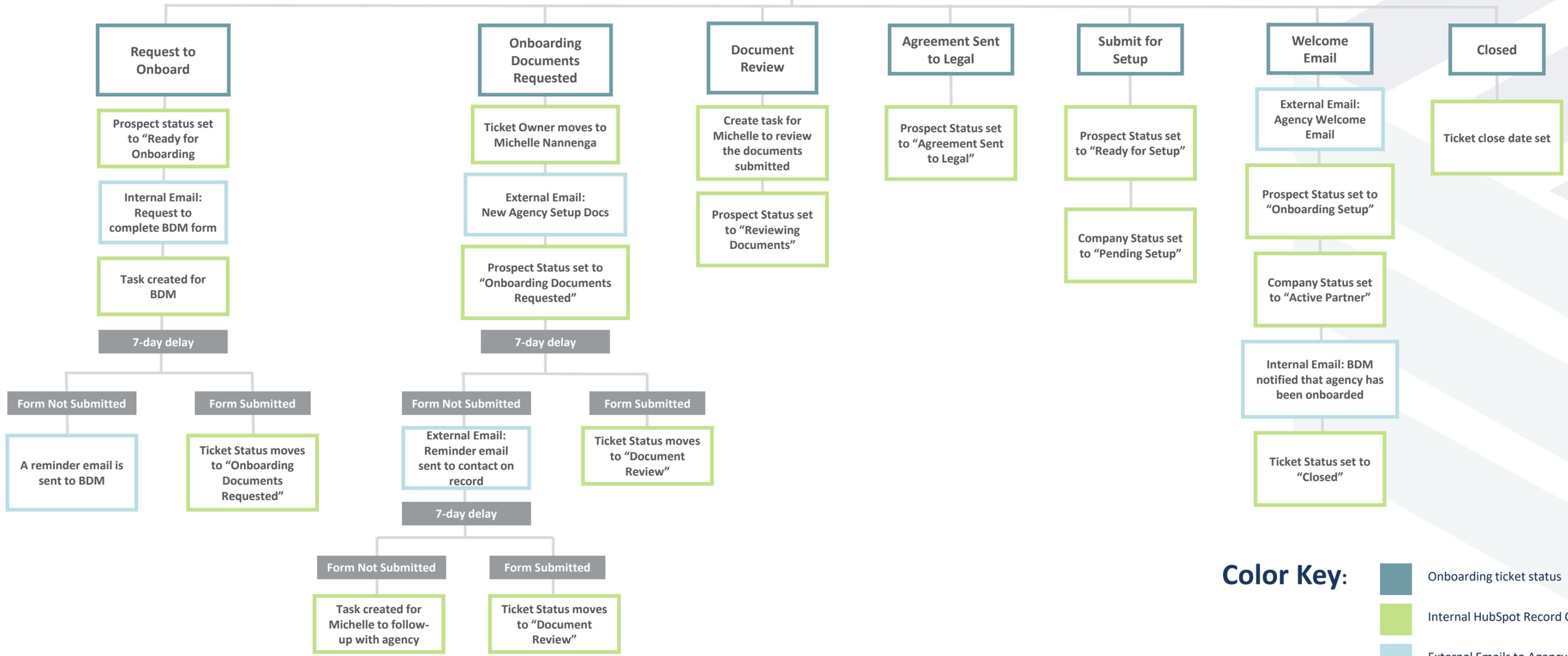# Onboarding Ticket Workflow

Open a new onboarding ticket
Provide information needed on the ticket and associate the company and main contact (make sure contact is added into HubSpot before opening ticket)

Standard naming convention:
"Company name - Onboarding

Request to Onboard

Prospect status set to "Ready for Onboarding

Internal Email: Request to complete BDM form

Task created for BDM

7-day delay

Form Not Submitted

A reminder email is sent to BDM

Form Submitted

Ticket Status moves to "Onboarding Documents Requested"

Onboarding Documents Requested

Ticket Owner moves to Michelle Nannenga

External Email: New Agency Setup Docs

Prospect Status set to "Onboarding Documents Requested"

7-day delay

Form Not Submitted

External Email: Reminder email sent to contact on record

7-day delay

Form Not Submitted

Task created for Michelle to follow-up with agency

Form Submitted

Ticket Status moves to "Document Review"

Form Submitted

Ticket Status moves to "Document Review"

Document Review

Create task for Michelle to review the documents submitted

Prospect Status set to "Reviewing Documents"

Agreement Sent to Legal

Prospect Status set to "Agreement Sent to Legal"

Submit for Setup

Prospect Status set to "Ready for Setup"

Company Status set to "Pending Setup"

Welcome Email

External Email: Agency Welcome Email

Prospect Status set to "Onboarding Setup"

Company Status set to "Active Partner"

Internal Email: BDM notified that agency has been onboarded

Ticket Status set to "Closed"

Closed

Ticket close date set

Color Key:

- Onboarding ticket status
- Internal HubSpot Record Change/Task Sent
- External Emails to Agency

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