



Client Success Hub

Client Implementation Checklist

1. Pre-Kickoff Preparation

- ✓ Review client's contract, scope, and goals.
- ✓ Gather client background, including industry, team, and challenges.
- ✓ Confirm key contacts and stakeholders.
- ✓ Prepare internal team briefing.

2. Kickoff Meeting

- ✓ Schedule and confirm meeting with client stakeholders.
- ✓ Set clear agenda and objectives for kickoff.
- ✓ Introduce team members and roles.
- ✓ Confirm communication channels and frequency.
- ✓ Review project timeline and milestones.
- ✓ Document client's immediate needs and expectations.

3. Onboarding Setup

- ✓ Provide client with access to platform/tools.
- ✓ Share onboarding resources: guides, tutorials, FAQs.
- ✓ Customize client account/settings as needed.
- ✓ Set up initial integrations or data imports.
- ✓ Confirm client training sessions schedule.

4. Data Collection & Configuration

- ✓ Collect necessary client data for setup (e.g., user lists, business rules).
- ✓ Configure system according to client requirements.
- ✓ Test configurations with client feedback.
- ✓ Identify potential blockers or risks early.



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5. Training & Enablement

- ✓ Deliver tailored training sessions to client team.
- ✓ Provide documentation and support contacts.
- ✓ Ensure client team is comfortable with core functionalities.
- ✓ Gather training feedback and adjust if needed.

6. Go-Live Preparation

- ✓ Confirm readiness with client and internal teams.
- ✓ Verify all configurations and integrations are functioning.
- ✓ Communicate go-live plan and contingency steps.
- ✓ Schedule go-live support availability.

7. Post Go-Live Support

- ✓ Monitor client usage and system performance.
- ✓ Address immediate issues or questions promptly.
- ✓ Conduct follow-up meetings to review progress.
- ✓ Share best practices and tips.

8. Continuous Improvement & Relationship Building

- ✓ Collect client feedback regularly.
- ✓ Proactively suggest optimizations or new features.
- ✓ Track client success metrics and report results.
- ✓ Plan for regular check-ins and long-term success strategy.