Onboard

The Definitive Guide to Customer Onboarding

Introduction

We’ve been fortunate enough to talk to thousands of companies, each with varying complexity in their onboarding processes. This ranges from having nothing in place to having every inch of the onboarding journey mapped out (with technology supporting each touchpoint, to boot). We built this customer onboarding guide to help you no matter the stage you’re in.

We do know that onboarding is one of the most pivotal moments in the client journey. This is the stage where trust is either made or broken with the customer. They’ve just agreed to spend money on your product or service, after all. Now they need reassurance that they haven’t made a mistake.

In many cases, “bad onboarding” is the leading cause of customer churn. The solution seems simple enough: just make your onboarding process better. How you accomplish that can be an entirely different story. To truly understand what’s causing the negative experience on your customers' side, you need to understand it from their perspective.

Making your onboarding process better doesn’t necessarily mean making it better for your team. At least not immediately. First and foremost you have to focus on the customer's experience.

Once you understand where the breakdowns are occurring within that experience, you can start to correct those issues, while putting process in to help your onboarders. Making the process repeatable and predictable will end customer doubts from the start, setting up a foundation for a long, lasting relationship.

We’ll show you exactly how to do that in this ebook, all while providing you with some practical takeaways.

Content

Defining Customer Onboarding

Strong customer relationships are hardly built on assumptions. Yet, making assumptions about what customers already know, understand, and expect is one of the easiest ways to get off on the wrong foot.

To avoid confusion, it helps to make clear what we're talking about when we talk about "onboarding." One of the most blurred lines we see in the Customer Success (CS) space is the line between Customer Onboarding, Company Onboarding, and User Onboarding.

Let's start off by defining these terms and providing real-world examples of each:

Company Onboarding

Company Onboarding is when your client goes through the configuration, customization, and implementation process step-by-step. Typically, this happens immediately following the sale.

An Example of Company Onboarding: Customer Service Chatbot

A consumer goods eCommerce company purchases Drift's chatbot to improve their customer service efficiency. After the contract is signed, sealed, and delivered, Drift will onboard the new company, including configuring any company settings and integration with their existing helpdesk.

User Onboarding

User Onboarding is when the users of the product (not necessarily those involved in the purchase decision) are trained on how best to leverage your product effectively. Ideally, this begins immediately following or at the end of the Company Onboarding phase.

An Example of User Onboarding: Customer Service Agents

Having taken the eComm company through the Company Onboarding phase, Drift now needs to train the customer's Support Team to use the chatbot to handle customer inquiries. This can be done in many ways—video, train-the-trainer, or webinar.

Customer Onboarding

Customer Onboarding is the combined process of both the Company and User Onboarding phases. It's a term that we use to refer to the broader onboarding phase of each customer relationship, one that can last days, weeks, or even months.

Who You'll Be Working with Each Phase (and Their Mindset)

By and large, these two phases within the customer onboarding process are very different. But they're certainly not mutually exclusive. Here's what we mean.

Typically, when you're onboarding a new company (Company Onboarding), you're dealing with a group of stakeholders who have just made a purchase decision. In the B2B SaaS world, you're usually working with a manager/director or above. In most cases, they (or their managers) have just been sold. Which means:

Egos and job security are on the line.

Stakeholders with a hand in a purchase decision will be very keen on proving that they helped make the right decision for their company (and their bosses).

Buyer's remorse is lurking.

Humans are naturally programmed to have buyer's remorse. At this point, your contacts are very sensitive to any part of onboarding that might signal a bumpy road ahead.

It's a critical point in the customer relationship, sure. Not to worry: an organized, transparent process can make your new customers look like heros.

Contrast and compare that with User Onboarding, where you're likely working with individual contributors that are busy. They have a current process they're used to following. And we all know change management can be the hardest hurdle to overcome. Not to mention, they might have had no say at all in what product or vendor was ultimately purchased.

