

/onboard-client

Source: `~/ .claude/skills/onboard-client/SKILL.md`

Onboard Client — Guided Client Onboarding Workflow

Description

Vodeni workflow za onboarding novog klijenta kroz 7 faza. Od prvog kontakta do početka developmenta. Svaka faza ima gate koji mora biti zadovoljen prije prelaska na sljedeću.

Trigger

Koristi ovaj skill kad:

- Alem kaže "novi klijent", "new client", "imamo novog klijenta"
- Novi lead treba biti pretvoren u klijenta
- Klijent postoji ali je zapeo u nekoj fazi (nastavak procesa)

Alati

- **Onboarding:** `~/system/tools/onboard-client.js`
- **Pipeline:** `~/system/tools/sales-pipeline.js`
- **Contacts:** `~/system/tools/contacts.js`
- **Documents:** `~/system/tools/docusign.js`
- **Signing:** `~/system/tools/send-signing-email.js`
- **Drafts:** `~/system/tools/drafts.js`
- **CRM:** `~/system/tools/unified-crm.js`

- **Tasks:** `node ~/system/tools/mc.js`
- **Scaffold:** `bash ~/system/template/scaffold.sh`
- **Proces doc:** `~/ALAI/processes/client-onboarding.md`

Workflow

Korak 0: Detektuj stanje

Prije bilo čega — provjeri da li klijent već postoji:

```
# Provjeri contacts
NODE_PATH=~/system/node_modules node ~/system/tools/contacts.js search "<ime>"

# Provjeri pipeline
NODE_PATH=~/system/node_modules node ~/system/tools/sales-pipeline.js list

# Provjeri projekte
ls ~/projects/ | grep -i "<ime>"
```

- Ako klijent postoji → pitaj Alema u kojoj je fazi i nastavi od tamo
- Ako ne postoji → počni od Faze 1

Korak 1: First Contact (Faza 1)

Cilj: Zabilježi prvog kontakta, kvalificiraj lead

Prikupi podatke interaktivno od Alema:

1. **Ime klijenta** (osoba ili firma)
2. **Email**
3. **Firma** (ako je osobni kontakt)
4. **Izvor** (referral, inbound, linkedin, upwork, cold_email, website)
5. **Projekt tip** (web app, mobile, AI, consulting, automation)
6. **Estimacija vrijednosti** (NOK)
7. **Kratak opis** projekta

Kreiraj lead i kontakt:

```
# Dodaj u pipeline
NODE_PATH=~/system/node_modules node ~/system/tools/sales-pipeline.js add "<ime>" "<email>"
"<izvor>" "<opis>"
```

```
# Dodaj u contacts
NODE_PATH=~/system/node_modules node ~/system/tools/contacts.js add "<ime>" "<email>" --
company "<firma>" --type client --notes "New lead: <opis>"
```

Gate: Lead kreiran, kontakt dodan, discovery poziv zakazan **Output:**

```
~/ALAI/clients/<CLIENT>/intake/first-contact.md
```

Korak 2: Discovery (Faza 2)

Cilj: Razumij problem, ciljeve, budget, timeline

Generiši discovery pitanja za meeting:

- Koji problem rješavamo?
- Ko su korisnici?
- Koje platforme (web, mobile, desktop)?
- Koji budget range?
- Koji timeline?
- Koje integracije trebaju?
- Koji su success metrics?

Nakon discovery call-a:

1. Kreiraj `project-brief.md` sa 10 sekcija (iz procesa)
2. Pošalji brief klijentu na potvrdu
3. Advance lead u pipeline:

```
NODE_PATH=~/system/node_modules node ~/system/tools/sales-pipeline.js advance <lead-id>
"Discovery complete, brief sent"
```

Gate: Brief napisan, klijent potvrdio **Output:** `~/ALAI/clients/<CLIENT>/intake/discovery-notes.md`,
`project-brief.md`

Korak 3: NDA (Faza 3)

Cilj: Potpiši NDA prije dijeljenja detalja

```
# Kreiraj NDA od template-a
NODE_PATH=~/system/node_modules node ~/system/tools/docusign.js create "<CLIENT>" nda --field
CLIENT_NAME="<ime>" --field CLIENT_EMAIL="<email>"

# Pošalji na potpis koristeći /send-for-signing workflow
```

```
# → Vidi skill: send-for-signing
```

OBAVEZNO: Koristi `/send-for-signing` skill za slanje. NIKAD ručno.

Gate: NDA potpisan od obje strane **Output:** `~/ALAI/clients/<CLIENT>/legal/nda-signed.pdf`

Korak 4: Proposal (Faza 4)

Cilj: Definiši scope, tech stack, faze, pricing

Proposal sadrži 10 sekcija:

1. Executive Summary
2. Scope of Work
3. Tech Stack
4. Project Phases
5. Timeline
6. Pricing (sa MVA 25% ako NOK)
7. Payment Schedule
8. Out of Scope
9. Assumptions
10. Validity Period

CEO GATE: Proposal MORA biti odobren od Alema prije slanja!

