

The onboarding kit I'd send a new customer

Everything a customer sees in their first weeks: the welcome email, the kick-off deck, a shared success plan and the go-live checklist. Written for a made-up pub group, Harbour & Hearth, onboarding 420 staff across 18 pubs onto a staff app.

MADE-UP CUSTOMER · REAL METHOD

1

Welcome email

Sent the day the contract is signed. Sets the tone and books the kick-off.

2

Kick-off deck

Six slides: who's who, why they bought, goals, the plan and how we'll work.

3

Success plan

Goals with a baseline, a target, an owner and a date. Checked every week.

4

Go-live checklist

What has to be true before launch day, and who owns each line.

Why this matters: the first weeks decide whether a customer adopts the product or quietly drifts. A clear plan, named owners and short weekly check-ins keep everyone moving, and they're what customer success inherits after go-live.

Day one: welcome and book the kick-off

To Jo Whitlow, Ops Director, Harbour & Hearth
Cc Lukas (account executive)
Subject **Welcome aboard, and your kick-off on Tuesday 8 Sep**

Hi Jo,

Welcome aboard, it's great to have Harbour & Hearth with us. I'm Valentin, and I'll be your onboarding lead from today until you're live and settled.

Lukas told me what matters most to you: getting your 18 pubs off their WhatsApp groups, making food safety training easy to prove, and helping new starters stick around. That's what we'll build the plan around.

Our kick-off is booked for Tuesday 8 September at 10am (one hour, on Teams). It would be great to have you, Sam from Bristol, and someone from IT or HR who looks after your staff list.

To get a head start, could you send these before the call, if you have them?

- Your staff list: name, role, pub and mobile number (a spreadsheet export is perfect)
- Your current handbook and food safety training documents
- Any dates we should plan around, like refurbishments or busy weeks

Our aim is to go live across all 18 pubs on 3 November. After the call I'll send you a shared plan with every step, owner and date, so you always know where we are.

Any questions before then, just message me on WhatsApp or reply here.

Speak on Tuesday,
Valentin

What it does: shows I already know why they bought, books the kick-off with the right people, and gets the slow items (the staff list) moving before day one.

Six slides, one hour

KICK-OFF · 8 SEPTEMBER 2026

Harbour & Hearth
× your staff app

Getting 420 people across 18 pubs onto one app in eight weeks.

Valentin Dupuy · Onboarding lead

WHO'S WHO

Harbour & Hearth · kick-off

One team for the next eight weeks

Your team

JW

Jo Whitlow

Ops Director · sponsor, signs off decisions

SO

Sam Okafor

GM, Bristol · champion and pilot site

?

IT and HR contacts

to confirm today

Our team

VD

Valentin

Onboarding lead · your main contact

GA

Grace

Support lead · tickets and fees

LK

Lukas

Account executive · contract and pricing

WHAT WE HEARD

Harbour & Hearth · kick-off

Why you chose us

"Every pub runs on its own WhatsApp group, training is on paper, and new starters leave before we've even trained them."

- 18 sites, 420 staff, most of them on their phones, not on a computer
- No easy way to prove food safety training at each site
- Too many new starters leaving in their first weeks

Did we get this right? Anything to add before we set goals?

GOALS

Harbour & Hearth · kick-off

What success looks like

90%

of staff active on the app every week

Measured 30 days after go-live

18/18

sites off their WhatsApp groups

One feed per site and role

100%

of staff with food safety training done

Tracked per site, ready for an EHO visit

We'll write these into a shared success plan and check them every week.

THE PLAN

Harbour & Hearth · kick-off

Eight weeks to go-live on 3 November

WEEK 1

Kick-off and set-up

Staff list, sites, roles and admin access.

WEEKS 2 TO 3

Build

Feeds by site and role, handbook, food safety course.

WEEK 4

Pilot in Bristol

Sam's team goes first. We fix what they find.

WEEKS 5 TO 7

Roll out

Three waves of six pubs, with a champion at each.

3 NOV

Go-live

All 18 sites, then 30 days of close support.

WORKING TOGETHER

Harbour & Hearth · kick-off

What we need from you, and how we'll work

From you

- Staff list (name, role, site, mobile) by 15 Sep
- Handbook and food safety documents
- One champion per pub, named by week 4
- Decisions within two working days

How we'll work

- Weekly 30-minute check-in, Tuesdays at 10am
- WhatsApp for quick questions, email for decisions
- Short videos instead of long PDFs
- One shared plan, updated after every call

Next: I'll send today's recap and the success plan by tomorrow, 5pm.

How I run it: I listen more than I present. Slide 3 is a question, not a statement: if I've misunderstood why they bought, it's the cheapest moment to find out.

Harbour & Hearth success plan

Shared with Jo after the kick-off and checked at every Tuesday call. Status as of week 7.

GOAL	BASELINE	TARGET	BY	OWNER	NOW	HOW WE MEASURE
Staff active every week So messages and training actually reach people	0%	90%	3 Dec	Both	72% At risk	Weekly active staff, per pub, from the app
Pubs off WhatsApp groups One place for rotas and updates	0 of 18	18 of 18	3 Nov	You	11 of 18 On track	GM confirms the group is closed
Food safety training done Ready for any EHO visit	Paper only	100%	3 Dec	Both	48% At risk	Course completions per pub
New starters staying Fewer leavers in the first month	Jo to share	Down by a third	Feb 2027	You	From go-live	HR leavers report, monthly

Milestones

15 SEP	25 SEP	2 OCT	9 TO 23 OCT	3 NOV
Staff list loaded, admins set up	Feeds, handbook and course built	Bristol pilot live	Three waves of six pubs	All 18 pubs live

Risks and what we're doing

RISK	WHAT WE'RE DOING	OWNER
GMs at 6 pubs slow to assign courses	4-minute video on assigning courses sent to every GM; I check those 6 pubs every Thursday	Us
Handbook PDF not opening on some Android phones	Raised with product; handbook added as app pages in the meantime	Us
Weekend staff miss weekday training	Champions run a 10-minute huddle at Saturday briefing	You

Ready for 3 November?

Everything that has to be true before launch day. Reviewed together at the go-live readiness call on 30 October.

ITEM	OWNER	DUE	DONE
ACCOUNTS AND ACCESS			
All 420 staff loaded with role and pub	Both	15 Sep	☐
Admins and GMs can log in and manage their pub	Us	18 Sep	☐
Starters and leavers process agreed with HR	You	25 Sep	☐
CONTENT			
A feed for each pub and role, with the right people in it	Us	25 Sep	☐
Handbook and policies in the app	Both	25 Sep	☐
Food safety course built and tested by Sam	Both	30 Sep	☐
TRAINING AND CHAMPIONS			
One champion named and trained at every pub	You	9 Oct	☐
GM training done (live session or the 4-minute video)	Us	23 Oct	☐
Staff guide: one page and a 60-second video, in every pub	Us	23 Oct	☐
LAUNCH			
Launch message from Jo scheduled for 3 Nov, 9am	You	30 Oct	☐
Date set to close each pub's WhatsApp group	You	30 Oct	☐
Go-live day: I'm on WhatsApp all day, and on site in Bristol	Us	3 Nov	☐
AFTER GO-LIVE			
Daily check of active staff per pub for the first two weeks	Us	3 to 14 Nov	☐
30-day review against the success plan, then handover to customer success	Both	3 Dec	☐