

THE CLIENT

SUCCESS KIT CHECKLIST

Welcome guide:

- Introduction to Your Company: Overview of your business, mission, and values.
- Team Introductions: Photos and bios of key team members.
- Contact Information: How and when to reach out for help.
- Key Policies: Important policies clients should be aware of.

Onboarding Materials:

- Step-by-Step Instructions: Detailed guides on how to get started with your products or services.
- Tutorial Videos: Visual aids to help clients understand your offerings better.
- Checklists: To ensure clients don't miss any crucial steps.

FAQs:

- Common Questions: A comprehensive list of frequently asked questions and their answers.
- Troubleshooting Tips: Solutions for common problems clients might face.

Best Practices and Tips:

- Usage Tips: How to get the most out of your products or services.
- Case Studies: Examples of how other clients have successfully used your offerings.



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Support Resources:

- Help Desk Information: How to access your support team.
- Knowledge Base: Links to articles, guides, and other helpful content.
- Community Forums: Information on how to join and participate in community discussions.

Feedback Channels:

- Survey Links: Easy access to feedback forms.
- Direct Contact Options: How to provide feedback directly to your team.

Renewal and Upsell Information:

- Product Catalog: Overview of additional products or services.
- Special Offers: Information on promotions or discounts.



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CLIENT HAPPINESS MANAGER

