Customer onboarding checklist

Turn a new sale into a happy, long-term customer. Work through each stage and tick items off as you go.

Customer _____

Start date _____

Account owner _____

Agreed outcome _____

1. Before kick-off (sale to day 0)

- [ ] Signed agreement, quote or order received and filed — Sales
- [ ] Handover from sales: what was promised, why they bought, key contacts — Sales
- [ ] Customer set up in CRM and accounting software with correct ABN and billing details — Admin
- [ ] First invoice or payment terms confirmed (tax invoice shows GST where it applies) — Admin
- [ ] Internal owner assigned and kick-off date booked — Account owner

2. Welcome (day 0 to 2)

- [ ] Personal welcome email or call from the account owner — Account owner
- [ ] Clear "what happens next" timeline sent — Account owner
- [ ] Contact list shared: who to call for what, and response times — Account owner
- [ ] Logins, portal access or welcome pack delivered — Delivery

3. Kick-off and set-up (week 1)

- [ ] Kick-off meeting held: goals, success measures, timeline, responsibilities — Account owner
- [ ] Success measures written down and agreed with the customer — Account owner
- [ ] Information, data or access needed from the customer requested with a deadline — Delivery
- [ ] Set-up, installation or configuration completed and tested — Delivery
- [ ] Training or a short guide provided for the customer’s team — Delivery

4. First value (weeks 2 to 4)

- [ ] First result delivered and shown to the customer — Delivery
- [ ] Check-in call: is it working as expected? Any problems? — Account owner
- [ ] Issues logged and resolved, with the customer kept informed — Delivery

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5. 30-day review

☐	Progress reviewed against the agreed success measures	Account owner
☐	Satisfaction asked for (a quick 1 to 5 score or NPS question) and recorded	Account owner
☐	Onboarding marked complete in CRM; handover to ongoing service if different	Account owner

6. 90-day review and growth

☐	Results summary shared with the customer	Account owner
☐	Review or testimonial requested if the customer is happy	Account owner
☐	Next opportunities discussed: renewal, extra services, referrals	Account owner
☐	Lessons fed back to improve this checklist	Owner

Notes

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