

# Customer Onboarding Playbook

Templates and workflows to streamline handoffs, kickoffs, and value delivery

by  Flowla

The first few weeks after a deal closes are make-or-break. This kit is your go-to resource for getting onboarding right – from the handoff to first value delivery.

## 1 Sales to CS handoff

### Internal handoff

Make sure to collect and share the necessary information about the customer and the project internally.

#### 01 Account details

- ☐ Company size
- ☐ Company industry
- ☐ Pricing plan
- ☐ Number of seats

#### 03 Product details

- ☐ Use case(s)
- ☐ Priority features
- ☐ Current toolset
- ☐ Competitive evaluation

#### 02 Customer details

- ☐ Name & contact info
- ☐ Department
- ☐ Role & responsibilities
- ☐ Other stakeholders  
(organizational structure)

#### 04 Project details


- ☐ Business goals & KPIs
- ☐ Customer expectations  
(timeline, training, etc.)
- ☐ Special contract terms
- ☐ Additional technical requests  
(integrations, etc.)

### External handoff

Complete the handoff with the customer.

- ☐ Introduce the CSM to the customer
- ☐ Hold a formal handoff meeting (optional)
- ☐ Reiterate the project goals and expectations with the customer
- ☐ Outline the project timeline and a mutual action plan
- ☐ Share any useful resources
- ☐ Organize the workshop/kickoff meeting

# Handoff email template

New Message

To

Your new customer

Subject

Next Steps: Getting Started with Flowla

Hi [First name],

Thank you for the nice chat today. [Meeting summary of any information you would like to reiterate.]









I'd like to introduce you to [Name], our Customer Success Manager. As agreed, she'll help you get started with [Product] and show you how to get the most out of it considering your use case.

Let's set up a workshop meeting as a next step.

Best,

[Sign off]

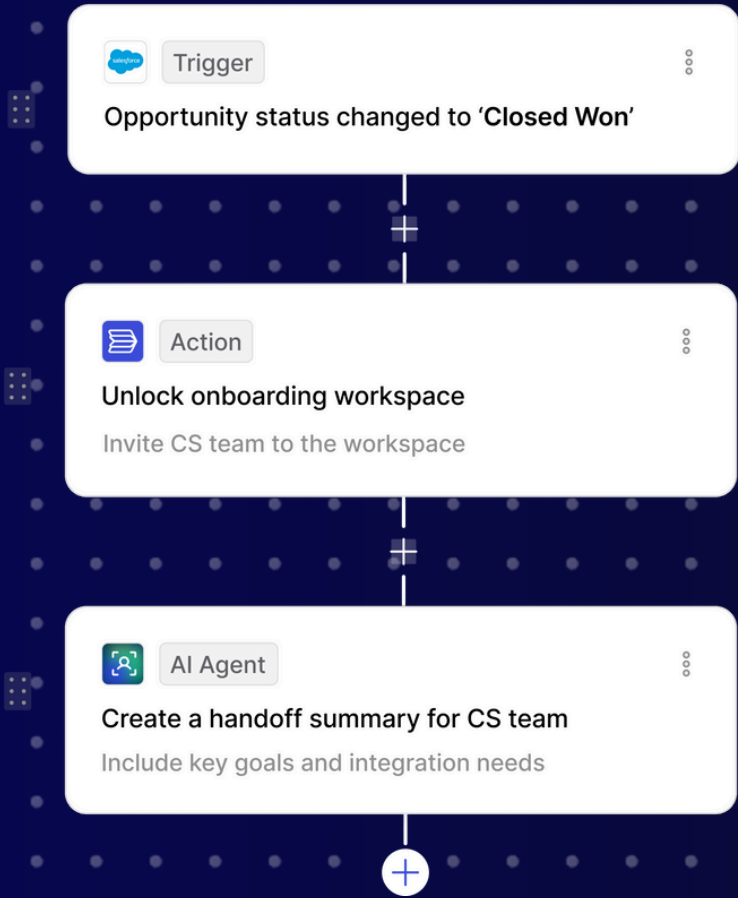
SEND





Automate your customer onboarding,  
from handoff to first value delivery.

