



The Customer Onboarding Checklist

EverAfter

Customer onboarding should feel simple, straightforward, and empowering to customers. To make this experience perfect, a few things should be taken into consideration.

The following is a suggested list of key items to consider when onboarding medium to high touch customers.

STEP 1

Hand-off from the sales team

- ☐ Review commercial assets (Plan, renewal date and terms, any commitments)
- ☐ Align on the timeline that was discussed with the customer
- ☐ Review stakeholders mapping and make sure all contacts are in the CRM
- ☐ Explore the primary use case
- ☐ Discuss additional use cases or pain points you might be able to help with
- ☐ Get clarity on customer goals
- ☐ Evaluate potential risks

STEP 2

Self-learning - get 360 overview

- ☐ Listen to sales call recording
- ☐ Review company website and business
- ☐ Explore the LinkedIn profile of the primary contacts

STEP 3

Preparation for a kickoff meeting

- ☐ Prepare a presentation with the relevant points to discuss, customized to the customer
- ☐ Build a timeline with major milestones
- ☐ Send a welcome email to the customer, introducing yourself
- ☐ If there are any items, the customer can prepare before the call, send them the request

STEP 4

During the kickoff meeting

- ☐ Introduction of both teams and roles
- ☐ Confirm customer goals
- ☐ Set expectations regarding the journey, timeline, and outcomes
- ☐ Discuss onboarding timeline and milestones
- ☐ Leave time for Q&A
- ☐ Set clear next steps and owners

STEP 5

Post kickoff meeting

- ☐ Record the meeting outcome in your system of records
- ☐ Send follow up email to the participants with the action items & the presentation
- ☐ Schedule recurring meetings until the go-live date

STEP 6

During the onboarding period

- ☐ Review action item progress
- ☐ Share the progress on an ongoing basis to keep the customer accountable
- ☐ Conduct weekly calls with the customer
- ☐ Assess risk and bottlenecks
- ☐ Offer additional training sessions or materials for relevant team members

STEP 7

Before go-live

- ☐ Review the settings and customization of the customer
- ☐ Consider preparing materials for your champion to send to the rest of their team

STEP 8

Post-go-live

- ☐ Review data to see everything is going smoothly
- ☐ Monitor usage and support tickets
- ☐ Celebrate the go-live with a cool gif or email
- ☐ Set and conduct a post-launch call

Onboarding is a critical phase in the customer journey.

Having an agile process in place makes sure your team is aligned, and you can focus on the customer.

Creating a delightful, professional customer onboarding experience will result in engaged customers that see the value of your offering, love working with you and your brand, require less support, and – are less likely to churn.

In our recently released, [Customer Onboarding Report](#), we've compiled key research findings from our industry survey, compiled onboarding best practices and predictions and included industry leaders insights and tips. If you are interested in learning more about how automation & personalization work together like magic, [access the report here](#) for free.

EverAfter is the best place to create those customer journey experiences. Create an onboarding plan that paves the way for your customers, centralizes everything your customer needs during this period, and makes them feel they are in good hands.

CREATE YOUR FIRST **CUSTOMER ONBOARDING HUB**

[Get Started >>](#)

Get started with our free plan, or get more with our premium software.

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