

Components of a

Customer Onboarding Journey

Use this guide to map your ideal customer onboarding journey. Each of the numbered sections represents a major step in the process, while the actions section identifies the specific steps/to-dos that your client and/or team will need to complete. Finally, consider how long each step in the process should take.



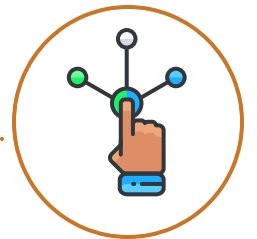
1 i.e. Welcome Call

- Actions by Client:
- confirm time for Welcome Call
- Actions by Team:
- email Welcome call agenda
 - walk through Checklist
 - set follow up call time



2

- Actions by Client:
- -
 -
- Actions by Team:
- -
 -
- Ideal time to complete:



3

- Actions by Client:
- -
 -
- Actions by Team:
- -
 -
- Ideal time to complete:



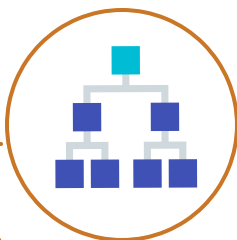
4

- Actions by Client:
- -
 -
- Actions by Team:
- -
 -
- Ideal time to complete:



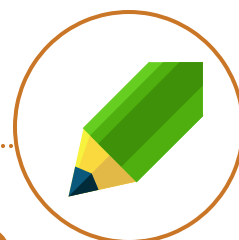
5

- Actions by Client:
- -
 -
- Actions by Team:
- -
 -
- Ideal time to complete:



6

- Actions by Client:
- -
 -
- Actions by Team:
- -
 -
- Ideal time to complete:



7

- Actions by Client:
- -
 -
- Actions by Team:
- -
 -
- Ideal time to complete:

* Note: Each onboarding journey may be different and will include different numbers of steps and/or actions.