See Flowla in action



2

Project kickoff

The kickoff meeting agenda template

1. Introduction by AE

The AE introduces the post-sales team to the customer, providing a brief background on each member's role.

2. CSM presentation

The CSM outlines the high-level onboarding process, ensuring everyone understands the overall journey.

4. Reasons for buying

Discuss the business challenges that led to the purchase and the success criteria. This ensures everyone is aligned on what needs to be achieved.

3. Team introductions and roles

Each team member briefly introduces themselves and explains their role in the onboarding process.

5. Tech stack review

Review the customer's existing technology stack to identify any potential integration challenges or opportunities.

6. Expectation setting

Clearly outline what the customer can expect from your team and what you need from them.

8. Scheduling weekly syncs and retrospectives

Establish a regular cadence for check-ins and retrospectives to ensure continuous alignment and progress.

7. Onboarding timelines

Provide a detailed timeline of the onboarding process, including key milestones.

9. Additional resources

Share any additional resources such as support documentation, blogs, user guides, and status pages that the customer might find useful.

10. Next steps

Outline the immediate next steps, ensuring that everyone knows what to expect in the first sync call.



3

Customer onboarding

6 elements of successful customer onboarding

- 01

**Timely welcome**  
Reach out immediately after receiving client contact info to schedule the kickoff meeting to review the onboarding roadmap for a smooth partnership, build trust, and explain the onboarding timeline.
- 02

**Needs assessment**  
Hold a dedicated session or send an onboarding questionnaire to understand the unique challenges, goals, and desired outcomes for maximum value from your product.
- 03


**Setup**  
Assist with account creation, configuration, and access to necessary tools to ensure the client is technically prepared to begin using your product independently before moving to deeper engagement.
- 04


**Education**  
Provide training sessions, guides, and resources to teach clients how to use your product efficiently to make them more successful and loyal. Ensure materials are accessible and organized for future reference.
- 05


**Establish communication channels**  
Determine the client’s preferred communication method (e.g., email, Slack). Make it easy for clients to reach out when needed and ensure they know who their main point of contact is.
- 06


**Ongoing support**  
Schedule regular check-ins to ensure clients are progressing and answer any questions. Continue to provide support and troubleshoot as needed until clients are comfortable using the product.


Best practices for effective customer onboarding

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**Plan ahead**  
Prepare the onboarding plan in advance, complete with steps, timelines, and resources. Ensure everything is in place to avoid delays once the onboarding process begins.
- 

**Personalize the experience**  
Tailor the onboarding to the client’s specific goals and challenges to enhance the client’s experience by showing that their unique needs are understood and addressed.
- 

**Clear communication**  
Share a clear roadmap, timelines, and what clients can expect at every stage to build trust and transparency by ensuring clients are informed at every step.
- 

**Stay organized**  
Keep all onboarding materials, steps, and contacts in a centralized space for easy access. Eliminate confusion and friction, making the process smoother for the client.
- 

**Gather feedback**  
Regularly solicit client feedback on the onboarding process. Continuously improve the process based on client insights.

# Sample client onboarding workflow

The onboarding workflow includes introduction, assessment, training, check-ins, and final evaluation.



## Day 1: Initial introduction

- [Welcome email](#): Introduce key team members, outline the onboarding process, and schedule a kickoff meeting.

## Week 1: Needs assessment & setup

- [Discovery session](#): Finalize client goals, needs, and pain points.
- [Technical setup](#): Help the client configure their account and handle any remaining formalities.

## Week 2: Training & customization

- [Training session](#): Walk the client through the product and provide all relevant resources.
- [Customization](#): Adjust settings based on the client’s feedback and goals.

## Ongoing: Checkpoints & progress reviews

- [Regular check-ins](#): Review the client’s progress, address challenges, and gather feedback.
- [Celebrate milestones](#): Acknowledge key achievements during the onboarding process.

