

Customer implementation framework

Once you've decided your objectives with a customer, you can start to pinpoint the steps involved in your implementation strategy. After all, you want the steps in your implementation plan to be as smooth and straightforward as possible.

With the following framework, you'll be able to structure your implementation plan seamlessly.

Sales to post-sales handoff

| | Task name | Assignee | Due date | Task progress | Responsible team |
|--------------------------|-------------------------------|-------------------------------|----------|---------------|------------------|
| <input type="checkbox"/> | Contract signed | <i>[Enter sales rep name]</i> | April 13 | Done | Sales |
| <input type="checkbox"/> | Deal closed in sales platform | <i>[Enter sales rep name]</i> | April 12 | Done | Sales |

Customer onboarding

| | Task name | Assignee | Due date | Task progress | Responsible team |
|--------------------------|--|-------------------------|----------|---------------|------------------|
| <input type="checkbox"/> | Create implementation plan | <i>[Enter CSM name]</i> | April 19 | In progress | Customer success |
| <input type="checkbox"/> | Set up onboarding kick-off call | <i>[Enter CSM name]</i> | May 3 | In progress | Customer success |
| <input type="checkbox"/> | Onboarding kick-off call with customers + stakeholders | <i>[Enter CSM name]</i> | May 11 | Waiting | Customer success |

| | | | | | |
|--------------------------|--------------------------------------|-------------------------|--------|---------|------------------|
| <input type="checkbox"/> | Share implementation plan + schedule | <i>[Enter CSM name]</i> | May 11 | Waiting | Customer success |
|--------------------------|--------------------------------------|-------------------------|--------|---------|------------------|

Customer implementation

| | Task name | Assignee | Due date | Task progress | Responsible team |
|--------------------------|---------------------------------|-------------------------|-----------------|----------------------|-------------------------|
| <input type="checkbox"/> | Schedule onsite training + demo | <i>[Enter CSM name]</i> | April 19 | In progress | Customer success |
| <input type="checkbox"/> | Plan onsite training | <i>[Enter CSM name]</i> | May 3 | In progress | Customer success |
| <input type="checkbox"/> | Conduct training | <i>[Enter CSM name]</i> | May 11 | Waiting | Customer success |
| <input type="checkbox"/> | Follow-up on customer questions | <i>[Enter CSM name]</i> | May 11 | Waiting | Customer success |