

Customer Success Onboarding Process:

Stages, Roles, and Deliverables

- Structured journey from contract signing to first realized value
- Drives retention, adoption, and expansion revenue
- Stages: handoff, kickoff, configuration, first value, adoption, transition
- Clear roles, deliverables, and ownership at each stage
- Business outcomes: faster time-to-value, lower churn, higher expansion



Roles	CS, Sales, Implementation, Product	CS, Customer Stakeholders, Implementation	CS, Implementation, Technical Team	CS, Customer Stakeholders, Solution Team	CS, Customer Stakeholders, Training/Enablement	CS, Customer Stakeholders
Deliverables	Account handoff summary, Customer context	Kickoff plan, Success criteria, Communication plan	Configured solution, Setup documentation	Value milestone achieved, Outcome validation	Training plan, Adoption resources	Handoff plan, Ongoing success plan
Ownership	Account Executive transfers to CS	Customer Success owns the kickoff	Implementation Lead with CS oversight	Customer Success owns milestone	Customer Success owns adoption	Customer Success owns transition

Why Onboarding Is a Strategic Revenue Lever



- Onboarding quality drives activation, retention, churn, NPS, and expansion revenue



- 30–50% of churn happens in the first 90 days; early experience shapes renewals

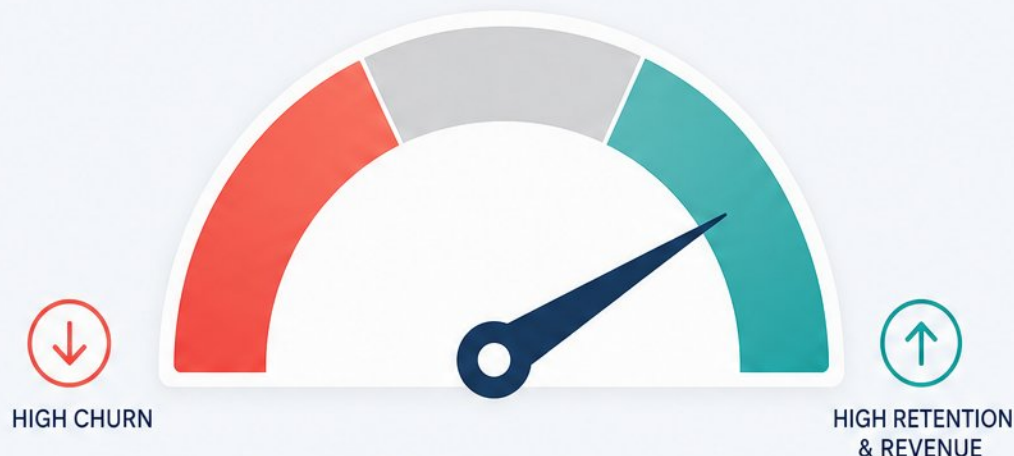


- Customers reaching first value within 14 days retain at 80%+ vs. 35–50% beyond 30 days



