The Kickoff Meeting Agenda
by Nir Kalish

Flowla

The kickoff is the most critical step of the onboarding, and for me, it's the critical step of the entire relationship with the customer.

It is the foundation stone of the relationships with a new customer, and it is crucial to make it the right way to reduce churn risk, frustration, and loss of momentum down the road.

Nir Kalish
Head of Customer Success @ Nimble

Why do you need a kickoff meeting?

- Setting expectations
- Building relationships
- Clarifying success criteria
- Ensuring engagement

Who should attend the kickoff meeting?

From your side:

- The AE
- The post-sales team:
  - CSM,
  - Onboarding manager,
  - Technical Account Manager,
  - Solutions Architect and account manager.

Note: The list covers the most common roles. It does not mean your company requires all of them.

From the customer's side:

- The champion(s) who will manage the day-to-day relationships.
- The executive buyer - this is a must. During the onboarding, we must ensure they are aligned with the reason for buying, set the right expectations, and build initial relationships with them.
- Any other department relevant to making the onboarding successful (IT, SecTeam, etc.).

The onboarding 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.

3. Team introductions and roles

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

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.

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.

7. Onboarding timelines

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

8. Scheduling weekly syncs and retrospectives

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

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.