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Customer Onboarding Checklist

Free Customer Onboarding Checklist with AI customization. Industry-specific guidance for customer onboarding checklist. Build your checklist now.

Welcome & Introduction

- ☐ Send personalized welcome email
- ☐ Provide getting started guide
- ☐ Schedule welcome call
- ☐ Introduce account team
- ☐ Share contact information
- ☐ Set expectations
- ☐ Explain support channels
- ☐ Provide resource links
- ☐ Send login credentials
- ☐ Confirm receipt
- ☐ Address initial questions
- ☐ Create positive first impression

Account Setup

- ☐ Create customer account
- ☐ Configure user profiles
- ☐ Set up permissions
- ☐ Customize settings
- ☐ Import customer data
- ☐ Configure integrations
- ☐ Set up billing
- ☐ Enable features
- ☐ Customize branding
- ☐ Configure notifications
- ☐ Test functionality
- ☐ Verify setup complete

Product Training

- ☐ Schedule training sessions
- ☐ Provide training materials
- ☐ Conduct product walkthrough
- ☐ Demonstrate key features
- ☐ Practice common tasks
- ☐ Answer questions
- ☐ Provide documentation
- ☐ Share video tutorials

- ☐ Create quick reference guides
- ☐ Set up practice environment
- ☐ Assess understanding
- ☐ Schedule follow-up training

Implementation Planning

- ☐ Define success criteria
- ☐ Set implementation timeline
- ☐ Identify key milestones
- ☐ Assign responsibilities
- ☐ Plan data migration
- ☐ Schedule go-live date
- ☐ Create project plan
- ☐ Identify risks
- ☐ Plan contingencies
- ☐ Set review points
- ☐ Document requirements
- ☐ Align expectations

Configuration & Customization

- ☐ Gather requirements
- ☐ Configure system settings
- ☐ Customize workflows
- ☐ Set up automations
- ☐ Create custom fields
- ☐ Design templates
- ☐ Configure reports
- ☐ Set up dashboards
- ☐ Integrate systems
- ☐ Test configurations
- ☐ Document setup
- ☐ Train on customizations

Data Migration

- ☐ Assess data requirements
- ☐ Plan migration strategy
- ☐ Prepare data for import
- ☐ Clean and validate data
- ☐ Map data fields
- ☐ Test migration process
- ☐ Execute migration
- ☐ Verify data integrity
- ☐ Address issues
- ☐ Document process
- ☐ Confirm completion

- ☐ Archive old system

User Adoption

- ☐ Identify key users
- ☐ Create adoption plan
- ☐ Provide user training
- ☐ Share best practices
- ☐ Create user guides
- ☐ Set up support system
- ☐ Monitor usage
- ☐ Address resistance
- ☐ Celebrate early wins
- ☐ Gather feedback
- ☐ Optimize experience
- ☐ Drive engagement

Success Planning

- ☐ Define success metrics
- ☐ Set performance goals
- ☐ Create measurement plan
- ☐ Schedule business reviews
- ☐ Plan optimization sessions
- ☐ Set growth targets
- ☐ Identify expansion opportunities
- ☐ Plan feature adoption
- ☐ Schedule health checks
- ☐ Create success roadmap
- ☐ Align on objectives
- ☐ Document success plan

Support Setup

- ☐ Explain support tiers
- ☐ Provide support contacts
- ☐ Set up ticketing access
- ☐ Share response SLAs
- ☐ Provide knowledge base
- ☐ Schedule office hours
- ☐ Create escalation path
- ☐ Share troubleshooting guides
- ☐ Set up monitoring
- ☐ Enable notifications
- ☐ Test support channels
- ☐ Confirm understanding

First Value Milestone

- ☐ Identify quick wins
- ☐ Guide first success
- ☐ Measure initial results
- ☐ Share achievements
- ☐ Gather feedback
- ☐ Address challenges
- ☐ Optimize setup
- ☐ Plan next steps
- ☐ Celebrate success
- ☐ Build momentum
- ☐ Expand usage
- ☐ Document learnings

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