- Missing stages, owners, or deliverables creates common failure points

EARLY ONBOARDING IMPACTS RETENTION, CHURN, AND REVENUE



ONBOARDING JOURNEY



Core Concepts and Operating Principles



- **Handoff:** documented transfer of goals and context from Sales



- **Kickoff:** aligns outcomes, timeline, and named owners



- **Success criteria:** measurable milestones and exit criteria



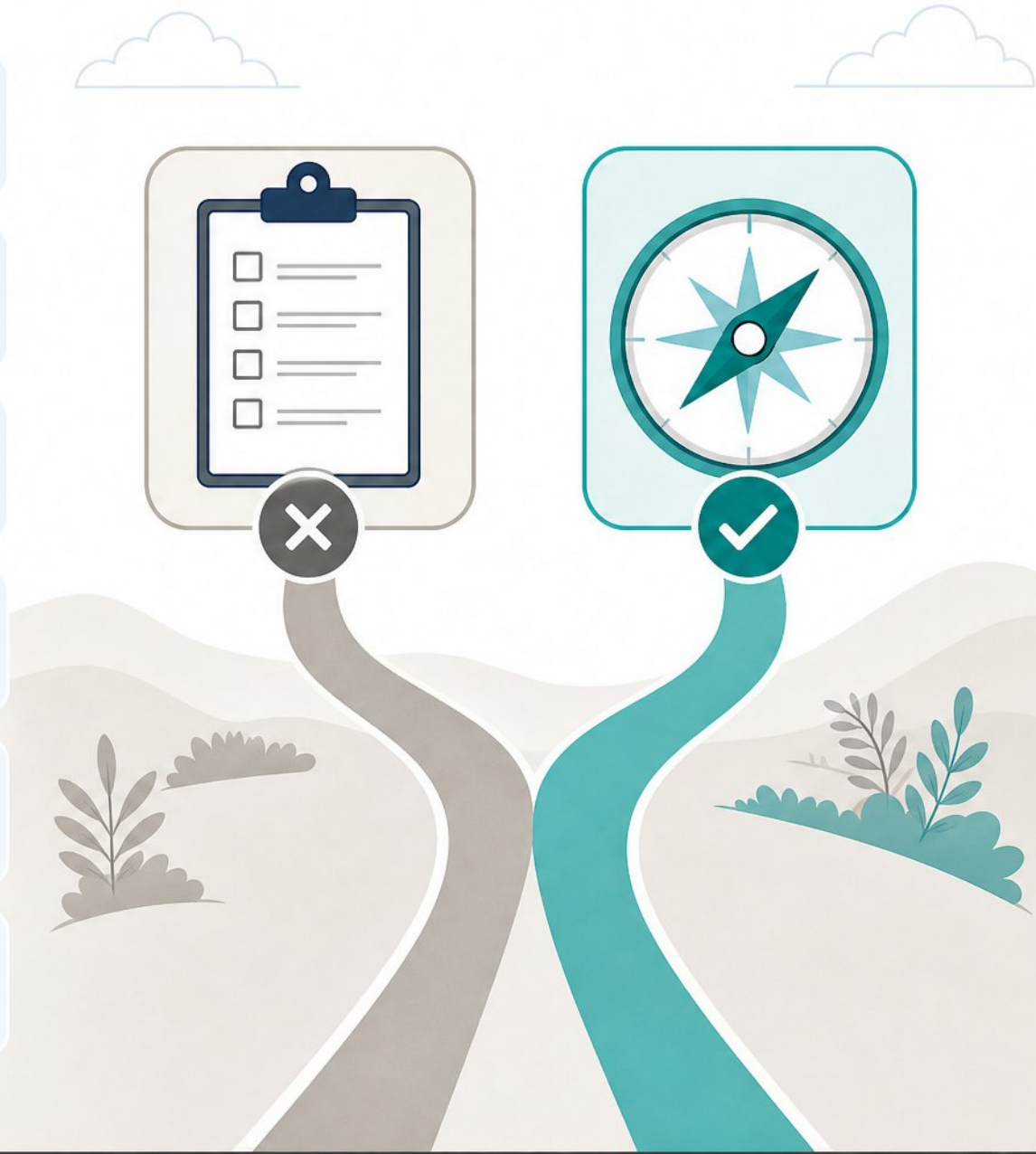
- **Onboarding** ≠ implementation, training, or product adoption



