

Customer Onboarding Guide Template

Use this guide to coordinate a customer's path from welcome and setup to first value and ongoing support. Keep customer and provider responsibilities visible and connect each phase to evidence that the customer is ready to move forward.

Complete the bracketed fields with approved information for the product, organization, or program being documented. Repeat the named forms where several tasks or subjects need separate records. Remove sections that do not apply and retain links to the material used to complete the document.

Document control	Entry
Document identifier	[Identifier used by your team]
Scope and applicable version	[Product, program, locations, and version covered]
Prepared and maintained by	[Responsible role or team]
Revision and review	[Revision, review date, and approval reference]

Welcome and Onboarding Plan

Identify the product and customer scope, then describe the journey and the people involved. Use the customer's goals to give setup and training a clear purpose.

Field	Complete with
Customer and product	[Customer team, product or edition, scope, and applicable environment]
Journey	[Phase names, intended outcomes, dependencies, and exit conditions]
Responsibilities	[Customer and provider roles, decisions, approvals, and handoff points]
Communication	[Project workspace, contact roles, meeting or update plan, and issue route]

Kickoff and Success Plan

Prepare the kickoff around a shared outcome and a verifiable definition of first value. Distinguish a business objective from the product activity intended to support it.

Field	Complete with
Kickoff preparation	[Participants, source material, agenda, decisions needed, and unresolved questions]
Business objectives	[Customer problem, desired outcome, baseline if available, and evidence source]
Milestones	[Milestone, activities, dependencies, responsible roles, and completion evidence]
Success review	[Measure, target if agreed, data source, review point, and acceptance reference]

Milestone Plan

Milestone	Customer action	Provider action	Completion evidence
[Milestone]	[Action and role]	[Action and role]	[Observable result]

Account and Access Setup

Separate administrator setup from everyday user activation. Use a task record for each distinct role or product variant when the steps differ.

Field	Complete with
Task and audience	[Activation, sign-in, user, role, or permission task and intended role]
Prerequisites	[Account, authorization, identity service, access request, and environment]
Setup actions	[Ordered actions, exact labels, decisions, and approved credential handling reference]
Verification	[Expected access, successful first task, denied-access check if required, and support route]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Configuration Data and Integrations

Document the configuration work needed for the customer's agreed use case. Keep the selected settings and data mapping traceable to their source and verification.

Field	Complete with
Configuration baseline	[Setting, purpose, selected value or secret reference, and environment]
Data preparation	[Source, format, quality checks, mapping, and import or migration scope]
Integration	[Connected system, workflow, authentication reference, dependencies, and ownership]
Verification and recovery	[Test input, expected result, reconciliation evidence, and recovery reference]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Training and Enablement

Build learning paths around the tasks each role needs to perform. Keep a skill lesson, its practice activity, and evidence of readiness together.

Field	Complete with
Role path	[Role, intended product tasks, prerequisites, and lesson sequence]
Lesson	[Skill, explanation, demonstration, source materials, and facilitator or resource]
Practice	[Task, test data, expected result, and feedback method]
Readiness	[Observed performance, completion criterion, support need, and next learning activity]

Go Live and Adoption

Record readiness before switching to everyday use, then review adoption against the customer's success plan. Keep open issues and exceptions visible in the go-live decision.

Field	Complete with
Go-live readiness	[Access, configuration, data, training, support, and monitoring checks]
Launch	[Actions, dependencies, responsible roles, communications, and recovery conditions]
First value	[Customer outcome, observed result, acceptance evidence, and unresolved issue]
Adoption review	[Milestone, usage or outcome measure, source, review point, and next action]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Support and Ongoing Success

Complete the transition from project delivery to ongoing ownership. Give the customer a clear route for support and a record of remaining commitments.

Field	Complete with
Support channels	[Question or issue type, channel, severity reference, and escalation path]
Ongoing ownership	[Customer and provider roles, responsibilities, and engagement plan]
Transition record	[Configuration baseline, documents, training records, open actions, and acceptance]
Common questions	[Recurring question, source-supported answer, and task or reference link]