

Customer Onboarding Checklist

A checklist for guiding new product or SaaS customers from account setup to activation and first value.

Account Setup

- Confirm the signup and verify the customer's email address.
- Provision the account with the correct plan, limits and permissions.
- Guide the user through profile and workspace basics on first login.
- Help connect essential integrations or import existing data.
Imported data makes the product feel useful immediately.
- Confirm login works across the devices the customer will actually use.

Welcome and Orientation

- Send a warm welcome message that sets expectations for the journey.
- Share a short getting-started guide or quick-start video.
- Point the user to support channels, help center and community.
- Set a clear first goal so the user knows what success looks like.
- Offer a personalized walkthrough or onboarding call for higher-tier plans.

Activation and First Value

- Guide the user to complete the core action that delivers value.
- Remove friction from the activation flow with inline tips or tooltips.
- Celebrate the first value moment so the user notices the benefit.
Name the win in-product — 'You just shipped your first report.'
- Suggest a logical next step that deepens product usage.
- Track activation milestones so you know who has and hasn't reached value.

Training and Enablement

- Share role-relevant tutorials rather than the entire feature list.
- Deliver tips progressively as the user is ready for each feature.
- Invite the user to a live webinar or office hours if available.
- Provide templates or examples that speed up real work.
- Confirm the user can complete their key tasks without help.

Engagement and Habit Building

- Set up helpful notifications or reminders without overwhelming the user.
- Encourage the user to invite teammates or expand usage where relevant.
- Highlight an underused feature that matches the customer's goal.
- Monitor usage signals to spot drop-off before it becomes churn.
A sudden activity drop is an early churn warning.
- Re-engage inactive users with a targeted, value-focused message.

Check-In and Retention

- Run an early check-in to confirm the customer is getting value.
- Collect feedback with a short survey or quick onboarding rating.
- Resolve any blockers surfaced during the check-in promptly.
- Share a clear path to upgrade or expand once value is proven.

○ Hand off long-term accounts to ongoing success with full context.

Document goals and milestones so success picks up seamlessly.