Saas Onboarding Checklist

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

Account Activation

- [ ] Verify email address
- [ ] Create secure password
- [ ] Set up 2FA/MFA
- [ ] Complete profile information
- [ ] Choose subscription plan
- [ ] Enter payment information
- [ ] Apply promo codes
- [ ] Confirm billing details
- [ ] Accept terms of service
- [ ] Set communication preferences
- [ ] Configure timezone
- [ ] Activate account

Initial Setup Wizard

- [ ] Welcome screen tour
- [ ] Goal identification
- [ ] Use case selection
- [ ] Feature preferences
- [ ] Integration needs assessment
- [ ] Data import options
- [ ] Team size configuration
- [ ] Industry selection
- [ ] Customization preferences
- [ ] Success metrics definition
- [ ] Quick win identification
- [ ] Setup completion confirmation

User Management

- [ ] Add team members
- [ ] Set user roles
- [ ] Configure permissions
- [ ] Create user groups
- [ ] Set access levels
- [ ] Configure SSO if available
- [ ] Set password policies
- [ ] Enable audit logs

- [ ] Configure security settings
- [ ] Set session timeouts
- [ ] Enable activity tracking
- [ ] Document admin users

Data Migration

- [ ] Assess data requirements
- [ ] Prepare import templates
- [ ] Clean existing data
- [ ] Map data fields
- [ ] Test import process
- [ ] Execute data import
- [ ] Verify data integrity
- [ ] Set up data sync
- [ ] Configure backups
- [ ] Enable version control
- [ ] Document data structure
- [ ] Archive legacy data

Integration Configuration

- [ ] Identify integration needs
- [ ] Connect CRM system
- [ ] Set up email integration
- [ ] Configure calendar sync
- [ ] Connect payment systems
- [ ] Set up analytics tools
- [ ] Enable API access
- [ ] Configure webhooks
- [ ] Test data flow
- [ ] Document integrations
- [ ] Set up error handling
- [ ] Monitor integration health

Feature Configuration

- [ ] Enable required features
- [ ] Disable unnecessary features
- [ ] Configure workflows
- [ ] Set up automation rules
- [ ] Create templates
- [ ] Configure notifications
- [ ] Set up reporting
- [ ] Customize dashboards
- [ ] Configure alerts
- [ ] Set up scheduled tasks
- [ ] Enable advanced features

- [ ] Test configurations

Training & Education

- [ ] Complete product tour
- [ ] Watch getting started videos
- [ ] Attend live training session
- [ ] Review documentation
- [ ] Complete interactive tutorials
- [ ] Practice in sandbox
- [ ] Learn keyboard shortcuts
- [ ] Understand best practices
- [ ] Join user community
- [ ] Subscribe to updates
- [ ] Book advanced training
- [ ] Get certified

Success Metrics Setup

- [ ] Define KPIs
- [ ] Set up tracking
- [ ] Configure dashboards
- [ ] Create reports
- [ ] Set benchmarks
- [ ] Enable analytics
- [ ] Configure goals
- [ ] Set up alerts
- [ ] Schedule reviews
- [ ] Document metrics
- [ ] Share with team
- [ ] Plan optimization

Team Enablement

- [ ] Train team members
- [ ] Share best practices
- [ ] Create internal documentation
- [ ] Set team guidelines
- [ ] Establish workflows
- [ ] Define responsibilities
- [ ] Create templates
- [ ] Set naming conventions
- [ ] Document processes
- [ ] Schedule team training
- [ ] Monitor adoption
- [ ] Gather feedback

Go-Live Preparation

- ☐ Complete all setup
- ☐ Test all features
- ☐ Verify integrations
- ☐ Train all users
- ☐ Document configuration
- ☐ Create backup plan
- ☐ Set support contacts
- ☐ Schedule check-ins
- ☐ Plan rollout
- ☐ Communicate launch
- ☐ Monitor initial usage
- ☐ Address issues quickly

Ongoing Success

- ☐ Schedule regular reviews
- ☐ Monitor usage metrics
- ☐ Identify power users
- ☐ Address adoption gaps
- ☐ Optimize configurations
- ☐ Explore new features
- ☐ Attend webinars
- ☐ Engage with community
- ☐ Provide feedback
- ☐ Plan scaling
- ☐ Consider upgrades
- ☐ Renew subscription

Support & Resources

- ☐ Save support contacts
- ☐ Bookmark help center
- ☐ Join community forum
- ☐ Follow social channels
- ☐ Subscribe to blog
- ☐ Download mobile app
- ☐ Set up status alerts
- ☐ Know escalation path
- ☐ Access training materials
- ☐ Use chat support
- ☐ Submit feature requests
- ☐ Report bugs properly