

# YOUR FIRST 90 DAYS

At Hatch, onboarding is more than just paperwork. It's about creating a strong foundation and making sure you feel supported whilst we get to know you and your business. You'll always know what we need from you, and when.

**Month  
1**

## Welcome

We'll kick things off with an introductory call with Lloyd before getting your Hatch Portal and proposal set up. Milly will guide you through the onboarding process, collect any key information and compliance documents needed, and begin professional clearance (if applicable).

**What we'll need from you:**  
ID documents, company details, previous accountant details (if applicable)

## Setting things up

Behind the scenes we'll get everything set up and running smoothly. From HMRC authorisations and tax registrations to Xero access, onboarding checks and billing setup.

**What we'll need from you:**  
HMRC approvals completed promptly, Xero access confirmation

**Month  
2**

**Month  
3**

## Ready to go!

As onboarding wraps up, we'll confirm processes, responsibilities and next steps before transitioning you into ongoing support with the Hatch team. By this stage, everything will be fully connected and ready to support your business as it grows.

**What we'll need from you:**  
Attend onboarding review call, confirm preferred communication process

