

Onboarding Checklist

Information Materials						
1.0	Create Onboarding New Client Webinar					New Client Onboarding
	This webinar covers what makes a successful onboarding process and key activities to avoid.					
Sales Setup						
2.0	Create Opportunity Status	Setup	Setup Tables	Opportunities	Opportunities Status	
	Create an Opportunity Status called "New - New Client".					Opportunity Status Setup Table
3.1	Create Workflow Rule	Office	Marketplace	Workflow	CW Opportunity - New and New Client	
	Create a Workflow Rule so every when an opportunity is saved to a status of "New - New Client" input the Workflow Rule from the Marketplace.					Create Workflow Rule
Project Setup						
4.0	Create Project Board	Finance	Setup Tables	Project	Project Board	
	Create a Project Board to manage your onboarding projects. The recommended statuses to begin with are: Open In Progress On Hold In Progress At Completion					Project Board Setup Table
5.1	Create Onboarding Project Template	Office	Marketplace	Project Template	CW New Client Onboarding	
	Create a project template to standardize the onboarding process. Input a sample project plan from the Marketplace.					Onboarding Project Template
6.2	Create Onboarding Track	Office	Marketplace	Track	CW New Client Welcome	
	Create a track to automatically notify the client of key information throughout the onboarding process. Input a sample onboarding track from the Marketplace.					Create Onboarding Track

Onboarding Checklist Connectwise University Learn Best

Roman Wölfel



Onboarding Checklist Connectwise University Learn Best:

Embark on a breathtaking journey through nature and adventure with is mesmerizing ebook, Natureis Adventure: **Onboarding Checklist Connectwise University Learn Best** . This immersive experience, available for download in a PDF format (*), transports you to the heart of natural marvels and thrilling escapades. Download now and let the adventure begin!

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