**Customer Onboarding Checklist Template**

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

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| --- | --- |
| 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** |

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| --- | --- |
| 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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