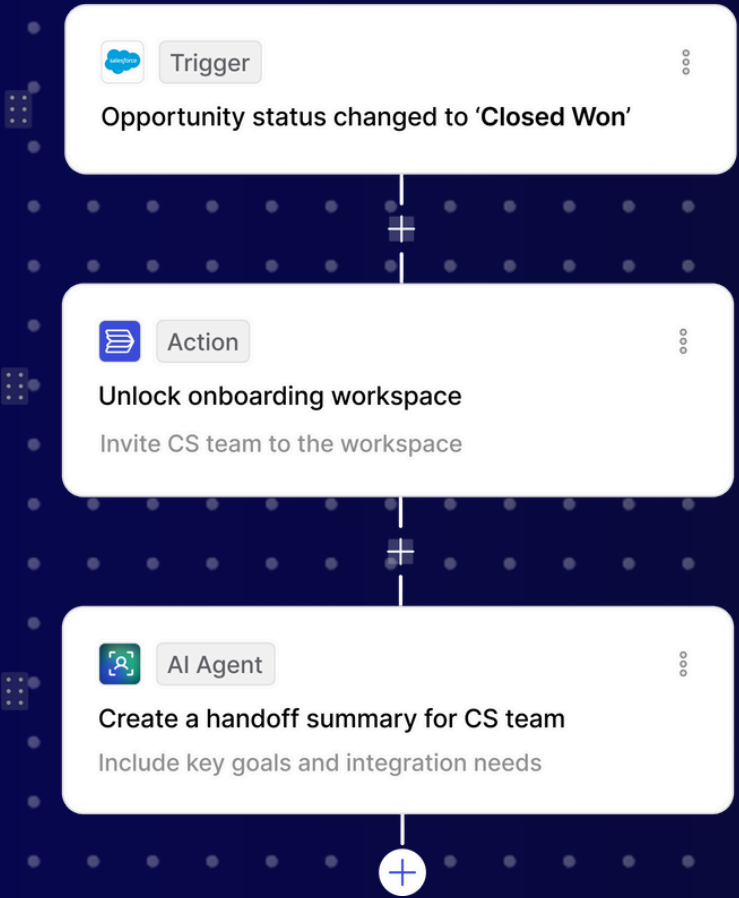
## Weeks 4-6: Post-onboarding evaluation

- [Survey/Review](#): Collect feedback about the onboarding experience and identify areas for improvement.



Automate your customer onboarding,  
from **handoff to first value**

See Flowla in action



4

First value delivery

Common mistakes in customer onboarding



	ISSUE	SOLUTION
Letting customer dictate the scope	Misaligned expectations and outcomes	Balance customer input with strategic guidance
Task completion over value delivery	Focusing on tasks rather than actual benefits.	Aim to deliver tangible benefits that meet customer goals.
Ignoring the first value milestone	Delayed success and satisfaction.	Ensure customers quickly realize the benefits of your product/service.
Choosing overly complex scopes	Hindered adoption and momentum	Select achievable goals providing immediate value.
Neglecting broader value delivery	Impacts overall success and satisfaction.	Focus on continuous value aligned with long-term goals.

Effective onboarding frameworks for value enhancement

- 01

Strategic outcome alignment framework

**Goal:** Align business objectives with customer value KPIs.

**Action:** Set clear expectations, link objectives to KPIs, and track progress.
- 02

Quick wins identification framework

**Goal:** Achieve small, early successes.

**Action:** Identify and deliver quick wins to build momentum and confidence.
- 03

Customer-centric adoption framewok

**Goal:** Simplify onboarding and enhance user adoption.

**Action:** Select goals that are easily understandable and provide immediate benefits.
- 04

Communication and feedback framework

**Goal:** Maintain proactive communication and feedback loops.

**Action:** Engage continuously, tailor onboarding to customer needs, and adjust strategies in real-time.