# Customer Onboarding Checklist

**Purpose:** This checklist ensures that all essential steps are completed when onboarding a new customer. Proper onboarding helps deliver a seamless and professional customer experience and sets the foundation for a successful relationship.

## Customer Information

|  |  |  |  |
| --- | --- | --- | --- |
| **Customer Name** | **Email** | **Company** | **Onboarding Date** |
| {customerName} | {email} | {company} | {onboardingDate} |

## Assigned Team Members

|  |  |  |
| --- | --- | --- |
| **Role** | **Name** | **Email** |
| {#teamMembers}{role} | {name} | {email}{/teamMembers} |

## Checklist

{#checklist}

* **{item}:** {description}

{/checklist}

## Customer Requirements

{#customerRequirements}

* **{requirement}**

{/customerRequirements}

## System Configuration Completed

{#systemConfigured}*Yes* - The system has been configured successfully.{/systemConfigured}

{^systemConfigured}*No* - System configuration is pending.{/systemConfigured}

## Documents Provided

{#documents}

* {documentName}

{/documents}

## Training Schedule

|  |  |  |
| --- | --- | --- |
| **Session** | **Date** | **Trainer** |
| {#trainingSchedule}{session} | {date} | {trainer}{/trainingSchedule} |

## Additional Notes

*{notes}*