



New Customer Onboarding

This is a starter template for a new customer onboarding process. It's a static version of a more dynamic process that can be built and used in ProcessKit.

Edit this process and make it your own, and also put it to use in your repeatable projects:

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Learn how to make your business more predictable with our free video course:

[Process Automation for Service Companies](#)

1 Confirm the purchase or signed contract

New customer onboarding kicks off from the time customer has officially purchased or signed the contract to begin service.

Confirm that you've received all of the following:

- Valid payment and funds received
- Signed contract

Have the customer complete their onboarding form

2

Have the customer complete their onboarding form

Send the new customer our onboarding form to gather all of their key details.

This is the website address that you can send to them:

<https://examplecompany.com/customer-onboarding-form>

Once they've completed and submitted their information, mark this task as complete.

Editor's note: You may want to use our **Zapier integration** to connect your onboarding form to ProcessKit and have those responses automatically fill in the custom fields on this project. Or you might consider using our upcoming intake forms feature (coming soon).

3

Store the customer's details in this project

Fill in the following fields in this project's details tab:

- Customer's name
- Company name
- Customer's website
- Primary contact email address
- Select the service package that they purchased

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4

Schedule the kickoff call

Send the client your calendar booking link so they can schedule a time for the kickoff call with our team.

Once the call is booked, mark this task complete.

Editor's note: You might be able to use the [ProcessKit Zapier integration](#) to automatically mark this task as completed once the appointment has been booked via Calendly or whichever calendar booking tool you use.

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5

Complete the kickoff call

Once the kickoff call is complete, post your notes from the call as a comment on this task, so that it is stored here, as well as in the "Activity" tab for this project.

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6

Plan deliverable milestones

If we already have a process template & project type for the service package that this customer has purchased, then create a new project in ProcessKit using that type.

Our process template's date rules should automatically schedule the milestones, but you may need to make some custom adjustments to these.

If this is a custom project with unique deliverables and we don't have a ready-made process for it yet, then in ProcessKit create a new generic Project. Then create a custom task list and tasks to map out the milestones and deliverables for the

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Editor's note: You might want to reconfigure this step with dynamic rules (coming soon) to show one version or the other, depending on which selection was made for the customer's service package that they purchased. Learn more about this in the [ProcessKit knowledge base](#).

7 Send the customer an update on their onboarding

Send the customer an email to give them an update on where things stand with their onboarding to our service.

You can use (or edit) this email template:

Hi NAME,

We're making great progress on getting you all set up with our service!

Here's what we've done so far:

- Item A
- Item B

Here are some things we're still waiting on from you:

- Item C
- Item D

Please send those along at your earliest convenience. And don't hesitate to reach out with any questions.

Thanks,

Editor's note: You may want to use the template-based email sending feature (coming soon) in ProcessKit to automate the preparation and sending of the above email to the customer. Learn more about this in the [ProcessKit knowledge base](#).

8 Sales person check-in & referral

Now that the customer's onboarding is complete (or nearly complete), now is a good time for the sales person, or whoever initially spoke with this prospect to send a personal outreach to check in.

This is also an ideal time to ask for a referral to anyone else the client may know who they think would be a fit for our service.

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 **ProcessKit**