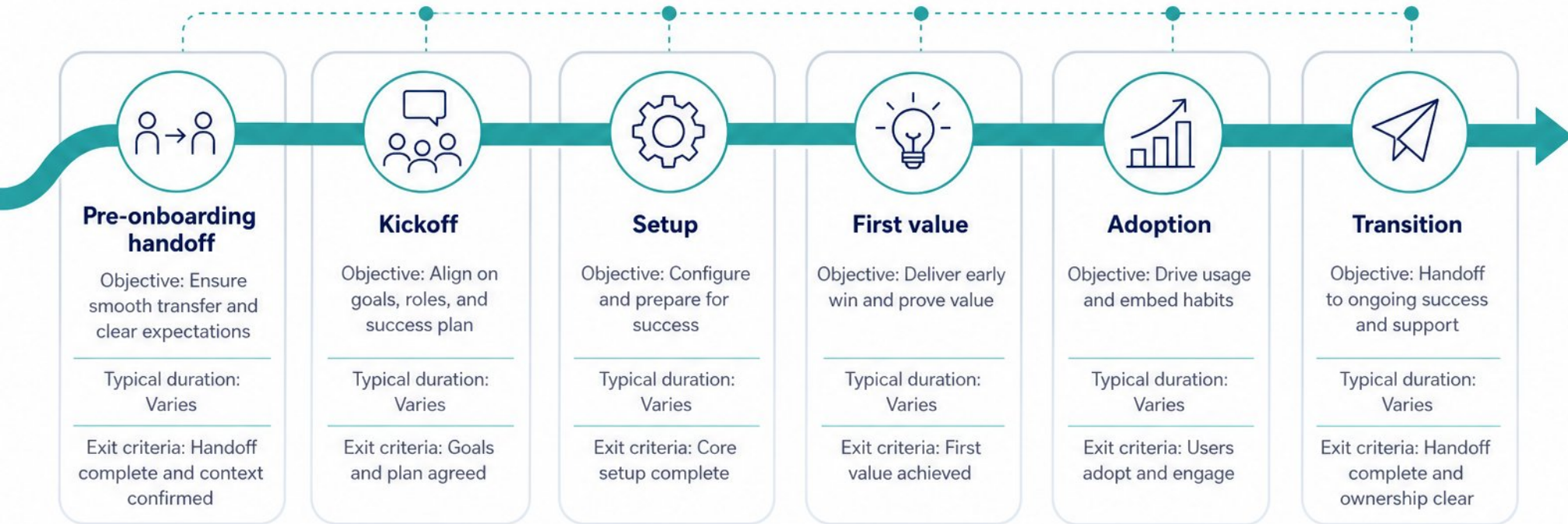
- **Outcome-based onboarding** beats checklist-based onboarding



- **Standardize terminology** to align CS and operations teams



The End-to-End Onboarding Journey at a Glance



- ✓ Standard six-stage sequence: pre-onboarding handoff, kickoff, setup, first value, adoption, transition
- ✓ Each stage has a clear objective, typical duration, and exit criteria
- ✓ Common risks: lost context, vague goals, technical delays, and unclear handoffs
- ✓ Journey flexes across segments: self-serve, low-touch, high-touch
- ✓ Time-to-first-value is the single metric most predictive of 90-day retention



Stage 1: Sales-to-Customer Success Handoff



- Handoff is the highest-risk handoff; context loss stalls time-to-value



- Capture goals, pain points, commitments, stakeholders, technical requirements



- Define minimum required fields, formal handoff review before kickoff



- Flag sales commitments as tasks with owners, not footnotes



Stage 2: Kickoff and Success Plan Alignment



- Align on outcome, target date, and named owners



- Build a one-page success plan with milestones and cadence



- Confirm the real buying group beyond deal signers



- Lead with the customer's outcome, not feature tours

ONE-PAGE SUCCESS PLAN



GOAL



TARGET DATE



NAMED OWNERS



MILESTONES & CADENCE







Stage 3: Setup, Configuration, and Data Collection



- Configuration is where timelines stall: integrations, imports, security reviews



- Start customer-side dependencies in parallel on day one



- Use structured intake forms, pre-filled from CRM and sales notes



- Assign named owners for every dependency—never just "the client team"

Configuration dependencies running in parallel





Stage 4: First Value and End User Enablement



- Onboarding ends at an outcome, not a training session; define the "aha moment" precisely



