GROUNDWORK AI
THE FUTURE OF BUSINESS, SIMPLIFIED.

CLIENT-FACING | INTERNAL | INTERNAL USE

Client Journey Flow

From signing to agent handoff — every document, every stage, in order.

PROSPECT

01

Scoping Charter

Define problem, scope, timeline & investment

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ONBOARDING

02

Onboarding Checklist

Collect access, contacts, inputs & expectations

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DISCOVERY

03

Discovery Framework

Diagnose bottlenecks & automation opportunities

INTERNAL

MAPPING

04

Process Map Template

Deep-dive one workflow: steps, pain, solution

INTERNAL

ENGAGEMENT

05

Communication Plan

6 touchpoints from kickoff to post-launch

INTERNAL

DELIVERY

06

Engagement Process

6-stage framework: Discovery to Optimization

INTERNAL

HANDOFF

07

Handoff Package

Build summary, instructions, ownership & next steps

CLIENT-FACING

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