



NEW USER ON-BOARDING CHECKLIST

Action Item	Due Date	Completed
Complete your user profile		
Review the four New User Training Videos		
Explore your S Grow account		
Add yourself as a Test Lead		
Convert your Test Lead Record to Contact & Opportunity Records		
Write down questions that come up or obstacles you encounter		
Schedule a 1-on-1 coaching session with CSM		
Attend 1-on-1 coaching session with CSM		
Submit segmented list to S Grow for import into account		



Our Team's Client Services Manager

Name:

Email:

Phone:

Office Hours: