

# Client Onboarding Checklist

## 1. Prepare

- Learn about your customer segments.
- Study the use cases of your product for each persona.

## 2. Welcome

- Send a personalized welcome email to the user
- Provide clear contact information for customer support
- Present the main features of the product or service
- Announce and explain the next step in the process.

## 3. Ask

- Find out about your customer using a questionnaire.
- Collect and analyze data.

## 4. Train

- Create a logical sequence of steps to introduce functionality
- Provide examples and use cases of similar users.
- Provide a tips and tricks sheet to help the customer discover best practices.
- Provide links to all resources that could be useful to your user (video tutorials, blog articles...)

## 5. Analyze

- Ask the customer for feedback on your onboarding and measure the response rate
- Send satisfaction surveys by email after the onboarding is over
- Use customer feedback on the tool
- Regularly evaluate whether the onboarding process is still relevant

## 6. Follow up

- Allow the customer to ask questions to a customer support team
- Check in with the customer to make sure everything is going well
- Request regular feedback and comments
- Provide regular updates on new features and improvements