

Customer Setup and Onboarding Checklist

Dear [Customer Name],

Welcome to [Your Company Name]! We are excited to have you on board. To ensure a smooth onboarding experience, please find below our Customer Setup and Onboarding Checklist:

Onboarding Checklist:

- Complete the Customer Information Form
- Review and sign the Service Agreement
- Schedule an onboarding meeting with our team
- Provide access to necessary systems and tools
- Set up payment information
- Complete training on our platform, if applicable
- Follow up on any outstanding items

If you have any questions or need assistance, feel free to reach out at [Contact Information].

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

Sincerely,

[Your Name]

[Your Position]

[Your Company Name]