Customer Onboarding Conversations for SaaS Implementation Teams

Public workshop · Live online

Wednesday 11 November 2026 · 09:30–14:30 GMT · 4 training hours

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Workshop focus

- Open a customer kick-off
- Check what was promised
- Surface a readiness gap
- Agree owners and next steps

Customer Onboarding

Practical people skills for tech teams

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Workshop overview

Practise the conversations that get a customer started with your product. Open a kick-off, uncover a missing dependency and agree who will do what before the next milestone.

Workshop focus

- Open a customer kick-off
- Check what was promised
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Workshop practice

In a group of up to four, you take turns practising situations agreed during your training needs analysis. A peer or your facilitator gives you feedback on what they saw and heard. You try the difficult part again.

Preparation and follow-up

Before the workshop

For a manager-sponsored place, we first ask your manager what they want the training to help you do. In a short, private training needs analysis (TNA), you tell us about your product or solution, the people you work with and a conversation or task you want to handle better. You and your facilitator agree what the group can use for practice.

Allow 15–20 minutes to prepare the opening you would use with your customer. Identify one expectation to check and one onboarding step that depends on their team.

Bring · Your agreed onboarding brief with a customer goal, one commitment to check and a milestone you can discuss with peers.

After the workshop

Submit your revised kick-off outline and action summary. Choose two changes to try in your next onboarding meeting.

Your individual report comments separately on the written outline and action summary, and on the conversation behaviours observed during workshop practice. It identifies 2 practical priorities for your next customer onboarding conversation.

Workshop agenda

09:30–10:00	**Open your customer kick-off** Give your usual opening to a peer playing your customer. Ask what they expect to be able to do first. Use their answer to restate the goal in their words. **Feedback** · Your customer tells you which part matched their expectations and corrects one detail. Try the opening again.
10:00–10:45	**Recover a missing handover detail** Ask a colleague what the customer was promised before the handover. Then check that understanding with the customer and decide what needs confirming. **Feedback** · An observer identifies the question that uncovered a gap and flags any promise you treated as agreed.
10:45–11:30	**Explain the customer's first task** Talk your customer through one contribution they need to make for your product's onboarding. Ask them to describe how it will happen on their side. **Feedback** · Your customer repeats the task, owner and timing. Refine whichever detail they had to guess.
11:30–12:30	**Lunch break** Optional 10-minute 1-to-1 video check-in with your facilitator to review feedback and focus your afternoon practice.
12:30–13:15	**Find out what is holding up progress** Lead a short readiness conversation from your own brief. Ask what has already happened, what is still needed and who can help the customer take the next step. **Feedback** · The observer quotes the question that revealed the dependency and tells you where ownership was still unclear.
13:15–14:00	**Rehearse the sticking point again** Replay the moment your customer hesitated. Try a different question, explain the effect on their milestone and work out a next step together. **Feedback** · Your customer compares the two attempts and explains which wording made it easier to commit to an action.
14:00–14:30	**Close the meeting and check the handover** Give a one-minute close for your next onboarding meeting. Ask the customer to confirm the actions, owners and next check-in, then capture their corrections. **Feedback** · A peer checks your recap against the agreement and flags any action someone could still interpret two ways.

Free workshop resources

Before your customer kick-off, use the checklist to agree what a successful start looks like and who owns each next step.

- Customer Onboarding Conversations checklist
- Customer Onboarding e-learning
- Browse all checklists