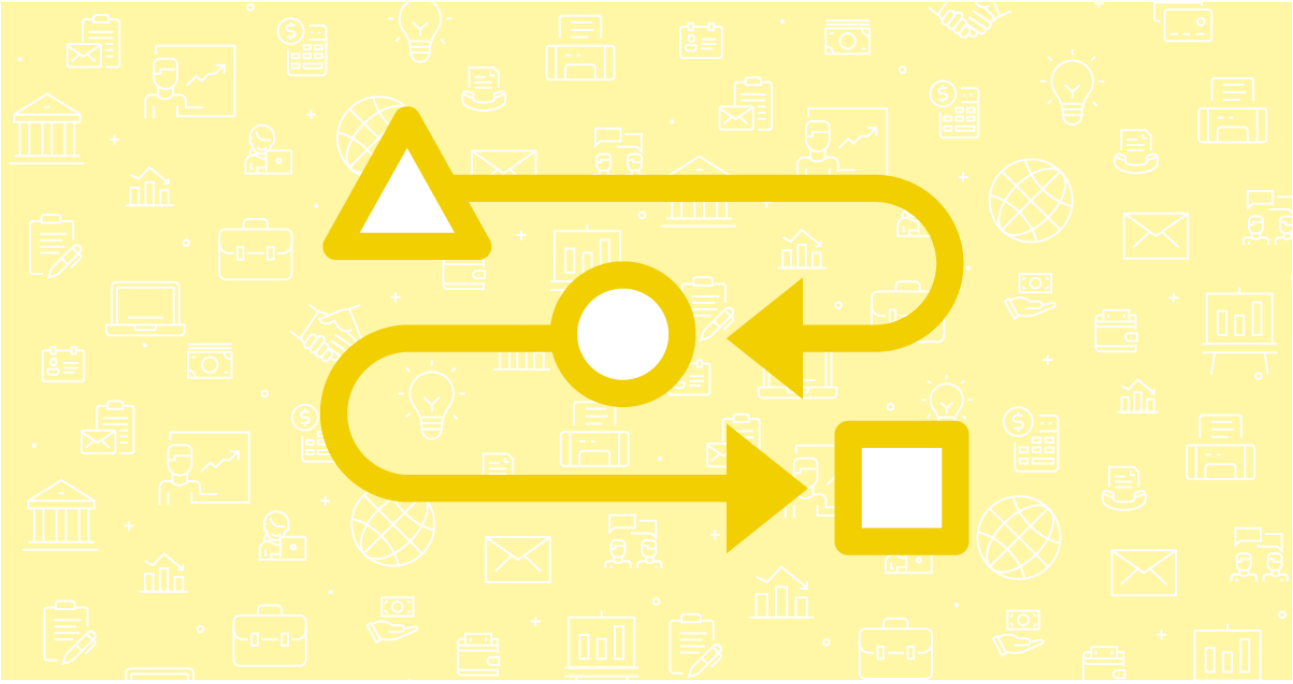
# SaaS Customer Service Onboarding Checklist

It's important that your customer has a personalize and unique experience online. Follow these process to ensure a great onboarding experience.



- [ ] CUSTOMER SIGN UP

  Is it easy for a customer to sign up. Do they sign up with a credit card or is there a trial period?

- [ ] CONTENT UPGRADE

  Does you customer receive something for signing up for your product or service? It can be something the download or is emailed to them. A few examples are, checklists, a guide, ebook, printable, templates, even a free trial.

- [ ] WELCOME EMAIL

  Decide if you are going to send out a welcome email to explain everything or have a welcome email with a series of drip emails throughout a trial period.

- [ ] PRODUCT TUTORIAL

  How does your customer find out how to use your product or tool? Are their help videos or questions? Do you email them to see if they have questions? Do you offer online support? Do you have webinars for you customers?

- [ ] FIRST LOGIN

  What does your customer experience when they first log in? Do you have a welcome page, links to tutorials, do they have to set up an account or import data?

- [ ] ADDITIONAL EMAILS

  If you have a drip campaign set up that's great.Drip emails should include things like explanations of features or tutorials. But do you offer a discount to sign up (CTA) after your customer's trial is over?

- [ ] NOTIFICATIONS

  Do you have notifications set for your customers. Reminders or pop-ups are a great tool to have.

- [ ] CUSTOMER SUPPORT

  Yes, your customer can contact support but do you email your customers a personalized email to offer support or onboarding? In your email you can also offer your customer a personalize phone call or set up a zoom.

- [ ] GIFTS OR SWAG

Keep your loyal customers or VIP customers happy by sending them something extra. It could be a discount, or even a company t-shirt.

- [ ] FOLLOW UP

Don't forget about old customers. It's always good to do a check-in email with them once in awhile. This can be as easy as an email. They might even give your some good advice or feedback.

- [ ] UPDATES

Keep track of your updates. Make sure when you do an update to your product or service that you also update ALL your materials including emails, help, and Q&As. Outdated information does not look good to your customers.

- [ ] CANCELATIONS

You don't want to think about your customers not liking or needing your tool, product, or service, but it's going to happen.

What does your offboarding look like? Do you make it easy for customers to cancel? Do you offer a discount to come back? Do you offer a chance for them to speak to you? Do you send out a email after they cancel?

Don't overwhelm or annoy your customer but you want to have a chance to win them back.

**Make and Share Free Checklists**
**checkli.com**