Maetrix 30/60/90-Day Customer Onboarding Plan

A sample onboarding plan by Melissa Ito | Customer Onboarding Portfolio

Maetrix is a fictional customer. All targets are illustrative, based on typical mid-market SaaS benchmarks.

One-Page Summary

Customer: Maetrix (mid-market, about 75 users across Sales, Ops, and Support)

Goal: Replace spreadsheets and cut manual reporting time

Timeline: 90 days, from kickoff to handoff to the Customer Success Manager

Time to first value (TTFV): Live data in the platform and one real workflow completed end to end by **Day 21**

Phase	Focus	Key Milestones	Key Outcomes
Days 1-30: Foundation	Configure, connect, and launch with a pilot team	Kickoff and signed-off success plan; CRM integration; validated data import; admin training; pilot team (about 15 users) live	TTFV in 21 days or less; 80%+ of pilot users activated; 0 open critical blockers
Days 31-60: Rollout	Expand from pilot to all teams and build habits	Pilot retrospective; role-based training; full rollout to 75 users; first custom dashboard; 2-3 internal champions trained	85%+ activation; 60%+ weekly active users; 85%+ training completion; CSAT of 4/5 or higher

Phase	Focus	Key Milestones	Key Outcomes
Days 61-90: Value and Handoff	Prove ROI and make usage self-sustaining	Before/after results review; advanced feature adoption; workflow documentation; executive success review; warm handoff to CSM	75%+ weekly active users; measurable outcome hit (e.g., manual reporting time down 30%); onboarding NPS of 40+; Sponsor sign-off

Cadence: Weekly working calls in Phase 1, biweekly in Phases 2 and 3, with executive reviews at Days 30, 60, and 90.

Top risks and responses: Quiet project lead (escalate to the Sponsor), failing data import (bring in a solutions engineer and simplify scope), low post-rollout logins (champion-led refresher and permissions check).

Why I Designed It This Way

1. I defined "value" before anything else. Most onboarding fails because the customer and the vendor never agree on what success looks like. I anchored the plan to a specific time-to-first-value target (Day 21) agreed at kickoff, so every task in the first month ladders up to one clear finish line.

2. I started with a pilot instead of a full launch. Launching 75 users at once multiplies every problem: bad data, confusing workflows, unclear permissions. A pilot of about 15 users lets us find and fix issues while the stakes are low, and it creates early wins and credibility that make the full rollout smoother.

3. I paired training with real work, not feature tours. Training is role-based (Sales, Ops, and Support each get their own session) and tied to workflows people actually do. Recordings and a quick-reference guide mean new hires and absent users aren't left behind, which keeps the plan scalable.

4. I built in internal champions. Adoption sticks when customers help each other. Training two or three champions in Phase 2 reduces dependence on me, lowers support volume, and keeps momentum alive after the handoff.

5. I chose metrics that measure outcomes, not just activity. Completed training sessions are easy to count, but they don't prove value. The plan tracks activation, weekly active usage, support tickets per user, and a business outcome tied to Maetrix's original goal (less manual reporting). This also gives the CSM evidence for renewal and expansion conversations.

6. I matched the check-in cadence to risk. Early weeks carry the most risk, so contact is frequent and tapers as the customer gains confidence. Executive reviews at Days 30, 60, and 90 keep the Sponsor informed and engaged without overloading them.

7. I planned for things going wrong. Real onboardings stall: contacts go quiet, imports fail, logins lag. The risk table gives each red flag a pre-planned response, so problems get handled early rather than discovered at the Day-60 review.

8. I treated the handoff as part of onboarding, not the end of it. The plan closes with a three-way handoff call so the CSM inherits the goals, history, champions, and open items. A customer who feels passed along is a churn risk, so the transition is deliberate and warm.

Scenario and Assumptions

Maetrix is a mid-market company with about 75 users across Sales, Ops, and Support. They signed an annual contract for a B2B SaaS platform that needs a CRM integration and a data import. Their goal is to replace spreadsheets and cut manual reporting time.

Roles

Abbreviation	Role
OS	Onboarding Specialist (me)
CSM	Customer Success Manager, who owns the long-term relationship
SE	Solutions or Technical Engineer
Sponsor	Maetrix executive sponsor
Lead	Maetrix project lead / admin
Support	Support team

Success definition (agreed at kickoff): Time to first value is reached when Maetrix's admin has live data in the platform and the first team runs one real workflow end to end, targeted by **Day 21**.

