

Customer Onboarding Preparedness Plan



In order to get the most out of the crucial first few client interactions, you'll need to understand some basic information:

Company Information

- Company Name
- Company Locations
- What does the company do?
- Type of Company / Industry
- Type of Customers (i.e. B2B or B2C)
- What products, packages, service level did they buy?
- Why did they buy your product? What are they most excited about?
- What is the use case they're solving for?
- When do they want to be live?
- What complementary technology do they use?
- What competitive technology do they use?
- Are they coming from a competitive solution?

Contact Information

- Primary Point of Contact Name
- What is their role?
- How long have they been with the company?
- Are there any other contacts that will be assisting in onboarding?
- What are their roles?
- How long have they been with the company?
- Quick LinkedIn search to see their background.

