



CRM Post-Sale Onboarding Checklist 2026

Client Profile & Account Setup

Essential steps to verify client information, assign account ownership, and ensure all foundational account details are accurately mirrored in the CRM.

Company Legal Name

Account Identifier/ID

Industry Vertical

- ☐ SaaS
- ☐ Manufacturing
- ☐ Healthcare
- ☐ Finance
- ☐ Retail
- ☐ Other

Account Activation Date

Enter date...

Client Business Overview

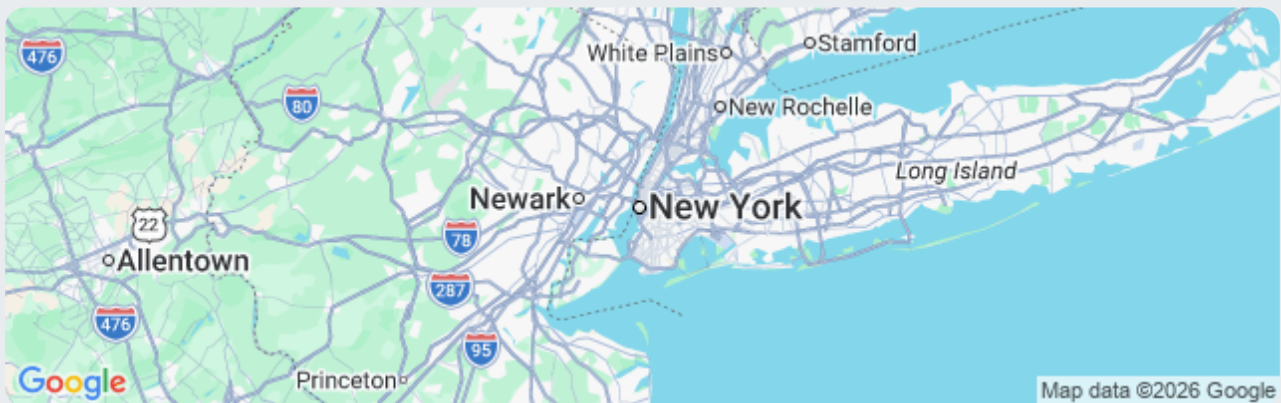
Write something...

Company Logo/Branding Assets

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Headquarters Address

 [Set My Current Location](#)



Contract & Documentation Verification

A review of signed agreements, service level agreements (SLAs), and legal documents to ensure all terms are captured and accessible within the CRM record.

Contract Effective Date

Enter date...

Signed Agreement Upload

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Contract Type

- ☐ Annual Subscription
- ☐ Monthly Subscription
- ☐ One-time Service
- ☐ Custom Enterprise Agreement

Required Documents Verified

- ☐ Master Service Agreement (MSA)
- ☐ Statement of Work (SOW)
- ☐ Non-Disclosure Agreement (NDA)
- ☐ Data Processing Agreement (DPA)

Special Contractual Terms or Notes

Write something...

Internal Compliance Officer Approval

Product/Service Provisioning Audit

Verification that the purchased products or services have been activated and that the corresponding entitlements are correctly logged in the customer profile.

Provisioned Service Tier

- ☐ Basic
- ☐ Professional
- ☐ Enterprise
- ☐ Custom/Bespoke

Service Activation Date

Included Feature Modules

- ☐ API Access
- ☐ Advanced Analytics
- ☐ Dedicated Support
- ☐ Custom Integrations
- ☐ SSO/SAML Authentication

Seat/License Count

Provisioning Confirmation Receipt



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Provisioning Discrepancy Notes

Stakeholder & Contact Mapping

Identifying and adding all key decision-makers, technical contacts, and billing administrators to the CRM hierarchy to ensure seamless communication.

Primary Stakeholder Name

Stakeholder Job Title

Stakeholder Role Type

- ☐ Decision Maker
- ☐ Technical Contact
- ☐ Billing Administrator
- ☐ End User
- ☐ Champion

First Contact Date

Enter date...

