



THE FIRST 4 WEEKS LEADERSHIP CHECKLIST

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My first 30-days as a new Customer Success Leader mapped out week-by-week with key activities. Take a look at how I onboarded and set myself up for long term success at ClientSuccess.



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LEADERSHIP ONBOARDING WEEK 1 CHECKLIST

- Announce your arrival! Make sure the company knows you have arrived and drum up some excitement!

- Get settled - Do you have access to all the right tools, can you log into everything, customize all of your settings etc.

- HR Fun stuff - Fill out all of the necessary paperwork, benefits, direct deposit, 401k, submit any pre-planned PTO etc.

- Start listening - Make sure you are added to all necessary internal meetings and start taking notes. Figure out what role you should play in these discussions.

- Review all available information about your team; previous reviews, compensation, promotions and awards etc. Get ready for your 1:1 meetings in week 2.

- Take notes! Make sure to capture as much as possible, it will serve you well.



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LEADERSHIP ONBOARDING WEEK 2 CHECKLIST

- 50 min meetings with each person in your organization - Make sure to come prepared, I always prepare a document with a framework of things I want to cover and questions to ask. (I'll share this too)

- 50 min meetings with each cross-functional leader - Comprepared with an agenda and questions you'd like to align on. Don't leave the the meeting without asking this - "What can I do to make your job easier tomorrow?"

- Set-up all of your recurring 1:1 meetings with your team; be sure to align on expectations and agenda ownership. If you are planning a team meeting as well get that on the calendar.

- Data, Data, Data - Now that you have access to all of your systems, start looking at what information is available

- Start to review the industry landscape - Research your competitors and the market



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LEADERSHIP ONBOARDING WEEK 3 CHECKLIST

- Set up product training with someone in your organization - Depending on the complexity of the product you may need a few sessions, so proactively lock those down

- Set up any training necessary for your internal tech stack - CRM, ticketing platform, HR & Recruiting tools, Project Management solutions etc.

- Dig into your customer usage data and analytics so you can identify how your customers are using your product - Identify gaps, patterns and anything you can use

- Get a handle on all processes - internal and external; begin to document where there are gaps and opportunities to optimize

- Map out the desired customer journey - start to develop your plan to partner with your customers; design what great will look like and be sure to design in "outside-in"



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LEADERSHIP ONBOARDING

WEEK 4 CHECKLIST

- Ride along on customer calls with your team - start introducing yourself into the partnership but this is an opportunity to hear how the team supports customers today

- Get ahead of Risk - Map out customers that need your time and attention and start a plan to intervene and support as needed

- Begin an Executive outreach program to meet with and "interview" your customers so that you can listen and learn from their experiences and to identify areas of opportunity

- Design and develop your customer dashboards and reports that you will use for your daily, weekly and monthly management

- Identify 2-3 quick wins that you can tackle that will have material impact on your team, your business and your customers