For this group, especially, it's you, the vendor, that has something to prove. Not to worry, however. Provide demonstrable value by making this group more efficient and you're in.

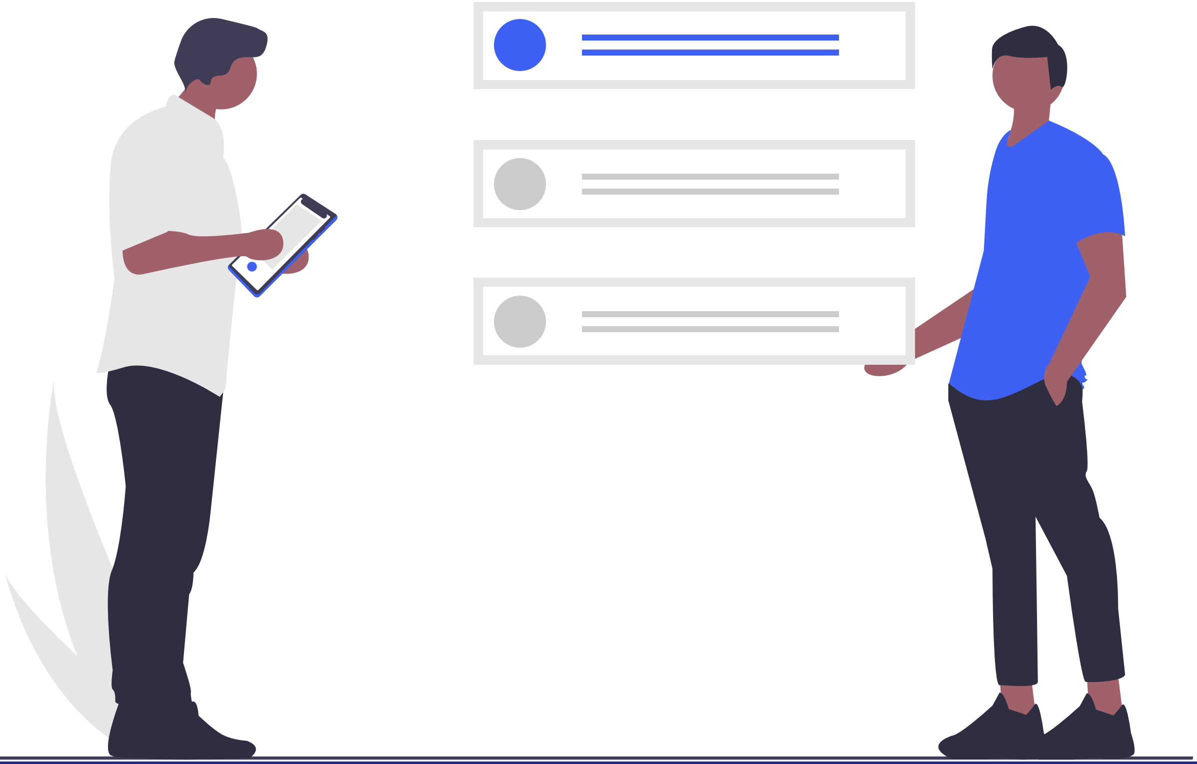
Bringing it Together for Cohesive Onboarding Across the Board

Let's not forget that the people involved in each phase of onboarding are part of the same company. They work together, cross paths, and collaborate. It's no surprise that Company and User Onboarding overlap, despite the clear difference between the two.

If we marry these two processes together under a broader Customer Onboarding model, here's what we can accomplish:

- Gain an understanding of what's important to the Company, Management, and the end user.
- Get the product efficiently configured, customized, and integrated.
- Help the company, management, and users all achieve their goals.

A vendor or service provider that's able to accomplish all of this creates tremendous value for their customers. To get there means not only looking at which side of Company or User Onboarding certain tools or processes fall on, but to understand how each of those tools and processes can work together in the larger idea of Customer Onboarding.



