



Suhas Bhairav

AI Customer Onboarding Plan Creator

Create personalized 90-day onboarding plans from sign-up data using AI.

Automatically generate a tailored, 90-day onboarding checklist for each new customer based on their tech stack.

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suhasbhairav.com

Inputs & Automations

This page defines the data you collect from sign-up and how AI translates it into a personalized onboarding plan. It outlines automation scope, human review touchpoints, and required tools.

Key move Always route high-risk config to a human for final sign-off

PRACTICAL CHECKLIST

- 01** Identify mandatory sign-up fields that feed the AI plan: tech stack, cloud services, deployment method, security requirements.
- 02** Define deterministic rules for routing: when to auto-create tasks vs. require human approval.
- 03** Specify data lineage: where the data lives, who owns it, and how privacy is enforced.
- 04** Choose AI tools and data sources: ChatGPT/Claude, CRM, helpdesk, PM tools, and product telemetry.
- 05** Set privacy and compliance guardrails: data minimization, retention, consent logs.
- 06** Establish measurement: onboarding completion rate, task timeliness, customer NPS signals.
- 07** Define ownership: CSOps owns the workflow; account owners approve changes.

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90-Day Onboarding Blueprint

This page explains how to build the AI-driven 90-day onboarding checklist from sign-up data. It details automation boundaries, data requirements, and practical examples for Customer Success.

Key move Pilot with 2 customers; measure time-to-first-plan impact.

PRACTICAL CHECKLIST

- 01** Auto-generate a 90-day plan based on tech stack: CRM, SSO, cloud providers, monitoring tools.
- 02** Automate task generation for milestones: welcome email, kickoff call, data import, access provisioning.
- 03** Keep human review for security approvals, custom integrations, and pricing reviews.
- 04** Data needed: signup fields, existing customer records, product telemetry, and security policies.
- 05** Tools required: AI agent (Claude or ChatGPT), workflow engine, PM tools, data connectors.
- 06** Adopt in weekly sprints: Week 1 data map, Week 2 prototypes, Week 3 testing, Week 4 pilot.
- 07** Ownership: CSOps owns the workflow; CS managers approve changes; IT ensures access

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Governance & Adoption

Defines guardrails, approvals, metrics, and ownership for sustainable AI onboarding. Provides clear risk controls and accountability across CS, IT, and leadership.

Key move Document changes and rollback plans for every update.

PRACTICAL CHECKLIST

- 01** Automate non-sensitive steps; keep critical decisions around security or pricing human-reviewed.
- 02** Guardrails: data minimization, retention limits, access logs, and audit trails.
- 03** Approvals: require CS leadership sign-off for template changes; tag tasks as approved.
- 04** Metrics: onboarding completion rate, time-to-value, customer satisfaction, and plan adherence.
- 05** Ownership: CS Ops owns automation; Account teams tailor plans per account.
- 06** Risks: data drift, tool failures, scope creep; implement tests and rollback plans.
- 07** Adoption steps: weekly experiments, stakeholder feedback, versioned templates, and retrospective learnings.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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