

Onboarding Kick-off Preparation Worksheet



Overview and Stakeholders

Business Details

Company name, primary contact.

Business Stakeholder(s) & Roles

E.g. names and position, i.e. Owner.

Pre-Kick-off Prep

Tools/Systems

Describe the tools/platform you currently use.

Access Requirements

Any API connection requests?

Agenda

Goals & Objectives

Outline goals and objectives, what do you want to do in Ringba.

Timeline

Provide milestones you want to achieve.