TELUS Digital

90-DAY CHECKLIST

# Customer activation

## Go from closed-won to long-term value.



## You closed the deal.

## The next 90 days will determine if it sticks.

For B2B companies, concentrated periods of customer acquisition create a predictable challenge. Sales teams close deals in quick succession, often through self-service or low-touch channels, and customer success teams must activate them all simultaneously.

This can strain resources at the best of times, but it becomes even more challenging when new customers are distracted by other priorities, upcoming holidays or the end of a quarter.

Without proactive engagement, these customers become part of an under-managed long tail that never fully activates, placing them at higher risk of churn. According to research from McKinsey & Company, revenue losses from churn can be double the revenue gains from growth strategies, essentially canceling out the value generated by new customer acquisition.

It doesn't matter whether you're activating one account or dozens, with this checklist, you have a repeatable, week-by-week playbook for a positive start.

Ensure your customer success program is set up to generate loyalty by reviewing this activation checklist.

> The sale gets you through the door. The first 90 days decide if you get to stay. Most companies wing it. The best ones have a system.
>
> **— Robin Jakobsen**
> Director, Product Strategy, Sales Services
> TELUS Digital



## About TELUS Digital

TELUS Digital helps B2B companies bridge the gap between closed deals and activated customers through expert-led onboarding, customer success, and lifecycle management services. Learn more about our B2B Sales Outsourcing services.

BUILDING YOUR ACTIVATION SYSTEM

# Proactive preparation

Before you begin activating customers, establish the foundational systems and criteria that will guide each individual onboarding journey. This prep work enables you to execute consistently at scale.

**1. Create your segmentation framework**

- [ ] Define criteria for categorizing customers by size, industry, use case or complexity.
- [ ] Establish guidelines for assigning the right level of touch (high-touch, tech-touch or hybrid).
- [ ] Document how to tailor onboarding intensity based on segment needs and revenue potential.

**2. Define what "activated" means**

- [ ] Align sales, customer success and product on what an activated customer looks like.
- [ ] Identify concrete behaviors that signal a customer is getting value (e.g., active user adoption, key processes implemented, performance milestones achieved).
- [ ] Make activation criteria measurable and time-bound (e.g., within 30 days).

**3. Prepare your tech stack**

- [ ] Ensure your CRM, customer success platform and communication tools are integrated and performing as expected.
- [ ] Set up automated workflows for welcome emails, task assignments and milestone tracking.
- [ ] Build dashboards to monitor activation progress in real time.

**4. Align your teams on handoff protocols**

- [ ] Document the handoff process between sales and customer success with clear ownership and timelines.
- [ ] Conduct internal kickoffs so customer success team members know what was sold, what was promised, and what was discussed but not included (future upsell opportunities).
- [ ] Create a shared source of truth (e.g., account plan, notes document) accessible to all teams.

### Touch models explained

**High-touch:** One-to-one, human-led engagement. Use for high-value or complex accounts.

**Tech-touch:** Automated, self-service engagement. Use for high-volume, less complex segments.

**Hybrid:** Automation and strategic human intervention. Use when key moments (e.g., onboarding, renewals, risk signals) require human engagement.

# Onboarding

The first 30 days after a purchase determine whether customers become advocates or churn risks. Guide them to value, *quickly*.

## Week 1: Launch and engage

**Launch with confidence**

- [ ] Assign dedicated points of contact for high-touch accounts.
- [ ] Send a personalized welcome email within 24 hours (include contacts, timelines, next steps).
- [ ] Schedule a kickoff call to align on goals and success criteria.
- [ ] Establish weekly check-ins for the first month to ensure ongoing alignment and progress.

**Set clear expectations**

- [ ] Share a visual onboarding roadmap of what they can expect to happen, and when.
- [ ] Clarify and communicate responsibilities.

**Prompt the first quick win**

- [ ] Guide the customer to complete at least one high-impact, low-effort action (e.g., onboard key stakeholders, complete a foundational process).
- [ ] Confirm completion with an email or in-app message.

> “
>
> Start by aligning with your customer on what matters most, how you’ll get there together, and how you’ll measure it. Everything else flows from that foundation.



**Tom Pelisson**
Director, Global Customer Strategy and Success
TELUS Digital

## Weeks 2–3: Drive value discovery

**Drive usage**

- [ ] Monitor engagement and adoption signals — flag if the account is showing low activity or participation.
- [ ] Send behavior-based nudges (e.g., a personalized email or an automated notification to indicate that the customer hasn't completed a certain action, and why that action is important).
- [ ] Introduce 1–2 advanced capabilities or services after foundational elements are in place.

**Foster champions**

- [ ] Identify highly engaged stakeholders who demonstrate frequent participation, strong adoption of processes, or proactive collaboration.
- [ ] Provide champions with case studies, use case materials and demo videos — and offer consultation calls to help them answer internal questions and expand adoption.

## Week 4: Review the first milestone

**Measure progress**

- [ ] Review account progress against your predefined activation criteria.
- [ ] Assess whether your customer is on track, at risk, or exceeding expectations.
- [ ] Intervene immediately on at-risk accounts with hands-on support or escalation.

**Document wins**

- [ ] Capture measurable outcomes from account data, taking the time to translate these outcomes into what they mean for your customer's business.
- [ ] Share compelling data and success stories with your customer and the executive sponsor.

