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…