



Your 6 Step Checklist to Achieve More Successful Client Onboarding & Experience Less Churn

Does Your Process Cover All These Areas?

1 Start Tracking These 3 Key Metrics

- A. **The Backlog:** the time between signing the deal and starting onboarding
- B. **The Timespan:** the time between the start and completion of onboarding
- C. **% Completion:** the % of clients who complete the onboarding process, vs the total # of total number of onboarding projects

3 Maintain a Consistent Communications Protocol Throughout the Project

- Ensure the client actively engaged
- Follow regular touchpoints
- Maintain a clear channel of communications and transparency
- Empower the client to engage when it is convenient for them.
- Start collaborating on the rollout plan

5 Client Rollout and Debrief

- Transition the project is to client success or support organization
- Review the project against the team metrics and discuss improvements
- Ensure the client is using the new solution and realizing it value

2 Align at the Start of the Project

- Identify the stakeholders on both sides
- Confirm the project scope and timeline
- Verify all the necessary data has been collected from the client
- Align on the working dynamics such as weekly status connect
- Review documented onboarding roadmap, milestones, and processes
- Agree on the definition of success

4 Conduct a Formal Project Wrap-up

- Complete a final onboarding review with the client
- Make any final modifications as needed
- Initiate a formal written sign-off
- Go over the definitions of success with the client to ensure "closure"
- Collect internal and external feedback

6 Prioritize Onboarding as an Operational Activity!

- Standardize onboarding process with company-wide checklists, metrics, templates, and automation
- Drive a sense of ownership by keeping the team is accountable
- Leverage specialized client onboarding software to make onboarding scalable, reportable, and awesome



A successful transition from a brand-new client into a brand advocate is crucial to your mission. Setuply's comprehensive client onboarding solutions optimize onboarding profitability, accelerate time to value, and drive long-term success.

For all your client onboarding needs, don't hesitate to contact us. We're here to help.

Setuply.com: Onboard Faster, Live Better!

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