

SaaS Onboarding Checklist

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Six phases, in order, from first conversation to handoff. Tick each item before you move on.

1 Discovery & Plan

- ☐ Confirm what the customer bought, their goals and their definition of success
- ☐ Collect the sales handoff: contacts, use case, contract scope and any promises made
- ☐ Identify stakeholders on both sides: sponsor, project lead, admins, end users
- ☐ Agree the timeline, key dates and how you will communicate
- ☐ Write a short project plan with owners for each phase

2 Kickoff & Design

- ☐ Run a kickoff call: introductions, goals, scope, timeline and roles
- ☐ Map the customer's current process and the workflows they need
- ☐ Agree configuration, integrations and data requirements
- ☐ Define what "first value" looks like for this customer
- ☐ Document the design and get the customer's agreement

3 Build test environment (with sample data)

- ☐ Set up a test environment that mirrors the agreed design
- ☐ Configure users, roles and permissions
- ☐ Connect integrations in test mode
- ☐ Load representative sample data
- ☐ Run an internal check before the customer sees it

4 Testing & Training, ending in sign-off

- ☐ Share test scenarios based on the customer's real workflows
- ☐ Have the customer test and log issues in one place
- ☐ Fix issues and retest
- ☐ Train admins and end users; share guides and recordings
- ☐ Get written sign-off on testing before moving to production

5**Build production environment (with production data)**

- ☐ Plan the data migration: what moves, from where and who checks it
- ☐ Build production using the signed-off configuration
- ☐ Load and validate production data with the customer
- ☐ Confirm integrations, access and permissions in production
- ☐ Agree the go-live date, cutover steps and a rollback plan

6**Go-live & handoff to customer success and support (about 2 weeks)**

- ☐ Go live and monitor closely in the first days
- ☐ Hold quick check-ins to catch issues and questions early
- ☐ Confirm the customer has reached first value
- ☐ Hand off to customer success and support with full context and notes
- ☐ Introduce the customer to their ongoing contacts and how to get help

Then: ongoing customer success & maintenance.

Stuck on one of these?

Send Alex your biggest customer success problem at alex@onboardingplaybookstudio.com. If she doesn't have a useful answer within 2 business days, she builds you a free onboarding playbook. Or book a free 10-minute call: calendly.com/onboardingplaybookstudio/onboarding-audit-call