The Customer Onboarding template set provides all the tools you need to effectively onboard new customers to your product or service in a scalable way.
Get the Template Set

Click the link below and the template set will be added to your Sheets folder, you can find it on the left side of the screen under Sheets.

Customer Onboarding Template Set

What’s Included in the Set

With the Customer Onboarding template set, you can quickly help manage and track the customer onboarding experience.

**At Risk Tasks Report**
A running log of at-risk tasks.

**Onboarding Timeline Sheet**
Tracks all of the tasks involved in onboarding customers.

**Customer Tasks this Week Report**
This report tracks tasks from the past seven days and upcoming seven days.

**Customer Onboarding Hub**
A dashboard that summarizes key information about your customer onboarding project.

**REQUIREMENTS:** This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not all premium functionality will be available. Click here to see a list of discontinued plans.
Set Up

Using a workspace is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

Step 1: Create a New Workspace
Open Home. From the home menu, click the Create button in the upper right hand corner. From the drop-down menu, select Workspace. Name the workspace.

Learn more:
Workspaces Overview, Workspace Sharing, Home Tab

Step 2: Drag the Files into Workspace
Select the template set folder under your Sheets folder. Drag and drop the folder down to the workspace you just created.

Learn more:
Manage items in a Workspace (Add, Move, Remove)
Customize

Step 3:

**Setup the Customer Onboarding Hub Dashboard**

The Customer Onboarding Hub dashboard summarizes the key information you want to track when onboarding customers such as important dates, task status, and available resources so you and your team can quickly see the status of the onboarding process. Dashboards consist of different widgets that pull in live information from other sheets and reports.

A. Onboarding Tasks by Status is a *Chart* widget that summarizes tasks by status based on the data in the *Summary* section of the Onboarding Timeline.

B. Onboarding Schedule is a *Metric* widget that summarizes the *Onboarding Initiation Date, Launch Date, Onboarding Duration, and Percent Complete*. All of these data points are automatically updated from the Onboarding Timeline.

C. Key Assets and Onboarding Resources are *Shortcut* widgets to quickly link to your sheets, reports, and other resources outside of Smartsheet.

D. Onboarding Lead and Success Rep are *Image* widgets that you can adjust to display team photos, or change to a customer's logo or other image.

E. Tasks +/- 7 Days and At Risk Tasks are both *Report* widgets that display live reports in the dashboard.

Learn more:

[Dashboard](#), [Widgets](#)
Customer Onboarding
Template Set Getting Started Guide

Step 4:
Modify the Onboarding Timeline Sheet

Use the Onboarding Timeline project sheet to collect, collaborate, and track critical data about your process. The sheet will help automate your customer onboarding process timeline from the start date forward. Since the sheet is set up with dependencies and predecessors it will provide an estimated end date based on onboarding tasks.

A. Double-click on the Onboarding Plan phase name in the child row (light gray) to edit and customize the phases of your customer onboarding process. Use the indented grandchildren (white) rows in your hierarchy, to enter tasks in the Task Name column. Indent subtasks under tasks by using the Indent button on the toolbar, or Ctrl + J on the keyboard.

B. Use the Internal Owner column to assign tasks to team members from your contact list. The contacts assigned in the Customer Owner column will rollup to the two reports in the template set, which are also linked to the Customer Onboarding Hub.

C. Starting on row 10, add the start date and duration for each task to automatically create estimated end dates. The other data on your ancestor and parent rows, including Start Date, End Date, % Complete, and Duration are auto calculated by the tasks below the parent row.

D. Click on the Duration column to set the duration of each task. Set predecessors, or relationships between tasks, in the Predecessors column.

E. Track the progress of your project by viewing the interactive Gantt timeline to see which tasks are complete (green), which are at risk (red), which are in progress (blue), and which are on hold (orange). Conditional formatting rules apply formatting automatically to rows or cells based on the values they contain.

Learn more:
Project Management and Gantt Charts, Hierarchy: Indent or Outdent Rows, Date Column Type, Parent Rollup Functionality, Project Sheet Columns: Start Date, End Date, Duration, % Complete and Predecessors, Predecessors, Contact List, Apply Formatting Automatically with Conditional Formatting Rules
Step 5: **Use the Unique Formulas**

The At Risk flag column is triggered by a formula to automatically flag *Tasks* that have an *End Date* in the past and *do not have a status of Complete*. The formula included is this:

=IF(AND([End Date]10 < TODAY(), NOT(Status10 = "Complete")), 1, 0)

The logic states that if the *End Date* is less than today (in the past) and status is *not Complete* then 1 (flag the row as at risk). If these statements are not true, then 0 (do nothing), and don't flag the row as at risk.

