

The 30-Day SaaS Customer Onboarding Checklist

12 steps · Turn first-time signups into activated, long-term customers.

Days 0–7 · Welcome and first value

- ☐ **1. Send a personalized welcome email within minutes of signup.** Confirm the decision, set expectations, and point to exactly one next step.
- ☐ **2. Strip friction out of setup.** Pre-fill what you know, defer non-essential fields, never block on a long form before first value.
- ☐ **3. Guide users to the core “aha” action with an interactive product tour.** Walk them to the one action that proves value — not a full feature tour.
- ☐ **4. Define and instrument your activation milestone.** The single action that predicts retention; measure how many reach it and how fast.

Days 8–21 · Adoption and habit

- ☐ **5. Trigger behavior-based nudges for stalled users.** A targeted in-app message or email, not a generic drip.
- ☐ **6. Reveal the second high-value feature once the core action is done.** Progressive disclosure beats dumping every feature at once.
- ☐ **7. Put self-serve help at the point of friction.** Searchable knowledge base, contextual tooltips, and on-demand demos.
- ☐ **8. Run a one-question in-app pulse.** “Did you find what you needed?” surfaces friction while you can still fix it.
- ☐ **9. Celebrate quick wins.** Progress indicators and milestone emails build momentum and pull users back.

Days 22–30 · Activation to retention

- ☐ **10. Reach out to high-fit accounts that haven’t activated.** A short human check-in (or a well-timed automated one) recovers near-misses.
- ☐ **11. Open the expansion path.** Invite teammates, connect integrations, surface advanced workflows.
- ☐ **12. Measure, then feed it back.** Track time-to-value, activation rate, and week-4 retention; tighten steps 1–11 each cycle.

Build the interactive product tours behind steps 3 & 7 — free.
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