ISABEL ASSIST

Welcoming a new client

Client onboarding and information organisation sample

Independent sample project. All businesses, people, situations and data are fictional.

Brief

A small business owner has agreed to a five-hour trial project to organise customer email handling. My role is to confirm the goal, request the necessary information and prepare a clear, secure working process.

Incoming email or task

Hi Isabel, I'd like to start the trial project. We run an online clothing shop, and most questions are about delivery and sizing. What do you need from me to get started? Best wishes, Liina

Verified scenario information

- The five-hour trial and its €125 final price have already been approved in a separate quotation within this scenario.
- Time is allocated to reviewing instructions, planning the inbox workflow, preparing three reply templates and writing a summary. Independently answering real customer enquiries is outside this initial stage.
- Access and confidentiality terms will be agreed before any real customer data is shared.

Prepared email

Subject: Next steps for our trial project

Hi Liina,

Thank you for choosing to work with me. I'd be happy to help create a clearer process for delivery and sizing enquiries.

To get started, please send links to your approved delivery information and size guides. Let me know who will approve the reply templates and who should handle exceptions. You can also include a couple of sample enquiries with personal details removed.

The trial will produce three reply templates, a proposed set of inbox labels and a short handover summary. Answering real customer enquiries will start only under a separate agreement.

Please don't send passwords by email. We'll agree the necessary access and data-handling arrangements before work begins.

Would it suit you to review the background information on 2 June and aim for handover on 4 June? We'll confirm the dates after your reply.

Best wishes,
Isabel
Isabel Assist

ISABEL ASSIST

Trial project work plan

Sample business Isabel Assist

Sample project. The proposed dates, 2 and 4 June 2027, require client confirmation. The five-hour scope does not include an unlimited number of emails.

Five-hour allocation

Task	Time	Deliverable
Review background and boundaries	1 hour	Approved instructions and decision boundaries
Plan inbox organisation	1 hour	Labels, statuses and owners
Prepare three reply templates	2 hours	Delivery, sizing and missing information
Feedback and handover	1 hour	Revised templates and work summary

Getting started checklist

- The client confirms the goal, deadlines, price and billing arrangement.
- Delivery information and size guides are available, and a responsible contact is named.
- Personal data has been removed from sample enquiries. Necessary data-handling terms are agreed.
- If needed, a separate user account with limited permissions is created; passwords are not shared by email.
- Reply templates are sent to the client for review before use.

Handover and next step

At completion, I will hand over three templates, proposed inbox labels and a work summary. I will ask for feedback and separately discuss whether the client wants ongoing support. Additional work does not start automatically.

This is a fictional collaboration sample. The document does not create a real contract, account, access permission or payment obligation.