

IMPLEMENTATION / ONBOARDING · TEMPLATE

Onboarding Scope & Service Description

A one-page, lightweight statement of work that sets expectations for scope, timeline, responsibilities, and success criteria before implementation begins.

How to use this: Complete and share this with the customer before kickoff. Both sides should sign off on it so there's a shared reference point if scope questions come up later.

Overview

Customer name

Plan / package

Target start date

Target completion date

Onboarding owner (vendor side)

What's Included

The specific deliverables covered under standard onboarding.

- ☐ Kickoff and requirements session(s): specify number
- ☐ Standard configuration of core product
- ☐ Data migration up to specified volume/complexity
- ☐ Named integrations set up (list which ones are standard)
- ☐ Training sessions: specify number and format
- ☐ Go-live support window: specify duration

What's Not Included

Explicitly out of scope, to prevent ambiguity later.

Custom integrations beyond the standard list

Data migration beyond the specified volume/complexity

Custom report or workflow building outside standard configuration

Ongoing training beyond the included sessions

Responsibilities

What each side commits to, on the same timeline.

Milestone	Vendor Responsibility	Customer Responsibility	Target Date
Kickoff			
Discovery complete			
Configuration complete			
Data migrated			
Go-live			

Success Criteria

Specific, checkable conditions that define onboarding as complete.

Criterion 1 (e.g. all target users provisioned and logged in)

Criterion 2

Criterion 3

What Happens After Completion

Who owns the account after onboarding ends

How additional/out-of-scope requests will be handled

Date of first post-onboarding check-in

Sign-Off

Vendor representative & date

Customer representative & date
