

Customer Onboarding Checklist

INTERNAL — Helix CS Operations (scanned doc)

OVERVIEW

First 30 days are the most predictive period for long-term retention. Every new customer (>\$10K ARR) gets a structured onboarding from a CSM.

WEEK 0 — KICKOFF

Schedule kickoff within 3 business days of contract signature. Attendees: customer's primary champion, executive sponsor, technical lead. Deliverables: success criteria document, milestone timeline, integration list.

WEEK 1 — TECHNICAL SETUP

Connect required integrations. Set up SSO if Enterprise. Configure user provisioning (manual or SCIM). Provide API keys to the technical lead. Verify the customer can complete their first 'happy path' workflow.

WEEK 2 — FIRST WORKFLOW

Help the customer build their first production workflow. This should be one they identified as a quick win during the sales process. Verify it runs successfully end-to-end. Document any platform limitations encountered.

WEEK 3 — TEAM ENABLEMENT

Schedule a training session with the broader team (5-15 attendees typical). Cover: navigating Helix, building basic workflows, where to get help. Share the recording.

WEEK 4 — REVIEW AND HANDOFF

Meet with the champion to review progress against success criteria. Identify next 2-3 use cases for the next quarter. Confirm the team knows how to file support tickets. Officially transition from onboarding to ongoing CSM cadence.

RED FLAGS DURING ONBOARDING

Champion is unreachable or non-responsive. No workflows have been built by the end of week 2. Technical lead reports unexpected platform limitations. Executive sponsor disengages.