

IMPLEMENTATION / ONBOARDING · PLAN

Standard Implementation Plan Template

A phase-by-phase implementation plan covering kickoff through success handover, with a checklist for each phase.

How to use this: Use this as the master plan for every new customer implementation. Copy it per customer, fill in dates and owners, and check off items as each phase completes.

Implementation Overview

Customer name

Implementation owner

Target go-live date

Customer project lead

Executive sponsor (customer side)

Phase 1: Kickoff

Align on scope, roles, timeline, and success criteria before any work begins.

- ☐ Confirm scope and out-of-scope items in writing
- ☐ Introduce roles on both sides (implementer, project lead, technical contact, sponsor)
- ☐ Agree on target go-live date and key milestones
- ☐ Send kickoff summary to customer within 24 hours

Phase 2: Discovery

Understand the customer's current workflow, data, and requirements.

- ☐ Document current-state workflow and pain points
- ☐ Capture data sources and volumes to be migrated
- ☐ Identify integrations required
- ☐ Produce written requirements summary and get customer sign-off

Phase 3: Configure

Build the environment against the agreed requirements.

- ☐ Set up account/workspace configuration per requirements summary
- ☐ Configure user roles and permissions
- ☐ Document final configuration for handover
- ☐ Internal QA of configuration before migration begins

Phase 4: Migrate

Move customer data into the new environment.

- ☐ Extract and clean source data
- ☐ Run test migration and validate against source
- ☐ Run full migration
- ☐ Confirm data accuracy with customer technical contact

Phase 5: Pilot

Test with a limited group of real users before full rollout.

- ☐ Identify pilot user group and timeframe
- ☐ Collect structured feedback (not just informal comments)
- ☐ Log and resolve or triage pilot issues
- ☐ Make documented go/no-go decision for go-live

Phase 6: Go-Live

Full rollout to all intended users.

- ☐ Confirm all pilot issues are resolved or explicitly accepted
- ☐ Roll out to full user base
- ☐ Monitor first 48-72 hours for issues
- ☐ Send go-live confirmation to customer stakeholders

Phase 7: Success Handover

Transition the account to whoever owns it long-term (account/success owner).

- ☐ Complete handover document (goals, config, open items, key contacts)
- ☐ Introduce customer to ongoing success/account owner
- ☐ Schedule first post-launch check-in (30-day mark)
- ☐ Close out implementation project internally