Defining Goals, Objectives, and KPIs

Ultimately, the goal of Customer Success is to meet and exceed the goals of the customer. So how can we set standards for goals, objectives, and KPIs when each customer's goals are subjective?

For starters, we've got to start somewhere! It's kind of like healthy food, exercise, and sleep: they might not guarantee you a spot on the olympic team, but they'll probably get you a lot closer than doing nothing at all.

We know "bad onboarding" is a leading cause of customer churn (onboarding is one of McKinsey's four pillars of "distinctive customer journeys" for a reason). Our contention is that the value of onboarding is actually undercounted, as many companies don't dive deep enough to really understand the reasons behind their churn problem. For example, common churn reasons, such as "Not enough value" or "Low usage," often map back to bad onboarding—a far more layered (and systemic) problem.

Four Core Customer Onboarding Metrics to Focus On

Here are four core customer onboarding metrics that, taken together, can provide an accurate picture of onboarding success across industries, verticals, and businesses.

1. Days to Launch

This important metric considers the number of days between a customer signing up and completing their onboarding. At a fundamental level, completed onboarding usually means the customer has purchased, configured, implemented, and been trained on the product—they have full access and are ready to begin using it.

Date Launched - Onboarding Start Date = Days to Launch

Days to Launch accounts for variability across customers by providing a baseline indicator of how long it's taking to get new customers up and running. Companies that want to go from weeks to days, for example, can keep an eye on Days to Launch as they implement changes to the process.

2. Time to Value (TTV)

We calculate TTV by looking at the time between when a customer signs up to when they first see value from their purchase. While "value" will mean something different for each customer (it could be the efficiency gained by implementing a new booking engine, for example, or deflected support calls in that case of a new chatbot), "meaningful and measurable impact" is a universally applicable definition. The main thing is secure stakeholder alignment around "value" as early in the process as possible to keep ambiguity (and surprises) at a minimum.

3. Satisfaction Survey Results

Again, there are a lot of ways to administer a customer satisfaction survey. We've seen a lot of success with customers who send a survey after the initial onboarding call, then again after the customer is fully launched. Here's how each of those satisfaction surveys might look:

Post-Kickoff Call Survey

- Based on your expectations, how did your onboarding call go?
- What would you have liked to see during the call that you didn't?
- Any additional feedback?

Post-Launch Survey

- Based on the expectations set by your Onboarding Coach, how did your onboarding process go?
- Do you feel your Onboarding Coach was well equipped (with support, ideas/solutions, etc.) to get the program live and have long-term success?
- What would have helped to make your onboarding process better and/or more efficient?
- Any additional feedback?

It's important that these surveys capture both quantitative (composite score, for example) and quantitative (manual customer input) feedback. Both can be highly useful in evaluating the success of your customer onboarding process, while revealing gaps and flashpoints that require closer attention.

4. Onboarder Capacity Measurement

There are myriad ways of measuring team member capacity, many of them quite sophisticated. However, one of the simplest, most effective ways is to do so is to ask your team if they're feeling overwhelmed.

It's all about taking the pulse and having those conversations!

Doing so can quickly reveal a rather narrow range of customers that each team member can feasibly handle. These kinds of qualitative conversations can reveal insights and, really, honesty that more quantitative means might miss.When you do need to quantify this metric, there are a couple of ways to do so, depending on how your business works:

Number of accounts. This method makes sense when your customers' time requirements don't vary drastically. Just take a simple tally for each onboarder.

Number of accounts + size of accounts. If you have Enterprise customers and Startup customers, for example, and the time required to onboard them is much different, you might find each Onboarder can manage five Enterprise accounts and ten Startup customers at any given time. A blanket measurement of all customers, regardless of company size, might not be fair to your onboarding team.

