Let's get you set up

Questions marked * are required.

Completed by _____ Date _____

1 About you

> Five minutes now saves you an afternoon later. Promise.

1. **Your name ***

_____

2. **Company ***

_____

3. **Your role**

_____

4. **What do you want to achieve in your first 90 days? ***

What success looks like by the end of the quarter…

_____

_____

_____

_____

5. **How many people will use it?**

_____

2 Your setup

6. **Which tools does it need to work alongside?**

Tick all that apply.

- ☐ A CRM
- ☐ Email or marketing automation
- ☐ Slack or Teams
- ☐ A spreadsheet or BI tool
- ☐ A project tracker
- ☐ Our own systems, via the API
- ☐ Nothing yet

7. **Do you need help importing or migrating data?**

Tick one.

◯ Yes ◯ No

If you chose “Yes” in question 7.

8. **Where is the data coming from?**

9. **Anything already tripped you up?**

A confusing step, a missing doc, something that didn't behave...

10. **How's your experience so far?**

Circle one.

Lowest (1) (2) (3) (4) (5) Highest

If your answer to question 10 is less than 4.

11. **What's gone wrong?**

The sooner we know, the sooner we can put it right.

12. **How hands-on would you like onboarding to be? ***

Tick one.

◯ Self-serve: just point me at the docs

◯ A kick-off call

◯ Full white-glove setup

If you chose “A kick-off call” or “Full white-glove setup” in question 12.

13. **When are you usually free?**

Thanks, we've got what we need

Your onboarding specialist will follow up with the next step shortly.