

Customer Onboarding Checklist

What a new customer's first experience with you should include, so they feel confident, not confused.

Immediately After Purchase / Signup

- ☐ Confirmation sent right away, clearly stating what happens next
- ☐ Timeline set: when will they hear from you, and about what
- ☐ Point of contact introduced by name, not just "our team"

First Week

- ☐ Welcome communication that goes beyond a receipt; sets expectations
- ☐ Any account setup, access, or paperwork clearly explained
- ☐ First real touchpoint (call, meeting, or check-in) scheduled

First 30 Days

- ☐ Check-in to confirm things are going well, before problems become complaints
- ☐ Any early questions proactively addressed, not just waited on
- ☐ Clear path shown for what "success" looks like with you

Watch For

- ☐ The gap between "they said yes" and "they actually feel like a customer"
- ☐ Assuming they understand your process just because you do
- ☐ Silence; a customer who hears nothing starts to wonder if they made a mistake

Simple Tracking

CUSTOMER	SIGNUP DATE	WELCOME SENT?	FIRST CHECK-IN DONE?	NOTES