ClearDesk

Client readiness checklist

Complete this checklist before your discovery call or five-day workflow pilot. It helps us define a safe, practical scope without requesting unnecessary access.

BUSINESS NAME	PRIMARY CONTACT	DATE

1 Business information

- [ ] Confirm your business name, services, working hours and primary contact.
- [ ] Prepare the approved service list and current pricing.
- [ ] Identify who is authorised to approve exceptions.

2 Workflow

- [ ] Choose one workflow: inbox, enquiries, appointments, documents or follow-up.
- [ ] Estimate the weekly volume of messages, tasks or documents.
- [ ] List common questions and approved responses.
- [ ] Identify tasks that must remain owner-only.

3 Access and permissions

- [ ] Create delegated or limited access wherever possible.
- [ ] Enable two-factor authentication on business accounts.
- [ ] Prepare a dedicated shared folder instead of sharing an entire drive.
- [ ] Decide how access will be revoked when the engagement ends.

4 Tools and records

- [ ] Gather existing quotation, invoice and email templates.
- [ ] List the calendar, email, messaging and storage tools currently used.
- [ ] Identify outstanding enquiries and follow-ups to include in the pilot.

5 Success and reporting

- [ ] Define the result expected after five working days.
- [ ] Agree on response-time targets.
- [ ] Choose the weekly report recipients.
- [ ] Confirm escalation contacts and channels.

Keep access safe

Do not send passwords, one-time codes, banking credentials or sensitive client records through the website form. ClearDesk agrees scope and permissions before operational access is requested.