

New Customer Onboarding Checklist

Dear [Customer Name],

Welcome to [Company Name]! We are excited to have you with us. To ensure a smooth onboarding process, please complete the following checklist:

Onboarding Checklist

- Review and sign the Service Agreement
- Set up your account on our platform
- Provide required documents (e.g., ID, business registration)
- Complete the initial setup questionnaire
- Schedule your onboarding kickoff call
- Attend the product training session

If you have any questions during the onboarding process, please do not hesitate to reach out to us at [Support Email].

Thank you for choosing [Company Name]. We look forward to working together!

Best regards,

[Your Name]

[Your Position]

[Company Name]

[Contact Information]