- Pokaži Alemu: scope, pricing, timeline
- Čekaj eksplicitno "GO" ili "SEND"
- NIKAD slati bez odobrenja (ZAKON #2)

```
# Advance pipeline
NODE_PATH=~/system/node_modules node ~/system/tools/sales-pipeline.js advance <lead-id>
"Proposal sent, awaiting response"
```

Gate: Klijent prihvatio proposal (pisana potvrda) **Output:**

```
~/ALAI/clients/<CLIENT>/intake/proposal.md
```

Korak 5: Contract (Faza 5)

Cilj: Potpiši ugovor, primi prvu uplatu

1. Kreiraj ugovor od template-a:

```
NODE_PATH=~/system/node_modules node ~/system/tools/docusign.js create "<CLIENT>" contract --
field CLIENT_NAME="<ime>"
```

- Pošalji na potpis: `/send-for-signing` workflow
- Kreiraj prvu fakturu:

```
NODE_PATH=~/.system/node_modules node ~/.system/tools/invoice-generator.js create "<CLIENT>"  
<iznos> NOK "Project kickoff payment"
```

Gate: Ugovor potpisan, prva uplata primljena **Output:** `~/ALAI/clients/<CLIENT>/legal/contract-signed.pdf`

Korak 6: Project Setup (Faza 6)

Cilj: Scaffoldaj projekat, kreiraj backlog

```
# Full onboard (scaffold + lead + routing + MC task)  
NODE_PATH=~/.system/node_modules node ~/.system/tools/onboard-client.js new "<slug>" "<email>"  
"<izvor>" "<vrijednost>" "<opis>"  
  
# Ili samo scaffold  
bash ~/.system/template/scaffold.sh "<ProjectName>"
```

Kick-off agenda:

- Scope review
- Communication channels
- Access/credentials
- Sprint cadence
- Escalation path

Gate: Projekt scaffoldan, kick-off održan, backlog kreiran **Output:** `~/projects/<slug>/project.json`, kick-off notes

Korak 7: Development Start (Faza 7)

Cilj: Počni sprint, delegiraj zadatke

```
# Advance pipeline to WON (requires --approved flag)  
NODE_PATH=~/.system/node_modules node ~/.system/tools/sales-pipeline.js advance <lead-id>  
"Contract signed, project started" --approved  
  
# Kreiraj MC task za projekat  
node ~/.system/tools/mc.js add "<CLIENT>: Sprint 1 planning" --priority H --route backend
```

Gate: First sprint isplaniran, taskovi dodijeljeni **Output:** Sprint backlog, MC taskovi

Pravila

1. **Faze se NE preskakaju** — NDA mora biti potpisan prije Proposal-a
2. **CEO odobrava Proposal** — ZAKON #2: NIKAD slati pricing bez Alemovog odobrenja
3. **Pipeline advance = gate pass** — Advance lead SAMO kad je gate zadovoljen
4. **Test first za signing** — Svaki dokument na potpis → test na post@alai.no prvo
5. **Kontakt podatke NE izmišljaj** — Ako nemaš email, pitaj Alema
6. **WON stage = contract signed** — sales-pipeline.js enforce-a --approved flag
7. **Sve NOK fakture sa MVA 25%** — invoice-generator.js auto-dodaje
8. **ALAI branding** — Svi dokumenti, emailovi, fakture sa ALAI brandingom

Primjer — Kompletni Onboarding

Alem: "Imamo novog klijenta – TechCorp, kontakt je Lars Olsen, lars@techcorp.no, došao preko LinkedIn. Žele AI chatbot za customer support."

John:

1. `contacts.js add "Lars Olsen" "lars@techcorp.no" --company "TechCorp AS" --type client`
2. `sales-pipeline.js add "TechCorp AS" "lars@techcorp.no" "linkedin" "AI chatbot for customer support"`
3. → Discovery call zakazan
4. → Brief napisan, klijent potvrdio
5. → NDA potpisan (send-for-signing flow)
6. → Proposal napisan, Alem odobrio, klijent prihvatio
7. → Contract potpisan, prva uplata stigla
8. → `onboard-client.js new "techcorp" "lars@techcorp.no" "linkedin" "150000" "AI chatbot"`
9. → Sprint 1 kreiran, agenti dodijeljeni

Status Tracking

U svakom momentu možeš provjeriti status:

```
# Pipeline pozicija
NODE_PATH=~/.system/node_modules node ~/.system/tools/sales-pipeline.js show <lead-id>

# Onboarding timeline
```

```
NODE_PATH=~/.system/node_modules node ~/.system/tools/onboard-client.js timeline "<client>"
```

```
# CRM overview
```

```
NODE_PATH=~/.system/node_modules node ~/.system/tools/unified-crm.js client "<client>"
```

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