Pre-Kickoff (Days -5 to 0)

Activity	Owner
Sales-to-onboarding handoff: goals, promises made, stakeholders, risks	Sales + OS
Send welcome email, intake questionnaire, and kickoff scheduling link	OS
Draft success plan from the intake answers	OS

Days 1-30: Foundation and First Value

Goal: Get Maetrix configured, connected, and live with a pilot team.

Week	Milestone	Owner	Done when
1	Kickoff call: confirm goals, timeline, stakeholders, success criteria	OS, Sponsor, Lead	Success plan signed off
1	Admin accounts and permissions set up	Lead, OS	Admin can log in and invite users
2	CRM integration configured and tested	SE, Lead	Test records sync both ways
2	Data import (cleaned and mapped)	Lead, SE	Import validated, error rate under 2%
3	Admin training session (recorded)	OS	Admin completes setup tasks unassisted
3	**Pilot team live (about 15 users)**	OS, Lead	First real workflow completed (**TTFV**)

Week	Milestone	Owner	Done when
4	Day-30 review: progress, blockers, feedback	OS, CSM, Lead	Gaps logged, Phase 2 plan confirmed

Check-ins: Weekly 30-minute working call with the Lead, a quick Slack or email pulse mid-week, and a Day-30 review with the Sponsor invited.

Day-30 metrics

- Time to first value of 21 days or less
- 90% or more of setup tasks complete
- Pilot users activated: 80% or more logged in and completed one key action
- Open critical blockers: 0

Days 31-60: Rollout and Adoption

Goal: Expand from the pilot to all teams and build habits.

Week	Milestone	Owner	Done when
5	Pilot retrospective, then adjust configuration and workflows	OS, Lead	Changes documented
5-6	Role-based training for Sales, Ops, and Support (live plus recorded)	OS	85% or more attendance or video completion
6	**Full rollout to all 75 users**	Lead, OS	All users invited and activated
7	Build the first custom report or dashboard	OS, Lead	Report in weekly use by managers
7	Identify and train 2-3 internal champions	OS, Lead	Champions answer first-line questions
8	Day-60 review with the Sponsor	OS, CSM, Sponsor	Adoption data shared, risks addressed

Check-ins: Biweekly working calls with the Lead, a monthly progress email to the Sponsor, and a 15-minute check-in with each champion.

Day-60 metrics

- Activation rate of 85% or more of invited users
- Weekly active users of 60% or more
- Training completion of 85% or more
- Support tickets per user trending down week over week
- Mid-onboarding CSAT of 4 out of 5 or higher

Days 61-90: Value Realization and Handoff

Goal: Prove ROI, make usage self-sustaining, and transition to the CSM.

Week	Milestone	Owner	Done when
9	Compare results against baseline goals (for example, hours spent on manual reporting)	OS, Lead	Before/after data collected
10	Advanced feature session (automations, integrations)	OS, SE	1-2 advanced features adopted
11	Document Maetrix's workflows and a quick-reference guide	OS, Lead	Guide shared with all users
12	**Success review with the Sponsor:** results, ROI, roadmap	OS, CSM, Sponsor	Sponsor confirms goals met
12	**Warm handoff to the CSM**	OS, CSM	CSM owns the account, plan transferred

Check-ins: Biweekly working calls tapering to monthly, then a Day-90 executive success review and a three-way handoff call (OS, CSM, Lead).

Day-90 metrics

- Weekly active users of 75% or more
- At least 2 core features adopted by every team
- A measurable outcome hit (example: manual reporting time down 30%)
- Onboarding NPS of 40 or higher
- Sponsor sign-off on completion
- Healthy account score on the CSM's dashboard

Risk Signals and Responses

Red flag	Response
Lead goes quiet for 5+ days	Escalate to the Sponsor, offer a shorter working session
Data import keeps failing	SE joins a working call, simplify the import scope
Low login rates after rollout	Run a champion-led refresher, check for permission or SSO issues
Sponsor disengaged	CSM books an executive touchpoint tied to their business goal

Key Metrics Glossary

- **Time to first value (TTFV):** Days from kickoff until the customer completes one real workflow with live data.
- **Activation rate:** Share of invited users who log in and complete a key action.
- **Weekly active users (WAU):** Share of licensed users active in a given week.
- **Onboarding CSAT / NPS:** Customer satisfaction and loyalty scores collected during and at the end of onboarding.
- **Early churn risk:** Signals such as low logins, quiet stakeholders, or stalled setup tasks in the first 90 days.