Take The Pulse and Map to the Root Cause of Your Churn

Everybody deals with some degree of churn. Formally defining your own goals, objectives, and KPIs is the first step toward taking the pulse. While those metrics might be variable from company to company, we've laid out the four core metrics above to help you answer a couple important high-level questions:

- Why's it taking so long to get new customers launched?
- Do we actually understand the value we're trying to create (and how long we're taking to create it)?
- Scores and assumptions aside, what do customers actually think about our onboarding process? Do we have blind spots?
- Are we putting our Customer Success people behind the ball?

So many so-called "churn problems" actually map back to a bad onboarding experience. A focus on these four core metrics ought to help you dig a little deeper and make it right by new customers.

Customer Success Team Structure

How you structure your Customer Success team can have immediate and downstream impact. Warning signs of less than optimal structure include workload imbalances, bottlenecks, and flagging Customer Success metrics (time to launch, time to value, and so on). As to finding the right structure, well, the possibilities are many.

Customer Success Roles, Defined

For starters, let's establish just who we're talking about—their titles, roles, and responsibilities—when we talk about Customer Success teams.

- Chief Customer Officer: Executive-level role focused on guiding customer experience vision and strategy and engendering a customer-centric mindset within the C-suite.
- VP or Director of Customer Success: Oversees all post-sale responsibilities; monitors and drives key success metrics, such as retention, churn, lifetime value, and so on.
- Director of Onboarding: Oversees the team responsible for getting new customers up and running as fast and efficiently as possible.
- Onboarding Specialist: Guides customers through a step-by-step onboarding process with the goals of helping them configure, integrate, test, train and go live as soon as possible.
- Customer Success Manager ("CSM"): Brand liaison assigned to help advocate for a specific group of customers and guide them through the customer journey (sometimes includes training and onboarding responsibilities).
- Customer Support Agent: Spends most days troubleshooting and supporting inbound inquiries of varying complexity by phone, email, or chat.

How to Find the Optimal Structure for Your Team

Our philosophy is that team structures change depending on the size of the team, the growing complexity of your product, and your ever changing ideal customer profile. When you have two people on your Customer Success team, usually they are going to be sharing responsibilities when onboarding, supporting, and managing the team's workload. As your team grows, you'll most likely want to begin specializing by role. Similarly as your product becomes more advanced and your ICP changes, focus may shift from reactive support, to higher touch onboarding or more assisted customer management.

The first thing to figure out when thinking about specializing the team structure is the jobs to be done (that is, reactive support, onboarding new customers, proactive success management, continuing customer education, and so on) and the skill set that it will take to get each job done.