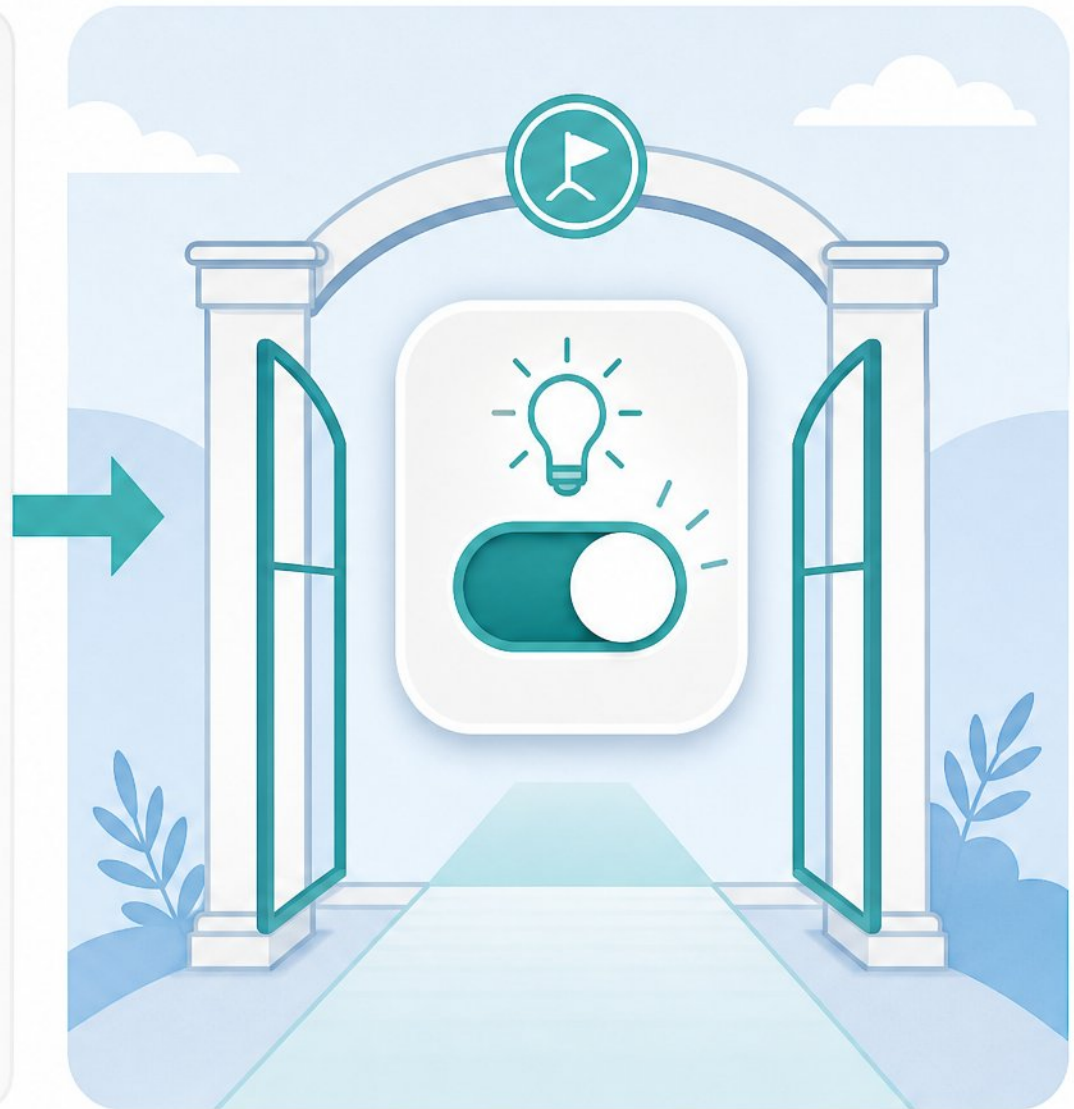
- Enable users in the product, not only via live calls; champions rarely train everyone



