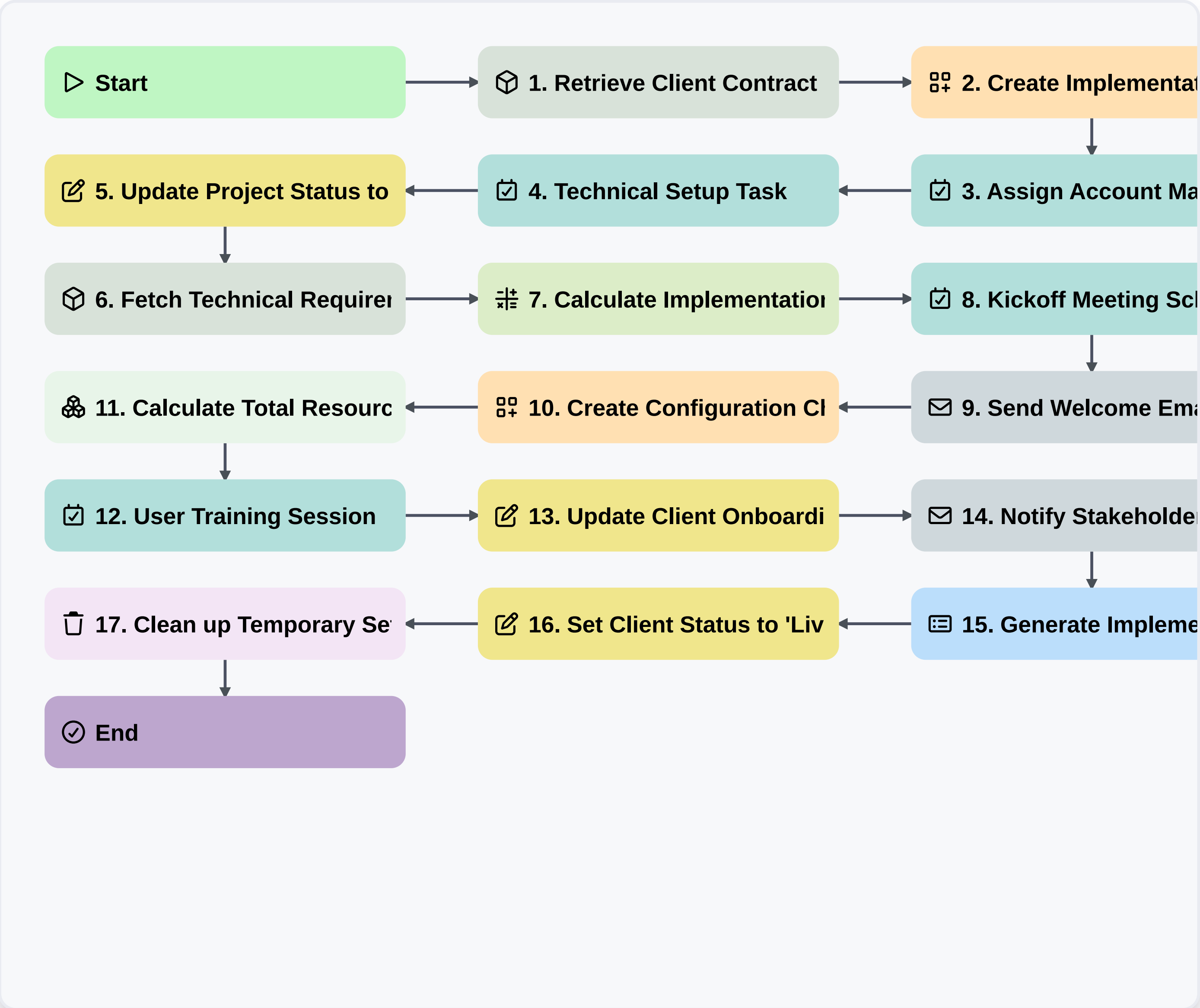
ChecklistGuro

Customer Implementation Workflow



Start
Start of the Workflow/Process.

1. Retrieve Client Contract Details
Fetch existing client information and contract terms from the Client Data Model.

2. Create Implementation Project
Generate a new entry in the Projects Data Model to track the specific implementation lifecycle.

3. Assign Account Manager
Create a task for the assigned Account Manager to review the client's requirements.

4. Technical Setup Task
Create a task for the Engineering team to configure the client's environment.

5. Update Project Status to 'In Progress'
Update the Implementation Project entry status to reflect that the kickoff has occurred.

6. Fetch Technical Requirements
Retrieve the specific technical configuration data submitted during the sales handoff.

7. Calculate Implementation Timeline
Calculate the expected completion date based on the project start date and estimated complexity.

8. Kickoff Meeting Scheduling
Create a task to schedule and organize the initial kickoff call with the client.

9. Send Welcome Email to Client
Send a formal introduction email to the client contact containing onboarding resources.

10. Create Configuration Checklist
Generate a predefined set of technical checklist entries related to the client's specific module.

11. Calculate Total Resource Allocation
Sum the total estimated hours from all assigned technical tasks to monitor budget.

12. User Training Session
Create a task for the Customer Success Manager to conduct training with the client's end-users.

13. Update Client Onboarding Progress
Update the percentage of completion in the Project Data Model based on finished tasks.

14. Notify Stakeholders of Completion
Send an email to the Sales and Success teams once the implementation is officially closed.

15. Generate Implementation Summary Report
Create a final report summarizing the configuration, timeline, and any issues encountered during implementation.

16. Set Client Status to 'Live'
Update the Client Data Model status from 'Onboarding' to 'Active/Live'.

17. Clean up Temporary Setup Data
Delete temporary staging entries or temporary configuration logs used during the setup phase.

End
End of the Workflow/Process.