

Customer Onboarding Launch Kit



We've compiled a list of ready-to-use Customer Onboarding assets to ensure you have a rock-solid foundation to wow your customers the moment they begin onboarding.

- [Customer Handoff Email: Sales > Success](#)**
We like to minimize handoffs between departments. A good way to do this is by handing off the customer from Sales directly to the CSM, then communicating that the Onboarding Specialist is there to help them get up and running quickly.
- [Customer Handoff Response Email from Success](#)**
Welcome the client, reassure them that they are in good hands, and make it as easy as possible for the customer to initiate the next steps with you.
- [Preparedness Plan](#)**
Knowing your customer, their industry, their use case, and ultimately their goals are crucial to success, check out the preparedness plan for a starting point.
- [Visual Onboarding Experience](#)**
Use a visual early and often to show the customer where they have been, where they are now, and where they are going.
- [Kickoff Call Script](#)**
Again, the goal of this call is to make the customer feel welcomed, understand their use case, and minimize any negative feelings of being handed off.
- [Post-Kickoff & Post-Launch Survey](#)**
These simple surveys can help determine if Sales has set the right expectations and if there are any misalignments. Ultimately, it will identify problems earlier in the customer lifecycle.
- [Customer Support Introduction Email: CS > Support](#)**
Similar to the Sales > Success handoff, you want to make this handoff as seamless and as clear as possible.

Make sure to check out [The Definitive Guide to Customer Onboarding](#) for more helpful resources.