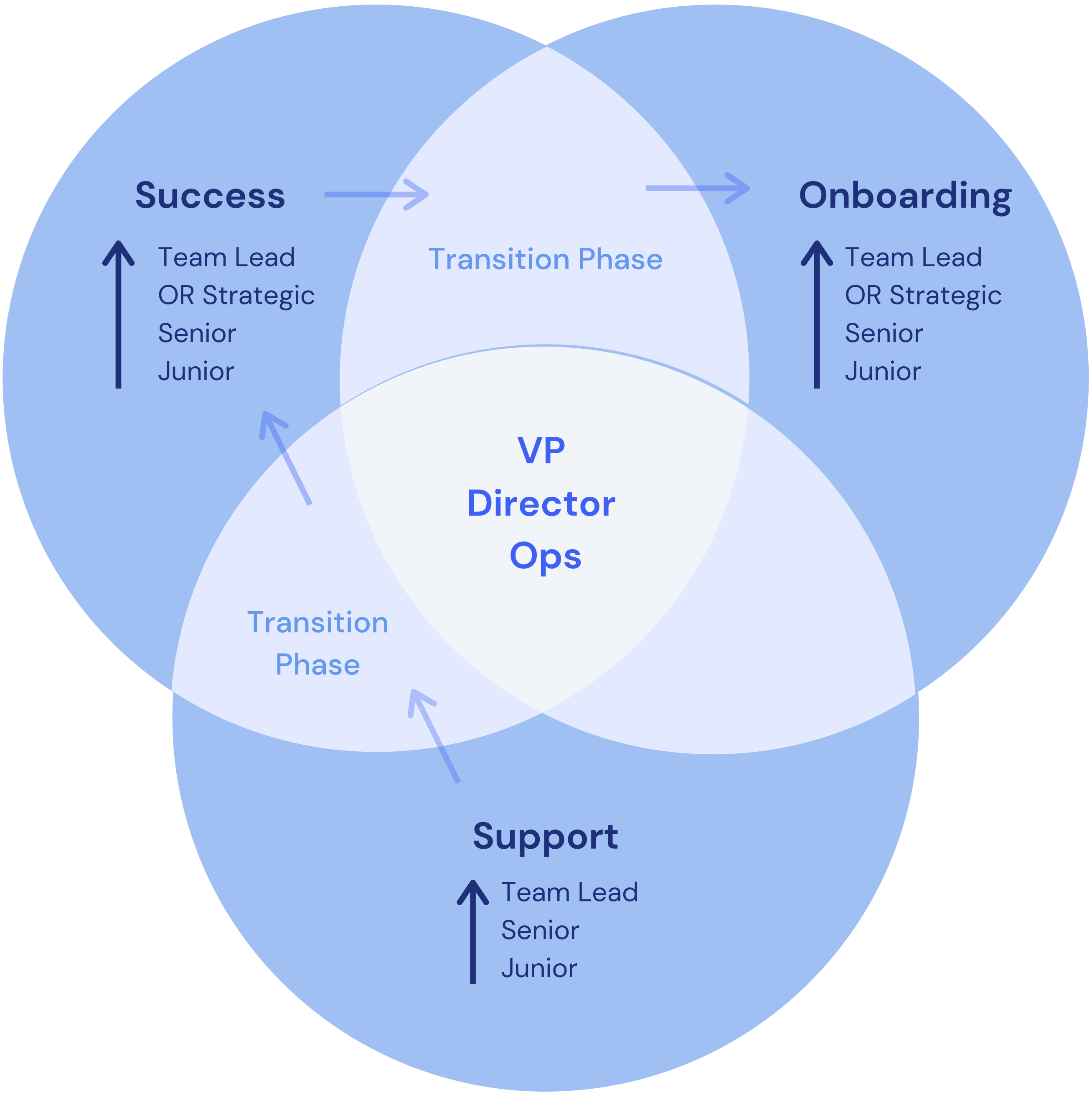
From there, you'll want to bucket those responsibilities into roles and figure out the rank of least specialized to most specialized, for the purpose of laying out career paths. For example:

- Complex product offering: Onboarding Specialist could become the highest skilled. So the path would be Customer Support → CSM → Onboarding Specialist. In this example, when you have a small team, you might consider grouping Support and Success together, while having a different role for Onboarders.

- Simpler product offering: Your CSM will likely become the highest skilled. So the career path is usually Support → Onboarder → CSM. In this example, when you have a smaller team, you might consider grouping Support and Onboarding together, or the Onboarder and CSM role.

As you grow in size, you might start layering in different roles within each group. These might include junior, senior, Strategic, and Team Lead roles, all with varying degrees of specialization.

Customer Success Department Structure



Bottom Line: It’s About Finding the Right Fit for You and Your Customers

The size of your organization, number of customers, and even your product/service offering will all impact how you structure your Customer Success program. At least they ought to! At the end of the day, there are many different combinations that can work—the most important thing is to do what’s best for your customers, while knowing that your future organization will most likely call for a different structure.

Customer Onboarders Toolkit

As pie-in-the-sky as customer experience can sometimes seem, customer onboarding is a practical matter. Get me started, says the customer. Give me the next step, milestones, and metrics, they clamor. Most importantly, when I need it, please provide me with the documentation, self-service help, and just enough assisted support, when I need it.