Appendix A: Welcome Email

Sent by the Onboarding Specialist within 24 hours of the sales handoff, before kickoff.

To: Maya Chen (Maetrix project lead)

Cc: Maetrix executive sponsor; Maetrix CSM

Subject: Welcome to Maetrix, here's how our first 90 days will work

Hi Maya,

Welcome aboard, and congratulations on getting started! I'm [Your Name], your Onboarding Specialist, and I'll be your main point of contact from now until you're fully up and running. I've read through the notes from your conversations with our sales team, and

I'm excited to help you replace those spreadsheets and cut the time your team spends on manual reporting.

What we're aiming for

Our first goal is to get you to your first win quickly: live data in the platform and one real workflow running end to end by **Day 21**. From there, we'll roll out to your full team of about 75 users and show measurable results by Day 90.

What happens next

1. **Pick a kickoff time.** Please grab a 60-minute slot here: [scheduling link]. We'll invite your executive sponsor for the first 15 minutes.
2. **Complete the short intake form.** It takes about 10 minutes and tells me which systems you use, who your key users are, and what success looks like for you: [form link].
3. **Line up a few people.** Please identify an admin for the platform and someone who knows your CRM and current spreadsheets well. We'll need them for setup in week 2.

What you'll get from me

- A weekly working call during the first month
- A shared success plan so everyone can see milestones and owners
- Recorded training sessions and quick-reference guides for your team
- A direct line to me for any questions in between: [email] or [phone]

If anything about your goals, timeline, or team has changed since you talked with sales, please let me know. It's much easier to adjust now than three weeks in.

I'm looking forward to working with you.

Best,

[Your Name]

Onboarding Specialist, [Company]

[Phone] | [Email] | [Scheduling link]

Why I wrote it this way: The email names the goal and the Day-21 target up front, gives the customer exactly three clear actions, and sets expectations for how I'll work. It also invites corrections early, which prevents mismatched expectations from surfacing later.

Appendix B: Kickoff Call Agenda

Meeting: Maetrix Onboarding Kickoff

Length: 60 minutes (video call, recorded for those who can't attend)

Attendees: Maetrix executive sponsor, project lead (admin), 1-2 team leads from Sales, Ops, and Support; our Onboarding Specialist, Customer Success Manager, and Solutions Engineer

Pre-reads (sent 2 days before): Draft success plan, intake form responses, data import template

Goals for this meeting: Align on success criteria, confirm the timeline and owners, and leave with clear next steps for week 1.

Time	Topic	Lead	Outcome
0:00-0:05	Welcome and introductions: roles on both teams	OS	Everyone knows who does what
0:05-0:15	Business goals and success definition: why Maetrix bought, what "great" looks like in 90 days, Day-21 first-value target	Sponsor, OS	Success criteria confirmed in writing
0:15-0:20	*Sponsor leaves or stays at their discretion.* Executive questions and priorities	Sponsor	Sponsor expectations captured
0:20-0:35	Walkthrough of the 90-day plan: three phases, milestones, owners, check-in cadence	OS	Timeline agreed, adjustments logged
0:35-0:45	Technical setup: CRM integration, data import, permissions, SSO needs	SE, Lead	Technical requirements and blockers identified
0:45-0:52	Risks and dependencies: who needs to be involved, when, and what could slow us down	OS, Lead	Risks listed with owners
0:52-0:58	Next steps for week 1: tasks, owners, dates	OS	Action items assigned

Time	Topic	Lead	Outcome
0:58-1:00	Wrap-up and questions	OS	Everyone leaves with next-call date

Questions to ask during the call

- What would make you say this was a great decision six months from now?
- Which team will feel the most pain or benefit first?
- Who is likely to resist the change, and what are their concerns?
- Are there any upcoming deadlines, freezes, or busy periods we should plan around?
- How do you currently build your reports, and how long does it take?

After the call (within 24 hours)

1. Send a recap email with decisions, action items, owners, and due dates.
2. Share the updated success plan and the recording.
3. Schedule the recurring weekly working call.
4. Log risks and stakeholder notes in the CRM or customer success platform.

Why I designed it this way: The agenda spends the most time on goals and the plan, because alignment is the biggest predictor of a smooth onboarding. It saves technical detail for the people who need it, keeps the executive's time short and focused, and ends with owners and dates so momentum carries into week 1.