**[A blue and white sign

AI-generated content may be incorrect.](https://www.smartsheet.com/try-it?trp=8779&utm_source=template-word&utm_medium=content&utm_campaign=Customer+Onboarding+Checklist-word-8779&lpa=Customer+Onboarding+Checklist+word+8779)Customer Onboarding Checklist Template**

|  |  |
| --- | --- |
| **Customer Name** | Name |
| **Company Name (if applicable)** |  |
| **Industry** |  |
| **Primary Contact** |  |
| **Contact Email and Phone** |  |
| **Account Manager** |  |
| **Onboarding Start Date** | MM/DD/YY |

|  |  |  |
| --- | --- | --- |
| Welcome and Account Setup | |  |
| **Task** | **Owner** | **Status** |
|  |  | **Complete** |
|  |  | **Not Started** |
|  |  | **In Progress** |
|  |  | **Complete** |
|  |  | **Complete** |

|  |  |  |
| --- | --- | --- |
| Understanding Customer Needs | |  |
| **Task** | **Owner** | **Status** |
|  |  | **Complete** |
|  |  | **Not Started** |
|  |  | **In Progress** |
|  |  | **Complete** |
|  |  | **Complete** |

|  |  |  |
| --- | --- | --- |
| Training and Product Education | |  |
| **Task** | **Owner** | **Status** |
|  |  | **Complete** |
|  |  | **Not Started** |
|  |  | **In Progress** |
|  |  | **Complete** |
|  |  | **Complete** |

|  |  |  |
| --- | --- | --- |
| First Check-Ins and Support | |  |
| **Task** | **Owner** | **Status** |
|  |  | **Complete** |
|  |  | **Not Started** |
|  |  | **In Progress** |
|  |  | **Complete** |
|  |  | **Complete** |

|  |  |  |
| --- | --- | --- |
| Follow-Up and Optimization | |  |
| **Task** | **Owner** | **Status** |
|  |  | **Complete** |
|  |  | **Not Started** |
|  |  | **In Progress** |
|  |  | **Complete** |
|  |  | **Complete** |

|  |  |  |
| --- | --- | --- |
| Ongoing Engagement and Retention | |  |
| **Task** | **Owner** | **Status** |
|  |  | **Complete** |
|  |  | **Not Started** |
|  |  | **In Progress** |
|  |  | **Complete** |
|  |  | **Complete** |

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