

Onboarding Instructions

Exactly what happens after you approve a quote, what we need from you, and when. Keep this to hand for the first few weeks.

Before we start: what to have ready

- The name of one person who can make decisions quickly
- Login access (or an invite) for the tools we are connecting
- Your current quote, invoice and email wording, even if it is messy
- A rough idea of your busiest days, so testing avoids them

Week by week

1 **Week 1 — Discovery**

A 45-minute call where you walk us through the work as it happens today. We record the steps and send you a one-page map to confirm.

2 **Week 1-2 — Plan agreed**

You get the written plan: what gets automated, in what order, and what changes for your team. Nothing gets built until you say yes.

3 **Week 2-3 — Build**

We build quietly in the background. Your current process keeps running untouched, so there is no risk to trading.

4 **Week 3-4 — Your review**

You use it on real work for a few days. Tell us anything that feels awkward and we change it — that round of feedback is included.

5 **Week 4 — Go live**

We switch it on properly, walk your team through it, and hand over written instructions in plain English.

6 **After go-live — Aftercare**

We watch it for the first month, fix anything that misbehaves, and check in on what else could come off your plate.

Your client portal

You get a login at clarityaiireland.ie/portal. Sign up with the same email address we quoted, and you can see your quotes, approve them with one click, follow every step of the job on a progress tracker, download invoices, and keep your contact details up to date.

How to reach us

- Anything urgent: ring 089 223 1620
- Everything else: clarityaiireland@gmail.com — we answer within one working day
- Changes and requests: message us through the portal so they stay on the record

Our side of the bargain

Plain English, no jargon, no surprise invoices. If we think something is not worth automating, we will say so. If something breaks, we fix it. And the price agreed on your quote is the price you pay.