

CLIENT ONBOARDING (SAMPLE)

Company Name: (Required)

1 Gather Basic Information

Assignees:

Process Starter 

Deadline:

5 days after a process is launched

Please **enter basic details** for [Company Name:]'s onboarding process using the form fields below.

Primary Contact First Name: (Required)

Primary Contact Last Name: (Required)

Primary Contact E-Mail Address: (Required)

Primary Contact Phone Number: (Required)

Preferred Method of Communication:

Phone

E-Mail

2 Send Welcome E-Mail

Assignees:

Process Starter

Deadline:

2 days after Step 1: Gather Basic Information

Help your client feel welcome by **sending a personalized e-mail** with a curated selection of content.

Use the checklist below to send **[Primary Contact First Name:] [Primary Contact Last Name:]** of **[Company Name:]** an email at **[Primary Contact E-Mail Address:]**.

Include the following in the welcome E-Mail: (Required)

- An Introduction of Yourself
- An Introduction of Our Company
- Relevant Introduction Videos
- Some Customer Testimonials
- Link to the FAQs
- Request Dates & Times for Kick-Off Call

3

Conduct a Kick-Off Call

Assignees:

Process Starter

Deadline:

1 week after Step 2: Send Welcome E-Mail

During your kickoff call, you must **learn [Company Name:]'s required outcome**. You should also be able to **gather the primary use cases** of **[Company Name:]**.

Make sure to **schedule a date for the 1 month follow-up call** with **[Primary Contact First Name:] [Primary Contact Last Name:]** to ensure we are helping **[Company Name:]** achieve the milestones they listed in the kick-off call. **Confirm that the number listed, [Primary Contact Phone Number:],** is the right number to contact.

What are the required outcomes? (Required)

What are the primary use cases? (Required)

What are some successful milestones we should keep in mind? (Required)

Other notes:

Date of the 1 month follow-up call:

Phone Number For Follow-Up Call:

4 Conduct a 1 month check-in Call

Assignees:

Process Starter

Deadline:

1 month after Step 3: Conduct a Kick-Off Call

Determine whether the milestones have been met by analyzing the results of [Company Name:] with [Primary Contact First Name:] [Primary Contact Last Name:].

Make notes during your call using the form fields here.

Have the milestones been successfully met? (Required)

- Yes, we have blown away our expectations!
- Yes, we are on-track.
- No, we are just shy of expectations.
- No, we are way behind expectations.

Notes from the follow-up call: (Required)

5 Request Feedback

Assignees:

Process Starter 

Deadline:

1 week after Step 4: Conduct a 1 month check-in Call

Please provide any feedback you have about the use of our product by completing the form fields below. Your input is critical in helping us improve our user experience.

On a scale of 1 (poor) to 5 (excellent), how would you rate your user experience?

- 1 - poor
- 2 - below average
- 3 - average
- 4 - good
- 5 - excellent

Would you recommend our product to others?

- Yes
 No

Do you have any other feedback or feature requests you would like to see implemented in the future?

6 Request a Customer Testimonial

Assignees:

Process Starter

Deadline:

3 days after Step 4: Conduct a 1 month check-in Call

Now that the first success milestone has been reached, it's a prime opportunity for you to **request a testimonial from your customer**.

Send an e-mail to **[Primary Contact First Name:] [Primary Contact Last Name:]** at **[Primary Contact E-Mail Address:]** requesting a customer testimonial using the checklist below as a guide:

Include the following in the testimonial request email:

- Include the successes they achieved using our product
- A link to the existing customer testimonial page
- Mention that it takes 5 minutes to submit a testimonial
- Conclude with a statement of thanks