The customer onboarders tasked with meeting these demands really do live in a tangible world, one with tangible asks and outcomes. As it happens, they rely on a variety of equally practical tools and strategies to do their jobs efficiently.

A toolkit for the tried and tested customer onboarding pro

Into the fray, brave onboarder! To help you with your next customer handoff, here are six must-haves for your toolkit. Each of these recommendations is based on its ability to help onboarders, specifically, be more effective.

1. Calendly Or Hubspot Meetings

As a customer onboarder or customer success manager (CSM), you're very acquainted with your calendar. It's booked solid each day. It's color-coded. And it's being constantly assaulted by meeting requests from colleagues and customers alike.
In most cases, managing it all manually leads to mistakes, missed meetings, and unhappy customers. Scheduling tools such as Calendly or HubSpot Meetings make it easy for customers to schedule time with you. If you're on the fence about this automation, it's likely only a matter of time before making the change becomes a necessity.

Pro Tip

- Keep your calendar updated so you don't get double booked.
- Remember the buffer time setting, which will give you the space you need to prepare for the next meeting.
- Block out "productivity time" on your calendar to give yourself time to catch up on emails, slack notifications, etc.

2. Email plugin for activity logging

There are certain repetitive activities that, when added up daily, comprise a major time drain. Let's say you talk to 20 customers per day and you're logging that activity—those calls or emails—into your customer relationships manager (CRM) manually. That means you're probably spending 20 minutes a day just searching for, then scrolling to "log an activity," for every single contact.
Luckily, there are a variety of email plugins available that can automatically track emails, or log calls from your email, without having to perform a manual CRM search. Salesforce Inbox comes to mind. Cirrus Insight also provides a number of solutions for activity logging.

Pro Tip

- Check to see if your current CRM vendor offers an email plugin for activity logging.
- Use automatic logging and tagging rules for emails.

3. Preparedness plan

If you've ever watched The Office, then you're familiar with Michael Scott's client rolodex. On the back of each card, Scott has compiled do's and don'ts, mentions and don't-mentions. While we don't recommend emulating Mr. Scott's business ethic, we do recommend having a similar customer "preparedness plan."

Your preparedness plan is a checklist of what information you should know going into the first customer call. That is:

4. Handoff Process

Speaking of sales, how's your handoff process? Is it simply "sales" sending a kickoff email, then the CSM team responding to schedule the kickoff call? While this might suffice in the near term, it's not a true handoff process.

Instead, try formally documenting your handoff process. Namely:

- What information should sales capture before the deal closes?
- When does the concept of Onboarding get introduced?
- When does the person responsible for Onboarding get introduced?
- Who will send the kickoff email?
- How will the kickoff call be scheduled?
- How quickly should the kickoff call happen?

Pro Tip

- Create a formalized document that has the approval of relevant stakeholders.
- Make sure to train the entire team (Sales, Customer Success, and Onboarding) on this handoff process. Not once, not twice, but every time there is a new team member joins and quarterly retraining as needed.

5. Kickoff call script

Despite its name, a kickoff call script is more like an internal bulleted list of what you will be covering in the first call. A "call flow," if you will (not an actual script to be read verbatim). It's common for onboarders to create a kickoff call script template that they then tailor for each customer. That said, you can also write a word-for-word script for the "perfect call." From there you can trim it down to the points that you want to gather from each first interaction.

Pro Tip

- A great training method that we've used in the past with new hires is to conduct mock calls with a colleague. Round 1: read the script word for word to reveal the start, middle, and end of the process. Round 2: Go back and tweak the script to verbiage that comes more naturally. Round 3: kill the script and work off of the bulleted list only.

- Use the bulleted list to help prepare an agenda which can be shared with all participants prior to the call. This will help all parties be prepared and keep the call on track.

