Enterprise SaaS Customer Onboarding Playbook

A structured 30/60/90-Day Framework for Driving Adoption, Health & Retention

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1. Purpose & Philosophy

This playbook standardizes how a Customer Success Manager (CSM) onboards a new enterprise or mid-market account from contract signature through steady-state adoption. It is built on a structured 30/60/90-day check-in model that, when applied across a high-volume portfolio, has sustained 95.8% CSAT and a 75.05% Customer Acceptance Rate.

The goal is not just "go-live" — it is measurable adoption, an accurate account health signal, and an early-warning system for churn risk, all while giving the client a consistent, low-friction experience regardless of which CSM they are assigned.

2. Onboarding Principles

- Structure over improvisation: every account follows the same milestone cadence, adapted in depth (not skipped) for account tier.
- Proactive, not reactive: check-ins are scheduled ahead of risk, not triggered by a support ticket.
- One source of truth: a single account health record tracks status, risk flags, and next actions.
- Cross-functional bridge: the CSM is the named liaison between the client and Engineering / Product / Support during onboarding.
- Close the loop: every milestone ends with a documented success criterion — not a vague "check-in call happened."

3. Day 0 — Kickoff & Foundation

Milestone	Owner / Actions	Success Criteria	Risk Flags
Day 0-1	CSM sends welcome email; schedules kickoff call within 3 business days	Kickoff call confirmed on calendar	No response after 2 outreach attempts
Day 0-3	Internal handoff review: Sales → CSM (contract scope, key stakeholders, technical footprint)	Handoff doc completed and stored	Missing technical or commercial context from Sales
Day 3-5	Kickoff call: introduce success plan, confirm stakeholders, set expectations & communication cadence	Success plan shared and acknowledged by client sponsor	No identified executive sponsor

4. Day 30 — Foundation Check-in

Objective: confirm technical setup is on track and early usage signals are healthy.

Milestone	Owner / Actions	Success Criteria	Risk Flags
Setup	Confirm core configuration / integration is complete; resolve blockers with	Core platform configured; no open P1/P2 setup issues	Configuration delays beyond 2 weeks

Milestone	Owner / Actions	Success Criteria	Risk Flags
	Engineering		
Enablement	Deliver end-user training or enablement session(s)	Key users trained; training completion tracked	Low attendance or engagement in training
Adoption	Review early login / usage data against expected baseline	Usage trending toward baseline within 30 days	Usage significantly below expected baseline
Relationship	First formal check-in call with stakeholder	Check-in completed; feedback logged	Stakeholder disengaged or unresponsive

5. Day 60 — Adoption & Value Check-in

Objective: validate that the client is realizing early value and course-correct where adoption is lagging.

Milestone	Owner / Actions	Success Criteria	Risk Flags
Value mapping	Map current usage to the client's original success criteria / business case	Documented value narrative for the account	No measurable progress against success criteria
Solution fit	Identify gaps between how the client is using the product and best-practice usage	Gap list created with remediation plan	Repeated support tickets on the same root cause
Acceptance	Run structured solution-alignment review (UAT-style validation for key workflows)	Formal sign-off or acceptance recorded	Client withholds acceptance / raises new requirements
Escalation watch	Review open escalations and time-to-resolution trend	No unresolved P1 issues older than SLA	TTR trending upward

6. Day 90 — Steady-State Transition

Objective: formally close onboarding, confirm sustained health, and transition the account into standard success-plan cadence.

Milestone	Owner / Actions	Success Criteria	Risk Flags
Health review	Finalize account health score (usage, CSAT, escalations, sentiment)	Health score documented and shared internally	Health score below threshold at 90 days
Executive review	Conduct 90-day business review with client sponsor	Business review completed; roadmap discussed	Sponsor turnover or disengagement
Handover	Transition account from onboarding cadence to standard quarterly success plan	Standard cadence confirmed with client	Client requests continued high-touch support beyond plan
Growth signal	Flag upsell / expansion opportunities identified during onboarding	Opportunities logged with Account Executive	No expansion signal despite strong adoption

7. Sample Check-in Outreach

30-Day Check-in Email

Subject: Your first 30 days — quick check-in

Hi [Client Name], you're 30 days into onboarding and I wanted to check in on how things are tracking. On our side, [core setup] is complete and we've seen [usage signal]. I'd love 20 minutes this week to walk through early results and make sure we're aligned on next steps. Does [date/time] work?

60-Day Check-in Call — Talking Points

- Recap original success criteria agreed at kickoff
- Walk through usage data vs. baseline
- Surface any gaps between intended and actual usage
- Confirm no open escalations are at risk of breaching SLA
- Agree on any adjustments needed before the 90-day review

8. Escalation & Risk Flags Reference

Any of the following, observed at any stage, should trigger an out-of-cycle review rather than waiting for the next scheduled milestone:

- Two or more missed or unresponsive outreach attempts from the client
- Usage more than 40% below expected baseline at the 30-day mark
- Any P1 issue unresolved beyond agreed SLA
- Executive sponsor departure or reorganization on the client side
- Explicit dissatisfaction expressed in a CSAT response or support interaction

9. Metrics This Playbook Is Designed to Support

- CSAT — sustained through consistent, proactive engagement rather than reactive support
- Customer Acceptance Rate — formal sign-off gates at Day 60 and Day 90
- Time to Resolution (TTR) — early risk flagging prevents escalations from aging
- Net Retention / Expansion — growth signals captured systematically rather than incidentally

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Adapted from onboarding and account-health frameworks applied across a 1,041+ account enterprise SaaS portfolio.