

MERIDIAN ADVISOR PLATFORM

The Onboarding Program

How a repeatable client onboarding system was designed, assembled, and run

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Illustrative work sample. Reproduces the architecture of a client onboarding program I designed and ran across a multi-year platform rollout. Company, partners, and detail are fictional.

Two onboards, not one

Signing the firm is the easy half. The advisors inside it don't report to you and can ignore you.

ONBOARD ONE

The firm

- Contracts and partner agreements
- Data ingestion from the service provider
- Platform configuration and access
- Reporting and operational handover

Finite, contractual, and largely in our control.

ONBOARD TWO

The advisors

- Awareness that the platform exists at all
- Training and competency to use it
- Confidence to raise it with a client
- Sustained use after the launch noise fades

Voluntary, behavioural, and entirely dependent on influence.

The program had to solve both. Most of its machinery exists for the second one.

What the program is made of

Four pillars. Each one is a body of work, not a document.

Playbooks

- Quick start checklist
- General playbook by service provider
- Full-coverage playbook

Program

- Onboarding guide and FAQs
- Best practices and firm communications
- Deliverables, timelines, and templates
- Status and executive reporting

Management Process

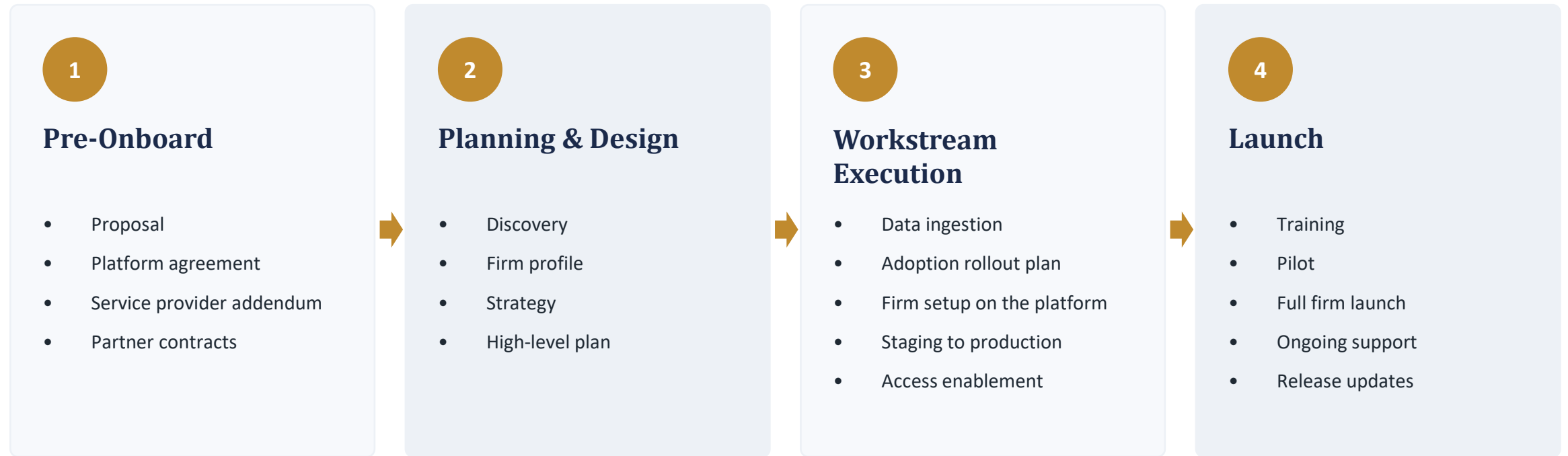
- Plan templates by service provider
- Weekly workstream and firm cadence
- Milestone tracking and escalation
- Library and calendar upkeep

Customer Journey

- Welcome and firm experience map
- Kickoff agendas and decks
- Individual firm files and plans
- Exit and handover package

How the work is sequenced

Four categories, running left to right, each gating the next.



Phase II — advisors outside the primary service provider population — is flagged during Planning and initiated after launch.

The onboarding library

Eight topic areas, each with its own narrative, templates, and worked examples.

1

Overview and how it works

The orientation document for anyone new to the program

2

Proposal and legal contracts

Every agreement, who issues it, and what it unlocks

3

Discovery, profile, and strategy

Questionnaire, findings, and the approach document

4

Workstream roles and plans

Who owns what, and each workstream's own plan

5

Data ingestion and access

Feeds, validation gates, and single sign-on enablement

6

Platform configuration

Firm attributes, staging to production, activation

7

Advisor adoption

Content catalogue, audience layers, rollout calendar

8

Ongoing support

Monitoring, reporting, release updates, escalation

Versioned and published centrally. The program manager selects the current version for each firm.

The adoption content system

Once a firm is live, it selects from a catalogue and makes the material its own.

Firm-facing onboarding kit

ORGANIZED BY ROLLOUT STAGE

- Planning stage — what the firm will be deploying
- Launch stage — announcements and deployment guidance
- Reviewed and compliance-approved before anything reaches an advisor

Advisor-facing resource page

ORGANIZED BY PRODUCT

- Full suite of tools and education by product line
- Advisors take what they need, when they need it
- Client-facing scripts and handouts alongside training material

Catalogue

Firm selects

Compliance approves

Customized

Calendared

Who talks to whom

Four relationship layers, each with a different owner and a different job.

1	Program to Firm	Home office experience — catalogue, resource links, approvals
2	Firm to Advisor	Awareness, in the firm’s own voice and channels
3	Relationship Manager to Advisor	Coaching, training, and confidence once access is live
4	Advisor to Client	Scripts and materials that turn access into conversations

The advisor journey runs Aware → Able → Active. Each layer moves them one step.

What the system actually consists of

Built once, reused on every engagement.

24

numbered templates

Every deliverable in the process,
versioned and indexed

8

phases

Each with entry and exit criteria
and a named owner

3

plan templates

One per service provider path,
tailored per firm

4

audience layers

Each with its own content set and
cadence

Plus the playbook, the internal training curriculum, and a published library the whole team works from.

The system changed as we used it

A program that never changes is a program nobody is running.

Nine phases became eight

Exit was three tasks that belonged inside Completion. Consolidating removed a handoff that was creating confusion about who owned the close.

Plan templates split by service provider

One generic template forced too much deletion on every onboard. Splitting it meant starting closer to the answer.

Timeline tiers introduced

Scoping firms into 30, 60, 90-day or custom at kickoff turned out to be the single biggest predictor of whether a plan held.

Content moved from attachments to a resource page

Firms could review and approve on their own schedule instead of waiting on us to send the next thing.

The point of the system

Any onboarding manager can pick up a firm and run it the same way — without me in the room, and without relearning the process from the last person who did it.