Organization Chart or Contact Directory

 Upload File

Initial Engagement & Kickoff Tasking

Automating or manual assignment of initial onboarding tasks, follow-up meetings, and the creation of the primary onboarding project timeline.

Scheduled Kickoff Meeting Date

Enter date...

Assigned Account Manager

- ☐ Account Executive
- ☐ Customer Success Manager
- ☐ Implementation Specialist

Meeting Agenda Summary

Write something...

Required Attendees

- ☐ Client Stakeholder
- ☐ Technical Lead
- ☐ Project Manager
- ☐ Executive Sponsor

Initial Discovery Notes

Write something...

Kickoff Presentation Deck

 Upload File

Internal Handover Protocol

Ensuring the Sales team has successfully transferred all critical intelligence, pain points, and discovery notes to the Account Management/CSM team.

Handover Completion Date

Enter date...

Handover Status

- ☐ Pending
- ☐ In Progress
- ☐ Completed

Transferred Knowledge Assets

- ☐ Discovery Call Notes
- ☐ Technical Requirements
- ☐ Budgetary Constraints
- ☐ Decision Maker List
- ☐ Competitor Context

Critical Client Nuances & Pain Points

Write something...

Handover Documentation/Meeting Recording

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Sales Representative Acknowledgment

Success Criteria & KPI Definition

Documenting the client's specific goals and the metrics that will be used within the CRM to track the health and success of the account.

Primary Customer Goal

Write something...

Detailed Success Metric Descriptions

Write something...

Target KPI Value

Enter a number...

KPI Review Milestone Date

Enter date...

Success Indicators to Track

- ☐ Churn Rate Reduction
- ☐ Feature Adoption Rate
- ☐ Net Promoter Score (NPS)
- ☐ Customer Lifetime Value (CLV)
- ☐ Time to First Value (TTFV)

Account Manager Approval

Communication Workflow Configuration

Setting up automated email sequences, notification triggers, and communication cadences to maintain consistent contact during the onboarding phase.

Primary Communication Channel

- ☐ Email
- ☐ Phone Call
- ☐ Video Conference
- ☐ Slack/Teams

Automated Email Triggers to Activate

- ☐ Welcome Email
- ☐ Onboarding Milestone Update
- ☐ Weekly Progress Report
- ☐ Check-in Survey
- ☐ Renewal Reminder

First Follow-up Date

Enter date...

Communication Cadence Frequency

Write something...

Custom Messaging Instructions

Write something...

Communication Template Templates

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Billing & Revenue Recognition Sync

Confirming that the subscription start date, renewal date, and billing frequency are accurately synced with the finance module or ERP integration.

Subscription Start Date

Enter date...

Contract Renewal Date

Enter date...

Billing Frequency

- ☐ Monthly
- ☐ Quarterly
- ☐ Annually
- ☐ Multi-year

Total Contract Value (TCV)

Enter a number...

Revenue Recognition Method

- ☐ Upfront
- ☐ Pro-rata
- ☐ Milestone-based

Signed Invoice or PO

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Included Revenue Streams

- ☐ Software License
- ☐ Implementation Fee
- ☐ Professional Services
- ☐ Support/Maintenance

Post-Onboarding Review & Closed-Loop Verification

Final audit to ensure all onboarding milestones were met and transitioning the opportunity status from 'Closed-Won' to 'Active Customer'.

Final Verification Completion Date

Enter date...

Onboarding Success Status

- ☐ Successfully Completed
- ☐ Completed with Minor Issues
- ☐ Delayed/Escalated

Verified Compliance Milestones

- ☐ Contract Uploaded
- ☐ Data Accuracy Confirmed
- ☐ Stakeholders Identified
- ☐ KPIs Documented

Post-Onboarding Summary & Lessons Learned

Write something...

Account Manager Approval

< Previous

> Next

✓ Finish

 **Generate Sample Report**