

New Fleet Client Onboarding

Standard Operating Procedure for signing up and setting up business clients with bike fleets

SOP NO. VBW-SOP-04	VERSION 1.0	OWNER Shop Manager	REVIEW Every 6 months
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1. Purpose

This procedure explains how Vantorrel Bike Works takes on a new fleet client, from the first conversation to the first scheduled service visit. Following the same steps every time means each client gets a clear agreement, an accurate record of their bikes and a service plan they understand before any work begins.

2. Scope

This SOP applies to any business that wants regular maintenance for five or more bikes, such as delivery services, rental shops, hotels and workplaces with shared bikes. It does not cover walk-in repairs or one-off custom builds, which follow VBW-SOP-01 and VBW-SOP-02.

3. Definitions

- **Fleet client:** a business with a service agreement covering five or more bikes.
- **Fleet tag:** the numbered sticker fitted to each bike so it can be matched to its records.
- **Fleet register:** the list of every tagged bike, its serial number and its service history.
- **Urgent repair:** any fault that makes a bike unsafe to ride, such as worn brakes or a damaged frame.

4. Roles and timing at a glance

Stage	Owner	When	Output
Discovery call	Shop Manager	Day 1	Completed intake form
Fleet inspection	Lead Mechanic	Within 5 working days	Inspection sheet per bike
Proposal and agreement	Shop Manager	Within 2 days of inspection	Signed service agreement
Account setup	Front Desk	Same day as signing	Client file and billing profile
First service visit	Lead Mechanic	Agreed start date	Service report sent to client

5. Procedure

1. **Log the enquiry.** Create a lead in the client tracker on the day the enquiry arrives. Record the business name, contact person, phone, email and roughly how many bikes they run.
2. **Hold the discovery call.** Use the intake form to ask how the bikes are used, how many hours a day they ride, where they are stored and what problems the client has had so far.
3. **Book the fleet inspection.** Agree a time to inspect the bikes at the client's site or at the shop. Send a calendar invite with the address and an estimate of how long it will take.
4. **Inspect and tag each bike.** Fit each bike with a numbered fleet tag. Fill in one inspection sheet per bike covering frame, brakes, drivetrain, wheels, tires and lights, and take a photo of the serial number.
5. **Prepare the proposal.** Using the inspection notes, recommend a service interval, list any urgent repairs separately and quote the monthly rate from the current price sheet.
6. **Walk the client through it.** Go over the proposal by phone or in person. Answer questions, adjust the plan if needed and confirm that urgent repairs are approved before they are scheduled.

7. **Get the agreement signed.** Send the service agreement for signature. Do not book routine work until the signed copy is saved to the client file.
8. **Set up the account.** Create the client file, add every tagged bike to the fleet register, set up the billing profile and record the client's preferred contact method.
9. **Schedule the first visit.** Book the first service visit and the next three recurring visits. Send the client a welcome email with the dates and the shop's contact details.
10. **Close out onboarding.** After the first visit, send the service report and mark the client as Active in the tracker. Review the account with the client after 30 days.

6. Onboarding checklist

Tick each item before marking a client as Active.

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| ☐ Lead logged in the client tracker | ☐ Service agreement signed and filed |
| ☐ Intake form completed and saved | ☐ Bikes added to the fleet register |
| ☐ Every bike tagged and photographed | ☐ Billing profile set up |
| ☐ Inspection sheet saved for each bike | ☐ First four visits scheduled |
| ☐ Proposal sent and reviewed with the client | ☐ Welcome email sent |
| ☐ Urgent repairs approved in writing | ☐ 30-day review booked |

7. Records and review

Keep the intake form, inspection sheets, signed agreement and first service report in the client file for as long as the client is active and for two years after. The Shop Manager reviews this SOP every six months, or sooner if the process changes, and records each change in the version history.

Version history

Version	Date	Change	Approved by
1.0	October 2026	First issue	Shop Manager