



Customer Success Checklist

Stage	Action	Timeline	Owner	Status
Onboarding	Internal Handoff	Immediately after customer purchase		Not S... ▾
	Onboarding Kickoff Meeting	Within 14 days of customer start date		Not S... ▾
	Define Customer Goals & Objectives	1-2 days after kickoff meeting		Not S... ▾
Implementation	Implementation Planning	Maximum 1 week after kickoff meeting		Not S... ▾
	Training Workshop	While implementation is being completed and/or after successful implementation		Not S... ▾
Adoption	Quarterly Check-in	Same quarter as contract start date		Not S... ▾
Renewal	Renewal Preparation	6 months before contract end date		Not S... ▾
	Renewal Notice	90 days prior to renewal		Not S... ▾
	Upsell Proposal			Not S... ▾
Renewal	Renewal Contract	15-30 days prior to renewal		Not S... ▾