Learn more:
[Formulas and Functions](https://example.com/formulas)

Step 6: **Use the Included Summary Formula**

The table at the top of the Onboarding Timeline sheet consists of summary formulas. Use this data to populate a live chart in your dashboard. The formula used in each cell is:

=COUNTIF(Status8:Status39, "Not Started")

The logic states that if the value in the *Status* column matches *Not Started* then it will count the value. This formula is in each Status field in the summary table. Columns and rows with formulas are locked so that editors cannot change the formulas.

**NOTE:** There are several formulas in the same column, which prevents you from using =COUNTIF(Status:Status, criterion) to count the entire column.

Learn more:
[Formulas and Functions](https://example.com/formulas), [Lock or Unlock Columns and Rows](https://example.com/lockUnlock)
Step 7: **Enable Automations**

An automated workflow is a great way to let your team know they have new tasks to fulfill as soon as they are assigned. There are two alerts setup for this template set — one that notifies customer owners of their new assignments, and one that notifies internal owners of their new tasks.

A. To edit the alert workflows, click on *Automation* and select *Manage Workflows* in the dropdown menu.

B. Then double-click on the workflow to edit its criteria.

Learn more: 
[Notifications: Keep Track of Sheet Changes](#), [Save Time and Work Faster With Automated Workflows](#)

Step 8: **Use Shared Filters on Timeline**

After you assign task owners, the owner can update the status of the task by selecting an option from a custom dropdown list in the Status column. If you have multiple owners, filters are a great way to help people cut through the noise. On the project sheets, we created a shared filter called Tasks Assigned to Me. Anyone viewing the sheet can select that filter to see their assigned items.

A. To modify the options in the dropdown list, double-click on the Status column header and edit the placeholders including the order of the list in the *Values box*.

B. Select the *Filter Off* button in the toolbar to create, use, or modify filters.

Learn more: 
[Dropdown List](#), [Filters](#), [Shared Filter](#)
Step 9: **Sheet Bonus: View or Edit Your Project Summary Data**

For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. The Onboarding Timeline sheet includes a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. Here you can see a quick recap of the status of your tasks and those tasks that are at risk. Open the sheet summary on the right panel to view or edit your project summary fields. You can use formulas and reference another summary fields.

A. Click the sheet summary icon to expand the sheet summary. You can expand and collapse the right panel to stay in the context of your sheet or maximize your sheet real estate when you don’t need to view it.

B. To add fields, click +New Field.

C. Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.

D. To edit the field properties, hover over the right side of the field and click on the vertical ellipsis (⋮) to open the field options dropdown menu.

Learn more: Define Your Work with Sheet Summary, Maximize Your Sheet Summary Usage, Create a Portfolio View with a Summary Report
**Customer Onboarding**

Template Set Getting Started Guide

Step 10: **Monitor the Customer Tasks this Week Report**

The Customer Tasks this Week report tracks tasks from the past seven days and upcoming seven days that are not *Complete* and *have an owner*. This live report is included on the Customer Onboarding Hub, so any changes made will also be reflected there.

A. To adjust the time frame covered on the report, open the Report Builder in the report.

B. Change *When?* to the desired time frame.

Learn more: [Report Builder](#)

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Step 11: **Track at Risk Tasks**

The Onboarding Timeline automatically flags a task as *At Risk* if the status is *not Complete* or *On Hold* and the *End Date* is in the past. The report surfaces all of these tasks in one view, and also pushes them to the Customer Onboarding Hub. The report is not specific to Customers or Internal Owners, but you can adjust this in the report settings.

A. To adjust the report to only display customer tasks at risk, open the Report Builder in the report.

B. Select the *Who?* filter and specify that *Customer Owner is not Blank*.

Learn more: [Report Builder](#)
Step 12: **Customize the Dashboard**

Provide a central location for your team to get status updates on your onboarding process. Easily customize the dashboard to include your onboarding resources by editing Onboarding Resources in the Shortcut widget.

A. Click *Edit*, to start editing the dashboard.

B. Hover over the Onboarding Resources widget and a widget options menu will appear at the bottom right corner.

C. Click *Edit* (pencil icon) to add and remove shortcuts.

D. Repeat these steps for Key Assets - Reference widget.

Learn more:
- Make Changes to an Existing Dashboard,
- Viewing and Sharing a Dashboard,
- Widget Types for Smartsheet Dashboards
Step 13:  
**Share Your Customer Onboarding Template Set**

Sharing is the best way to collaborate with others involved in your projects. You can share your entire workspace with members of your department, or share individual items within the workspace. For more information on sharing and permission levels, check out this [infographic](#).

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**Learn more:**  
[Workspace Sharing](#)

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**FEEDBACK:** Let us know what you think of the Customer Onboarding Template Set! Share your feedback [here](#).