

Step Number	Step Name	Description	Responsible Person	Input/Trigger	Output/Deliverable	Notes or Improvements
1	Define Service	Clearly describe the service scope		Customer inquiry/contract	Service scope document	Ensure clarity on deliverables
2	Client Onboarding	Gather requirements and set expectations		Customer agreement/initial meeting	Onboarding checklist	Use standardized forms to save time
3	Project Planning	Plan deliverables, timeline, resources		Onboarding completion	Project plan	Confirm resource availability
4	Execution	Perform service delivery tasks		Approved project plan	Status updates/partial deliverables	Track progress regularly
5	Review & Quality Check	Audit deliverables for quality		Completed deliverables	Quality report	Establish quality standards
6	Delivery & Handover	Deliver final product/service to client		Passed quality check	Final deliverable	Provide support/training if needed
7	Feedback & Closure	Collect client feedback, close project		Client receipt of deliverable	Feedback form and project closure report	Use feedback to improve next cycle



Cerebral Ops is a growth consulting firm focused on serving B2B SaaS companies that are seeking tech-enabled, AI leveraged RevOps Rebuild. Get in touch for a free audit of your current systems.