ALAI Client Onboarding — Runbook

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Version: 1.0 **Created:** 2026-07-28 **Owner:** John (AI Director) / Alem Basic (CEO) **Source process:** processes/client-onboarding.md, processes/quick-ref/client-onboarding-quickref.md **Tooling:** `node ~/system/tools/onboard-client.js`, Skill `onboard-client`

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1. Purpose

Every new ALAI client goes through 7 mandatory phases before development starts. **No phase is skipped.** Each phase has an owner, a required output, and a gate condition that must be true before moving to the next phase.

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2. The 7 Phases

```
Phase 1: First Contact       -> gate: qualified lead
Phase 2: Discovery           -> gate: brief approved by client
Phase 3: NDA                 -> gate: NDA signed
Phase 4: Proposal            -> gate: proposal accepted
Phase 5: Contract            -> gate: contract signed + first payment
Phase 6: Project Setup       -> gate: project scaffolded + kick-off done
Phase 7: Development Start   -> SDLC pipeline takes over (processes/sdlc/)
```

#	Phase	Owner	Timeline	Gate
1	First Contact	BizDev	Respond within 24h	Lead qualified, discovery call booked

#	Phase	Owner	Timeline	Gate
2	Discovery	BA + PO	1-3 days	Project Brief written and approved by client
3	NDA	John	1 day	NDA signed by both sides
4	Proposal	PO + Tech Lead	3-5 days	Client accepts proposal in writing
5	Contract	John	2-3 days	Contract signed both sides + first payment received (if milestone-based)
6	Project Setup	John + SM	1 day	Project scaffolded, kick-off held, backlog created, all access granted
7	Development Start	SM + Tech Lead	Ongoing	N/A — SDLC and sprint cadence take over

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3. Phase Detail

Phase 1 — First Contact

- Client reaches out (email, referral, direct)
- Record: name, company, contact, how they found us
- Quick qualification check: is budget/scope/timeline realistic?
- Qualified -> schedule Discovery Call. Not qualified -> polite decline with referral if possible.
- **Output:** `clients/<CLIENT>/intake/first-contact.md`, lead status set qualified/not qualified

Phase 2 — Discovery

- Discovery call/meeting with client
- Understand: problem, goals, users, budget, timeline
- Define project type (web app, mobile app, API, landing page, etc.) and candidate tech stack
- Write the Project Brief (client info, problem, proposed solution, users, platforms, top 5-10 features, integrations, budget range, timeline, success metrics)
- **Output:** `clients/<CLIENT>/intake/discovery-notes.md`, `clients/<CLIENT>/intake/project-brief.md`

Phase 3 — NDA

- Fill NDA template (`legal/nda-template.md`) with client details
- Send to client for signature via Documenso (skill: `send-for-signing`)
- Store signed copy
- **Output:** `clients/<CLIENT>/legal/nda-signed.md` + signed PDF
- **Hard rule:** technical details and access credentials are NOT shared before NDA is signed.

Phase 4 — Proposal

- Based on Project Brief, define: scope of work, tech stack decision (with rationale), phases/milestones, timeline, pricing (fixed/hourly/milestone), explicit in-scope vs out-of-scope, assumptions, validity period
- Review by John, then present to client
- **Output:** `clients/<CLIENT>/intake/proposal.md`

Phase 5 — Contract

- Fill Contract template (`legal/contract-template.md`): scope from proposal, payment terms, IP ownership, warranties
- IP ownership must be explicitly decided (client owns all / ALAI retains framework+tooling / license)
- Send for review and signature
- Receive first payment if milestone-based
- **Output:** `clients/<CLIENT>/legal/contract-signed.md` + signed PDF

Phase 6 — Project Setup

- Scaffold client directory:

```
mkdir -p
clients/<CLIENT>/{intake,legal,docs,src,designs,tests,comms/channels/standups,comms/meetings,comms/decisions,deployments}
```

- Create `project.json` (name, type, description, tech_stack, platforms, team, phases, budget, timeline)
- Kick-off meeting: client + PO + Tech Lead + John — cover scope/milestones, communication channels, access & credentials, sprint cadence, escalation path. Notes -> `clients/<CLIENT>/comms/meetings/kick-off.md`
- PO creates initial backlog from scope, prioritized (MoSCoW or numeric)
- **Output:** scaffolded directory, `project.json`, kick-off notes, initial backlog

Phase 7 — Development Start

- Sprint Planning (first sprint)
- Tasks assigned to agents per RACI
- SDLC pipeline (`processes/sdlc/`) takes over
- Daily standups logged in `comms/channels/standups/`

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4. Client Directory Structure

Full standard: processes/client-document-structure.md

```
clients/<CLIENT>/
├── intake/
│   ├── first-contact.md
│   ├── discovery-notes.md
│   ├── project-brief.md
│   ├── proposal.md
│   ├── client-materials/        <- everything client provides, with README index
│   └── correspondence/
├── legal/
│   ├── drafts/
│   └── signed/
├── docs/{specs,research}/
├── designs/
├── src/
├── tests/
├── comms/{channels/standups,meetings,decisions}/
├── deployments/
└── project.json
```

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5. RACI

Activity	BizDev	BA	PO	Tech Lead	SM	John	Alem
First Contact	**R**	I	I	-	-	A	I
Discovery	C	**R**	**R**	C	-	A	I
NDA	-	-	-	-	-	**R/A**	I
Proposal	-	C	**R**	**R**	-	A	**A**

Activity	BizDev	BA	PO	Tech Lead	SM	John	Alem
Contract	-	-	-	-	-	**R**	**A**
Project Setup	-	-	I	C	**R**	**R/A**	I
Kick-off	-	C	**R**	**R**	**R**	A	I

R = Responsible, A = Accountable, C = Consulted, I = Informed

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6. Automation Hooks

1. Novi lead -> creates `clients/<CLIENT>/intake/` + notifies BizDev
2. Brief approved -> triggers NDA template fill
3. NDA signed -> triggers Proposal creation
4. Proposal accepted -> triggers Contract fill
5. Contract signed -> triggers Project Setup scaffold
6. Kick-off done -> `project-workflow.js init`

Guided end-to-end execution: `node ~/system/tools/onboard-client.js` or Skill `onboard-client` (7-phase interactive workflow).

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7. Hard Rules

- Mandatory for every client, no exceptions.
- NDA before any technical detail is shared.
- Alem approves every contract and every proposal (Accountable).
- Pricing decided by Alem — team prepares options, does not set the number.
- Cloud/tenant resources for this client go in the client's own tenant tree (`~/clients-external/<client>/`), never mixed with another tenant.

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8. Related Documents

- processes/client-onboarding.md — full source process
- processes/quick-ref/client-onboarding-quickref.md — 1-page version
- processes/client-document-structure.md
- processes/sdlc/ — what happens after Phase 7

- ALAI-CLIENT-INVOICE-CYCLE.md — billing once client is active
- ALAI-CLIENT-INCIDENT-RESPONSE.md — support once client is live

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Document Location: `~/ALAI/processes/runbooks/ALAI-CLIENT-ONBOARDING.md` **Access Control:** INTERNAL

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