Onboarding Checklist

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Your complete guide to getting your team up and running with ClearPath.

Before You Begin

This checklist is designed for new ClearPath customers and takes approximately 3-4 weeks to complete. You can move faster or slower based on your team's size and complexity. We recommend following this timeline for best results and maximum adoption.

What you'll need:
• Admin access to your ClearPath workspace
• List of team members with roles
• Existing project data (if migrating)
• 30-60 minutes per week for setup tasks
• Buy-in from team leads

Week 1: Initial Setup

Focus: Get your workspace configured and start exploring

■ **Create your workspace** (Day 1)
• Choose a workspace name (your company or team name)
• Set your timezone and locale
• Upload company logo (appears in navigation and emails)

■ **Invite initial team members** (Day 1-2)
• Go to Settings → Team → Invite
• Start with 3-5 key teammates (you can add more later)
• Assign roles: Admin, Member, or Viewer
• Admins can modify settings; Members can create/edit; Viewers are read-only

■ **Create your first project** (Day 2-3)
• Click 'New Project' from dashboard
• Choose a template or start from scratch
• Create 5-10 sample tasks to get familiar
• Assign tasks to team members
• Add due dates and labels

■ **Explore the interface** (Day 3-5)
• Try Board view, List view, and Calendar view
• Learn keyboard shortcuts (press ? for list)
• Practice creating, updating, and completing tasks
• Explore the mobile app

■ **Watch tutorial videos** (Throughout week)
• Visit help.clearpath.io/videos
• Watch 'Getting Started' series (5 videos, 20 min total)
• Review feature-specific videos as needed

Week 2: Customization

Focus: Tailor ClearPath to match your team's workflow

■ **Set up integrations** (Day 6-8)
• Connect Slack (Settings → Integrations → Slack)
• Set up GitHub integration if your team codes
• Connect Google Drive for file sharing
• Test notifications in each integrated tool

■ **Customize workflow states** (Day 8-9)
• Go to Settings → Workflows
• Modify default states or create custom workflow
• Common states: Backlog, To Do, In Progress, In Review, Done
• Define transition rules if needed

■ **Configure notification preferences** (Day 9-10)
• Settings → Notifications
• Choose which events trigger notifications
• Set quiet hours if desired
• Configure email digest frequency

■ **Create labels and custom fields** (Day 10-12)
• Set up labels for categorization (e.g., 'Bug', 'Feature', 'Design')
• Add custom fields for tracking (e.g., 'Story Points', 'Department')
• Create saved filters for common views

■ **Import existing data** (Day 12-14)
• If migrating, use Settings → Import
• Supports CSV, Jira, Asana, Trello exports
• Map fields from old tool to ClearPath
• Run test import first to verify

Week 3: Team Adoption

Focus: Get your full team onboarded and using ClearPath daily

■ **Schedule team training session** (Day 15)
• 60-minute live demo for your team
• Use our training deck template (available in Resources)
• Cover: creating tasks, updating status, using filters, mobile app
• Record session for those who can't attend

■ **Invite remaining team members** (Day 15-17)
• Add all team members who will use ClearPath
• Send personalized welcome emails
• Assign a few starter tasks to each person

■ **Run your first sprint planning** (Day 17-19)
• Create a sprint (Settings → Sprints → New Sprint)
• Set sprint duration (typically 1-2 weeks)
• Add tasks to the sprint backlog
• Estimate effort using story points or hours

■ **Set up recurring reports** (Day 19-21)
• Go to Reports → Custom Reports
• Create burndown chart for sprint tracking
• Set up velocity report

• Schedule weekly email delivery to stakeholders

■ **Review and refine workflow** (Day 21)
• Gather feedback from team
• Adjust workflow states if needed
• Modify notification settings based on feedback
• Address any blockers or confusion

Week 4: Optimization & Scale

Focus: Fine-tune your setup and explore advanced features

■ **Explore automation rules** (Day 22-24)
• Auto-assign tasks based on labels
• Auto-move tasks when status changes
• Send notifications for high-priority items
• Requires Pro plan ($52/month for advanced automations)

■ **Set up API access** (Day 24-26, Pro/Enterprise only)
• Generate API key in Settings → API
• Review API documentation at docs.clearpath.io/api
• Build custom integrations if needed

■ **Review velocity and cycle time** (Day 26-28)
• Check Reports → Velocity
• Analyze cycle time for completed tasks
• Identify bottlenecks in your workflow
• Use insights to improve processes

■ **Gather team feedback** (Day 28-30)
• Send survey to team members
• What's working well? What needs improvement?
• Address concerns and celebrate wins
• Make final adjustments to setup

Post-Onboarding: Continuous Improvement

After your first month, continue to optimize:
• Review reports weekly to track progress
• Hold monthly retrospectives to discuss ClearPath usage
• Explore new features as they're released
• Consider upgrading to Pro for advanced features like API access, custom reports, and automations

Need Help?

• Help Center: help.clearpath.io
• Email Support: support@clearpath.io
• Community Forum: community.clearpath.io
• Live Chat: Available 9 AM - 6 PM EST in-app