**Preview what's next**

- [ ] Send a 30-day progress summary.
- [ ] Preview the next phase, emphasizing that you're dedicated to shared success, not just contract fulfillment.

# Increasing adoption

The onboarding phase should have proved value. The next 30 should build habits. Focus on deepening engagement and removing friction.

## Weeks 5–6: Expand and educate

**Broaden engagement**

- [ ] Introduce 1–2 additional, advanced capabilities, services or processes that align with customer goals.
- [ ] Invite the customer to educational sessions (e.g., webinars, workshops or office hours).

**Personalize the path forward**

- [ ] Use engagement data to recommend next steps tailored to their usage patterns or business priorities.
- [ ] For high-touch accounts, propose a customized roadmap for the next 30 days.
- [ ] For tech-touch accounts, trigger automated recommendations based on behavior.

**Strengthen internal advocacy**

- [ ] Identify who's driving adoption internally and recognize their efforts.
- [ ] Continue to provide champions with data points or talking points to share progress with their leadership.
- [ ] Encourage cross-functional participation, bringing in adjacent teams or departments.



## Weeks 7–8: Check health and optimize

**Conduct a mid-point review**

- [ ] Schedule a check-in (human-led for high-touch, survey-based for tech-touch) to assess progress.
- [ ] Use feedback to adjust your approach for the remainder of the 90-day activation period.

**Address points of friction**

- [ ] Identify and resolve blockers preventing full adoption (e.g., process gaps, resource constraints, unclear expectations).
- [ ] Offer additional support where needed, including training, documentation or hands-on assistance.
- [ ] Flag systemic issues internally so your team can improve the experience for this particular customer, as well as future customers.

**Explore expansion opportunities**

- [ ] If the customer is exceeding expectations, introduce complementary services or capabilities.
- [ ] Frame expansion as a way to accelerate their goals, not as upselling.
- [ ] Document interest and create a plan to revisit post-activation.

### Monitor these leading indicators of long-term success

- **Engagement frequency:** Are touchpoints consistent or becoming infrequent?
- **Breadth of adoption:** How many stakeholders/departments are engaged?
- **Value realization:** Has the customer achieved measurable business outcomes?
- **Executive visibility:** Do decision-makers know about your progress?
- **Sentiment signals:** What is revealed by survey responses, or tone in communications?

# Laying the foundation for loyalty

By day 90, you want the customer to see you as an active partner, not just another vendor. In the last portion of the activation period, document ROI and set the foundation for retention.

## Weeks 9–10: Solidify the relationship

**Conduct a business review**

- [ ] Schedule a formal review meeting with key stakeholders (and the executive sponsor, if possible).
- [ ] Present measurable outcomes achieved in the first 90 days tied to their original goals and their broader business goals.
- [ ] Equip champions with ROI tools, including calculators, templates or summary documents that quantify value and can be shared internally.

**Establish cadence for ongoing communication**

- [ ] Align on preferred communication rhythm, whether that's weekly check-ins, monthly reviews or quarterly business reviews.
- [ ] Clarify escalation paths and points of contact for different purposes.
- [ ] For tech-touch accounts, confirm automated touchpoints are monitored and valued.

**Create a forward-looking success plan**

- [ ] Collaborate with the customer to define goals for the next 6–12 months.
- [ ] Outline how your partnership will support their evolving, overall business priorities.
- [ ] Identify opportunities for expansion or deeper collaboration.

### Document ROI effectively

Start by revisiting the success criteria you aligned on in the beginning. Frame your results around the specific goals you established together, and remember that executives care about business impact.

- **Time savings:** "You wanted to reduce manual processing time. Your team saved 120 hours this quarter."
- **Cost reduction:** "Your goal was operational efficiency — automated processes cut manual work by 40%."
- **Strategic outcomes:** "You needed to expand into new markets and together we've enabled entry into two countries."

## Week 11–12: Graduate to ongoing partnership

**Recognize and engage champions**

- [ ] Make champions aware of referral programs, advisory boards or case study opportunities for when the relationship matures further.
- [ ] Send a personalized thank-you note or small gesture of appreciation to key champions.

**Reassess and refine segmentation**

- [ ] Re-evaluate the customer's account tier based on actual engagement, revenue potential and strategic value.
- [ ] Adjust touch model if necessary (e.g., move a high-performing mid-market account to high-touch).
- [ ] Update health scores and risk indicators based on 90-day performance.

**Hand off to steady-state management**

- [ ] Transition from high-intensity onboarding to an ongoing customer success model.
- [ ] For high-touch accounts, introduce the ongoing CSM (if different from onboarding lead).
- [ ] For tech-touch accounts, ensure automated health monitoring and engagement workflows are active.

**Conduct a retrospective**

- [ ] Review what worked well and what didn't during onboarding (internally and with the customer).
- [ ] Document lessons learned to improve the process for future customers.
- [ ] Share insights with product, sales and operations teams to close feedback loops.


# Request an expert consultation

## Looking to reduce customer churn?

Customer activation is complex and churn is expensive. Book time with our customer success experts to discuss your activation strategy and identify opportunities to accelerate time-to-value and generate loyalty.

**telusdigital.com/contact/sales**

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