**HerNest**

*Human Centered Data Ecosystem*

**Onboarding Checlklist**

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**📖 HOW TO USE THIS TEMPLATE**

**What This Is**

Checklist for onboarding partners.

**How to Use**

* Check items as complete
* Assign tasks
* Track dates
* File when done

**Tips**

* Set realistic timelines
* Communicate regularly

**📝 ABOUT PLACEHOLDERS**

* [Organization Name] → Your organization name
* [Your Name] → Your actual name
* [Date] → Actual date
* HerNest or [HerNest] → Keep as is (ecosystem name)
* Any [BRACKETED TEXT] → Your information

**📄 TEMPLATE CONTENT**

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**HerNest Subscription Onboarding Package**

For Businesses, Non-profits, and Donor Subscribers

**1. Pre-Onboarding Stage (Engagement & Negotiation)**

Objective: Confirm interest, understand needs, and prepare for a smooth subscription start.

Checklist:

Initial Contact & Discovery Call

Understand their objectives, needs, and which HerNest model applies (Non-profit portfolio support / Business Framework / Donor Partnership).

Gather background info (industry, size, target audience, current challenges).

Needs Assessment Form (sent & completed)

Service/Partnership Proposal tailored to their needs

Negotiation Meeting (terms, deliverables, pricing/benefits)

Draft MOU / Service Agreement sent for review

Decision & Confirmation Email

**2. Documentation & Compliance Stage**

Objective: Protect HerNest’s IP, clarify use rights, and formalize the relationship.

Checklist:

Signed MOU / Service Agreement (digital or physical)

Non-Disclosure Agreement (NDA)

Intellectual Property & Licensing Form (IP protection, licensing terms for HerNest’s framework model, templates, and resources)

Framework Model Access Agreement (covers usage rights of HerNest methodologies, VIT models, marketing framework)

Data Privacy & Usage Consent (for data-driven services, impact reporting, and shared analytics)

Donor/Partnership Policy (if applicable)

**3. Welcome & Resource Handover Stage**

Objective: Provide them with everything they need to start using HerNest’s services immediately.

Checklist:

Welcome Email & Introductory Packet (digital) containing:

HerNest Overview & Impact Statement

Overview of subscribed services

Access instructions for HerNest tools/templates/frameworks

Key contact points (Program Officer, Impact & Community Manager, BDM)

Support request channels & SLA (service level agreements)

Onboarding Call/Orientation Session

Access to Tools & Resources:

Relevant templates (MOUs, SOPs, HR forms, etc.)

Policy & Process templates

Marketing Framework documents

Training schedules & learning portal login (if applicable)

Portfolio Sharing Instructions (for non-profits)

**4. Implementation & First 30 Days Support Stage**

Objective: Ensure they are using the tools and engaging with HerNest support.

Checklist:

Confirm resource downloads & access

Guide them in customizing frameworks to their organization

Set First 90 Days KPIs (impact, community engagement, or operational milestones)

Schedule monthly check-in calls for the first quarter

Track usage & engagement reports

**5. Onboarding File for Internal Use**

For the BDM to keep internally after onboarding:

Needs Assessment Form (completed)

Signed legal documents (MOU, NDA, IP forms, licensing agreements)

Subscription Tier details (Free, Basic, Premium)

Assigned HerNest point of contact

Initial KPI tracker

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*HerNest • Empathy First • Truth as Foundation • Sustainable Impact • Capacity, Not Dependency*