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New Customer Onboarding Checklist

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

Customer Welcome

- ☐ Send personalized welcome message
- ☐ Thank for choosing us
- ☐ Introduce account team
- ☐ Share getting started guide
- ☐ Provide contact information
- ☐ Set initial expectations
- ☐ Schedule welcome call
- ☐ Send welcome package
- ☐ Provide login credentials
- ☐ Share resource links
- ☐ Join customer community
- ☐ Celebrate new partnership

Account Creation

- ☐ Set up customer account
- ☐ Create user profiles
- ☐ Configure permissions
- ☐ Customize preferences
- ☐ Set notification settings
- ☐ Configure security
- ☐ Enable features
- ☐ Set up billing
- ☐ Add payment method
- ☐ Configure invoicing
- ☐ Set credit terms
- ☐ Document special requirements

Needs Assessment

- ☐ Understand business goals
- ☐ Identify success metrics
- ☐ Document requirements
- ☐ Assess current state
- ☐ Define desired outcomes
- ☐ Understand constraints
- ☐ Identify stakeholders
- ☐ Map decision process

- ☐ Review timeline
- ☐ Set priorities
- ☐ Document challenges
- ☐ Plan solutions

Product Setup

- ☐ Configure product/service
- ☐ Customize settings
- ☐ Import data
- ☐ Set up integrations
- ☐ Configure workflows
- ☐ Create templates
- ☐ Set up automation
- ☐ Enable features
- ☐ Test functionality
- ☐ Validate setup
- ☐ Document configuration
- ☐ Provide access

Training Delivery

- ☐ Schedule training sessions
- ☐ Provide materials
- ☐ Conduct product demo
- ☐ Hands-on practice
- ☐ Q&A sessions
- ☐ Record training
- ☐ Create documentation
- ☐ Share best practices
- ☐ Provide examples
- ☐ Test knowledge
- ☐ Offer certification
- ☐ Schedule follow-up

Implementation Support

- ☐ Assign implementation manager
- ☐ Create project plan
- ☐ Set milestones
- ☐ Weekly check-ins
- ☐ Address issues
- ☐ Provide guidance
- ☐ Monitor progress
- ☐ Adjust approach
- ☐ Escalate blockers
- ☐ Celebrate wins
- ☐ Document learnings

- ☐ Ensure success

Integration Assistance

- ☐ Review integration needs
- ☐ Provide API documentation
- ☐ Technical support
- ☐ Test connections
- ☐ Validate data flow
- ☐ Troubleshoot issues
- ☐ Optimize performance
- ☐ Document setup
- ☐ Monitor stability
- ☐ Provide maintenance
- ☐ Plan updates
- ☐ Ensure compatibility

Success Planning

- ☐ Define success criteria
- ☐ Set measurable goals
- ☐ Create success plan
- ☐ Schedule reviews
- ☐ Track metrics
- ☐ Monitor usage
- ☐ Identify opportunities
- ☐ Plan optimization
- ☐ Support growth
- ☐ Measure ROI
- ☐ Report progress
- ☐ Adjust strategies

Ongoing Support

- ☐ Explain support channels
- ☐ Share response times
- ☐ Provide documentation
- ☐ Set up help center access
- ☐ Schedule office hours
- ☐ Create support tickets
- ☐ Monitor satisfaction
- ☐ Proactive outreach
- ☐ Health checks
- ☐ Optimization sessions
- ☐ Feature updates
- ☐ Renewal planning

Feedback Loop

- ☐ Initial feedback survey
- ☐ Usage analytics review
- ☐ Satisfaction assessment
- ☐ Feature requests
- ☐ Improvement suggestions
- ☐ Success stories
- ☐ Case study opportunity
- ☐ Reference potential
- ☐ Testimonial request
- ☐ Review site encouragement
- ☐ Referral program
- ☐ Advisory board invitation

Relationship Building

- ☐ Regular check-ins
- ☐ Business reviews
- ☐ Executive alignment
- ☐ Team building
- ☐ User community
- ☐ Events and webinars
- ☐ Newsletter subscription
- ☐ Social media connection
- ☐ Partner opportunities
- ☐ Loyalty programs
- ☐ Anniversary recognition
- ☐ Long-term partnership

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