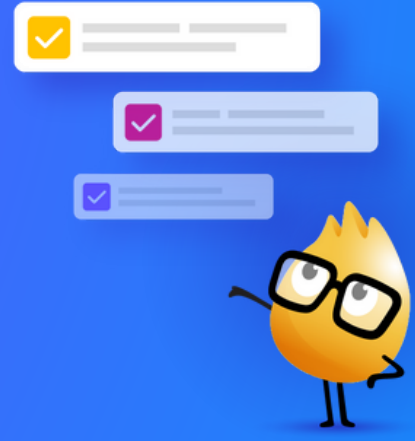


# Customer Onboarding Checklist

This sample checklist for SaaS providers gives sales and CX managers, as well as revenue and CX department heads, with a sample step-by-step plan for effective customer onboarding. From initial engagement to ongoing support, this checklist covers some essential steps to create a better customer experience, boost time to value, and lower customer churn.

*Please note: the examples included in this checklist are not exhaustive. This resource is meant to be customized for your specific industry, company, or onboarding needs.*



## Customer Onboarding Kick-Off

- Identify key stakeholders
- Agree on key milestones and timeframes
- Establish MVP/ project charter
- Identify potential challenges
- Risk assessment based on as-is analysis
- Determine and assign permissions access, if needed

## Customer Onboarding Planning

- Confirm system requirements – APIs, integrations, SSO, etc.
- Pre-plan team structure
- Map out user life cycle (i.e. creating/managing/archiving users)
- Develop delivery plan based on user end-to-end journey
- Develop internal support workflow based on number of account owners with access, and/or which users may have support needs
- Develop communication and change management strategy

## Customer Learning Journey

---

- Administrators and/or account owners to complete minimum required product training
  - Administrators and/or account owners complete self-guided navigation and familiarization with product
  - End-Users receive product training from administrators and/or account owners
- 

## Building the Customer Experience

---

- Configure account settings - for example: Dashboard, Profile Information, Theme, Brand, Roles and Permissions, Messages & Settings, Email, etc.
  - Configure API and integrations - enable, review, and test
  - Enable features, as needed
  - Import users and assign team leader/admin permission roles, as needed
  - Complete imports and manual account permissions (if applicable)
  - Customize UI and notification settings (if applicable)
  - Complete historical data migration (if required)
  - Use case testing - run through the process end-to-end to confirm all is working as expected
  - Make it easy for users to problem solve independently and provide escalation if needed
  - Develop user FAQs and support model
- 

## Launch Customer Onboarding

---

- Implement communication and change management strategy
  - Conduct a pilot (optional) and post- roll out debrief (i.e. success review)
  - Go Live - send login emails and post- roll out debrief (i.e. success review)
- 

## Continuous Support

---

- Create and distribute training content as features are added
  - Host quarterly customer reviews and check-ins
  - Launch continuous customer communications to announce new features and capabilities
-