The purpose of the **Sample Customer On-Boarding Plan/SOW** is NOT to replace your existing document but to complement it with components that lend themselves to a stronger customer-outcome focus for the on-boarding process.

# Sample Customer On-Boarding Plan Components

## Engagement Objectives

* Pull “operational business outcomes” from Sales Transition Brief *Section A.*

## Departments/Business Functions Impacted

* Pull “departments/business functions” from Sales Transition Brief *Section A.*

## Targeted Job Tasks & Workflows

* Pull “job tasks” from Sales Transition Brief *Section B.*

## Metrics That Define Project Completion

* Mutually defined by CS and customer.
* Define them such that they can be easily measured/quantified.

## Artifacts & Deliverables

* Itemize any deliverables or artifacts required for successful completion.

## Dates

* Project start date and targeted completion date.

## On-Boarding Activities & Resources

* Required Activity
  + Resource resources from customer.
  + Resource resources from CS.