

# Onboarding Procedure Checklist

Date: [Insert Date]

Dear [Customer Name],

Welcome to [Company Name]! We are excited to have you on board. To ensure a smooth onboarding process, please find below the checklist of tasks to be completed:

## Onboarding Checklist

1. **Account Setup:**
  - Confirm account details
  - Set up login credentials
2. **Documentation:**
  - Review and sign the service agreement
  - Provide necessary documentation
3. **Training:**
  - Schedule training session
  - Complete user training materials
4. **Integration:**
  - Discuss integration requirements
  - Complete technical setup
5. **Final Review:**
  - Review completed tasks
  - Confirm go-live date

If you have any questions or require assistance at any stage, please do not hesitate to reach out to us at [Contact Information].

Thank you for choosing [Company Name]. We look forward to a successful partnership!

Sincerely,  
[Your Name]  
[Your Position]  
[Company Name]