Northwind Freight × Relay: onboarding kickoff

Fictional sample · Customer onboarding deck and adoption plan

Kickoff call, 12 January · 120 seats across dispatch and finance

Goals, in Northwind's words

From the sales handoff; confirmed by Dana Ortiz (Ops Director, sponsor) at kickoff

1. Dispatch logs all delivery exceptions in Relay instead of the shared spreadsheet
2. Finance receives an automated weekly exceptions report
3. The exceptions spreadsheet is retired by the end of onboarding

Definition of done

Onboarding is complete when all three conditions are true

- 100 of 120 seats activated (as defined in the metric dictionary)
- Exceptions spreadsheet set to read-only, signed off by the customer project lead
- Weekly finance report delivered automatically for 3 consecutive weeks

Milestone plan: setup

One named owner per side on every milestone

MILESTONE	DATE	NORTHWIND / RELAY OWNER	EXIT CRITERION
1. Kickoff, goals confirmed	12 Jan	Dana Ortiz / Sam Lee	Goals signed off in notes
2. SSO and admin setup	16 Jan	Priya Shah / Alex Kim	Admin logs in through SSO
3. TMS integration	23 Jan	Priya Shah / Alex Kim	Test exception syncs end to end
4. Dispatch training (2 sessions)	28 Jan	Marco Ruiz / Sam Lee	Both held; recording shared

Milestone plan: go-live

Spreadsheet retirement depends on milestones 1 to 5

MILESTONE	DATE	NORTHWIND / RELAY OWNER	EXIT CRITERION
5. Finance report configured	30 Jan	Jo Patel / Alex Kim	First automated report received
6. Spreadsheet read-only	13 Feb	Dana Ortiz / Sam Lee	Sponsor confirms in writing
7. Onboarding close review	27 Feb	Dana Ortiz / Sam Lee	Done met, or gaps assigned

Metric dictionary: activation and usage

Same definitions in every review

METRIC	FORMULA	SOURCE
Seats activated	Activated users ÷ licensed seats	Admin console
Weekly active users (WAU)	Distinct users with 1+ exception or report view, last 7 days	Event log
WAU rate	WAU ÷ licensed seats	Derived

Metric dictionary: outcomes

Customer-supplied figures are labelled as such

METRIC	FORMULA	SOURCE
Core action volume	Exceptions logged in Relay per week	Event log
Spreadsheet displacement	Relay ÷ (Relay + spreadsheet) exceptions	Event log + Northwind row count
Time to first value	First automated report date − contract start	CSM milestone log

Adoption review: week ending 6 Feb

Fictional data · formulas from the metric dictionary

METRIC	W/E 30 JAN	W/E 6 FEB
Seats activated	71 / 120 (59%)	94 / 120 (78%)
WAU rate	58 / 120 (48%)	77 / 120 (64%)
Relay exceptions logged	310	402
Spreadsheet exceptions (Northwind count)	140	61
Spreadsheet displacement	69%	87%

What the review tells us

Read-only on 13 Feb looks achievable if activation continues

6

MORE SEATS NEEDED

94 of 100-seat target; 26 seats still inactive

87%

SPREADSHEET DISPLACEMENT

Up from 69% the week before

13 Feb

READ-ONLY MILESTONE

On track, owner Dana Ortiz

Blockers and asks

- Northwind (Marco Ruiz): share the list of the 26 dispatch and finance users not yet activated
- Relay (Sam Lee): follow up with each inactive user and offer a short catch-up session
- Both sponsors: confirm the 13 Feb read-only date or agree a new one now

Next milestone: spreadsheet read-only, 13 Feb

Owners: Dana Ortiz (Northwind) and Sam Lee (Relay)

Next adoption review: week ending 13 Feb · Fictional sample