- Keep checklists to 5–7 steps to avoid overwhelming customers



- Confirm first value explicitly with the customer, not through internal updates





Stage 5: Adoption and Transition to Ongoing Success



- Deepen usage with role-specific training and feature expansion



- Close with explicit handover: achievements, open items, next milestones

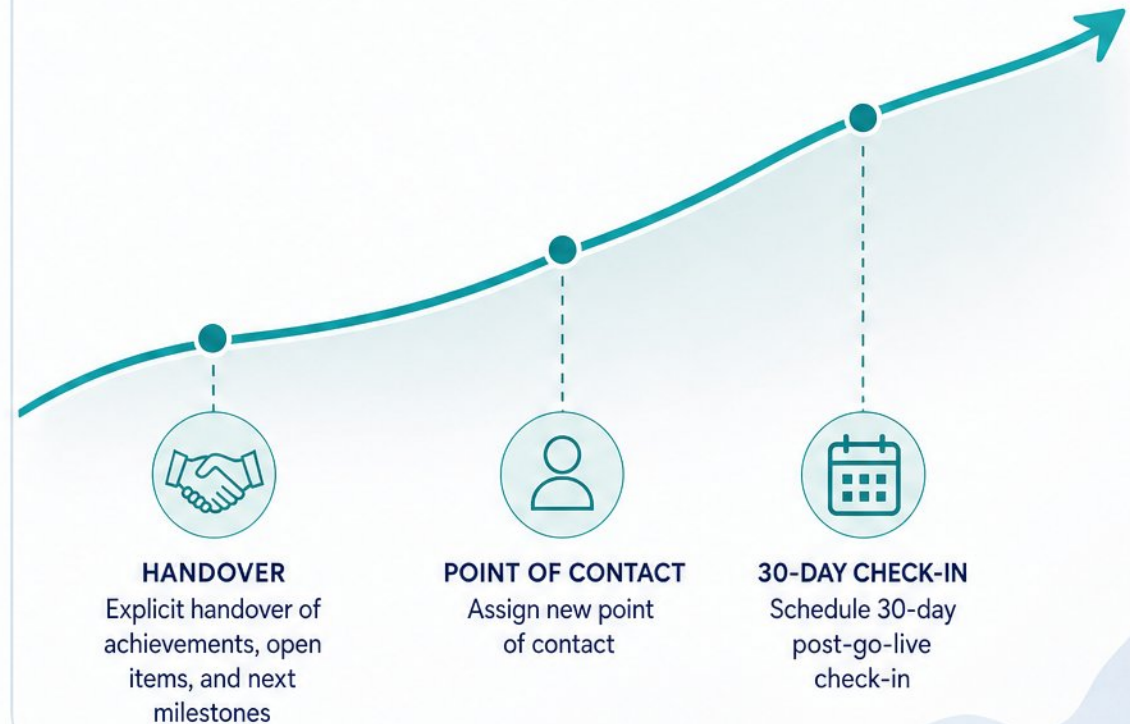


- Assign new point of contact and schedule 30-day post-go-live check-in



- Run internal retrospective and update master playbook after each closeout

POST-GO-LIVE ADOPTION JOURNEY



Roles and Responsibilities Across the Process



- Map CSM, Onboarding Specialist, Implementation, Sales, Support roles



- Name one stage owner; define handoffs between roles



- Use RACI to resolve accountability ambiguity



- Onboarding lead owns delivery; CSM owns long-term relationship

Process Stage	 Sales	 Onboarding Specialist	 Implementation	 Support	 CSM	 Product
Discover & Qualify	R	I	I	I	C	I
Onboarding	C	R	I	I	C	I
Implementation	I	C	R	I	C	C
Go-Live & Support	I	C	C	R	C	I
Adoption & Growth	I	I	I	C	R	C

R

Responsible
Does the work

A

Accountable
Owns the outcome

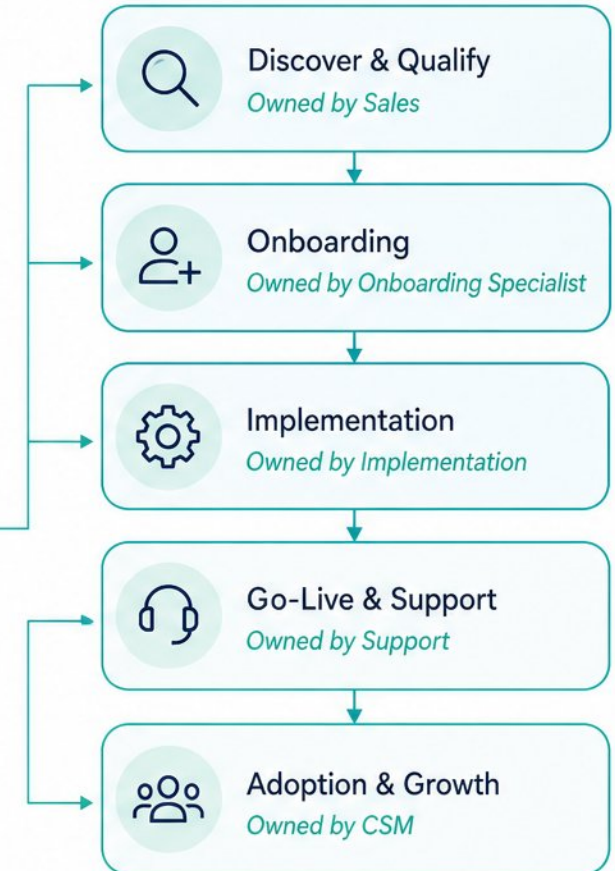
C

Consulted
Provides input

I

Informed
Kept informed

Process Stages & Ownership



Key Deliverables for Each Stage



 Deliverable							
	Success plan	Kickoff deck	Project timeline	Training materials	Configuration checklist	Adoption reports	Transition summary



- Success plan, kickoff deck, project timeline, training materials, configuration checklist, adoption reports, transition summary



- Each deliverable has a named producer and receiver



- Define quality standards and 'good' criteria for every deliverable



- Reuse templates and build an internal knowledge repository



Metrics, Milestones, and Exit Criteria



- Leading indicators: TTFV, activation rate, milestone completion, customer task completion, CES



- Lagging indicators: retention, early churn, expansion during onboarding cohort

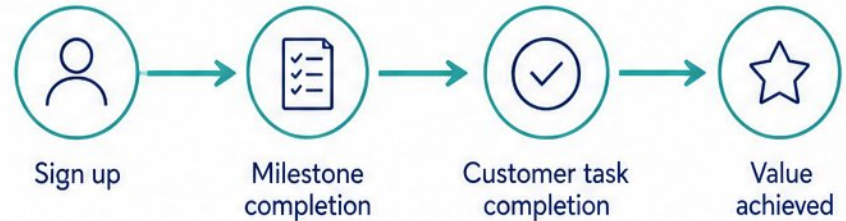


- 2026 benchmarks: TTFV under 14 days, onboarding completion over 80%, activation ~38%



- Build a simple dashboard with 5–6 metrics reviewed weekly, not monthly

Weekly Onboarding Dashboard



Time to First Value



Activation Rate



Milestone Completion



Retention



Customer Effort (CES)



**Review weekly,
not monthly**

Operationalizing the Process



- Standardize workflows with templates, playbooks, and CS platform config



- Automate reminders, progress updates, and milestone triggers



- Use escalation alerts for stalled tasks or disengaged customers



- Scale via self-serve, digital-led, and high-touch segments



- Apply change management for rollout and continuous improvement



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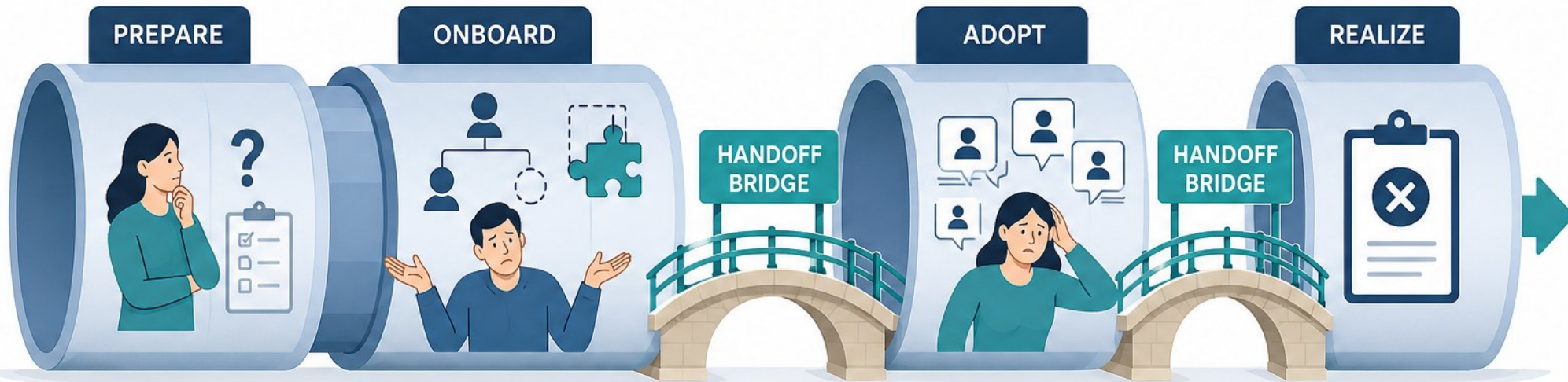
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Common Pitfalls and How to Avoid Them



Vague success plans, ownership gaps, missed handoffs, customer overload, unclear exit criteria



Assign clear owners and define exit criteria upfront



Use real examples of onboarding failures to guide recovery



Build feedback loops and continuous process improvement

Putting the Framework into Practice



- Audit your current onboarding flow; identify gaps, owners, and deliverables



- Build or refine a playbook using templates from the complete process



- Use AI agents to generate playbooks and automate tasks in minutes



- Create an action plan and apply the framework in your own organization



- Review next steps and resources for continued learning



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