6. Dashboard

Dashboards are no longer just for managers. Get your team in the habit of using a dashboard to manage their day-to-day activities. The ability to take the pulse of customer onboarding generally, in a single place, is ideal. Onboarding managers, for example, ought to be able to quickly pull up:

- How many customers they're managing
- What stage those customers are in
- How much revenue/ARR/MRR they're managing

Pro Tip

- Build a report for the average number of interactions per day/week/month (% reactive, % proactive).
- Make sure your dashboard is accessible from anywhere, on any device.

Building a repeatable onboarding process

As productive as our onboarder's toolkit might make you—and it will do just that—it all boils down to putting your customers in the best position for success. Churn might happen at the end of the customer journey, but it starts at the beginning with any delay, disorganization, and disinterest that accompany implementation. When customers are successful from the get-go, you and your company will be successful, too. It's the kind of win-win outcomes that most success professionals strive for.

Often, CSM teams and onboarding professionals have their hearts in the right place, but rely on systems and processes that falter the more customers they throw at it. This need for scalability is one of the primary drivers behind Onboard, a solution built to organize, automate, and manage customer onboarding from handoff to launch. Once you've had a chance to review our onboarder's toolkit, we hope you'll check it out.

Putting it All Together: The Ideal Onboarding Process

While we know that your product, customers, or market might mean your company onboarding process is unique, here's a proven framework that we've found to work for most situations.

Phase 1: Introduction & Kickoff

Here's where the first post-sale impressions are made and much of the future success of the engagement is determined. This first phase should consist of the following activities:

Transition Plan

Make sure you have a well-documented Sales-to-Success handoff plan. This should include any information that the Onboarding or Customer Success team might need to kickoff the relationship.

But remember, CS team: any failure by your counterpart in sales to get you all the requisite handoff information isn't an excuse to not have the information when needed. Filter that feedback through the right channels, sure; but go out and hunt that information down. It will only have a positive effect on the customer relationship (and it will keep your reputation squeaky clean).

Welcome Email

No, you don't have to be Hemingway-esque by any stretch of the imagination. But make sure to include a calendar link alongside a brief explanation of the onboarding process they're about to go through. Make it clear who from the customer's side will need to be involved in each phase. Educate, but don't be long-winded. The point is to send an email that makes it as easy as possible for them to interact with you.

Pro Tip

- If your CRM has a plugin for your email service, they likely have an email template feature that allows you to store a Welcome Email template. Spend the time setting this up so you don't have to recreate the wheel for every customer.

Preparedness Plan

A Preparedness Plan is simply a list of items that you prepare before kicking off with a new client. Each company might have different requirements, but here are a few basics that ought to be included:

- Contact
  - Who is your primary point of contact?
  - What is their position?
  - How long have they been with the company?
  - What is their background? Career vet or first job in the industry?
  - Any common connections on LinkedIn? Where did they go to school?
- Business
  - Have you visited the website?
  - How long has the business been around?
  - Size? How many employees? How much revenue?
  - What problem are they solving?
  - Who are their customers? Partners? Competitors?
- Use Case
  - Why did they purchase your product?
  - What is the use case?
  - What is unique about the use case?
  - Is your product mission critical or a nice to have?
  - What features/functionality/results are they most excited about?

Pro Tip

- Knock out your Preparedness Plan for each new customer at the beginning of the day, so you're not scrambling before the call and the information is still fresh in your mind when you get on the call.

Kickoff Call

Now it's time for the first live CS interaction. On the call, we've found it helpful to follow a rough outline, as follows:

- Introduction: Who are you and how will you be helping them.
- Rapport building: Do NOT talk about the weather (please). Let's talk about their company raising money, or a common connection (i.e., a person or school or hometown). Show your professional personality a little bit here. Schmooze it up a bit. Always make sure to ask if we're waiting on anyone else.
- Agenda: Set the agenda at the outset, in no uncertain terms. Let them know where they are in the onboarding process, what we're doing today, and where they're going. The visual approach works great here. Example:

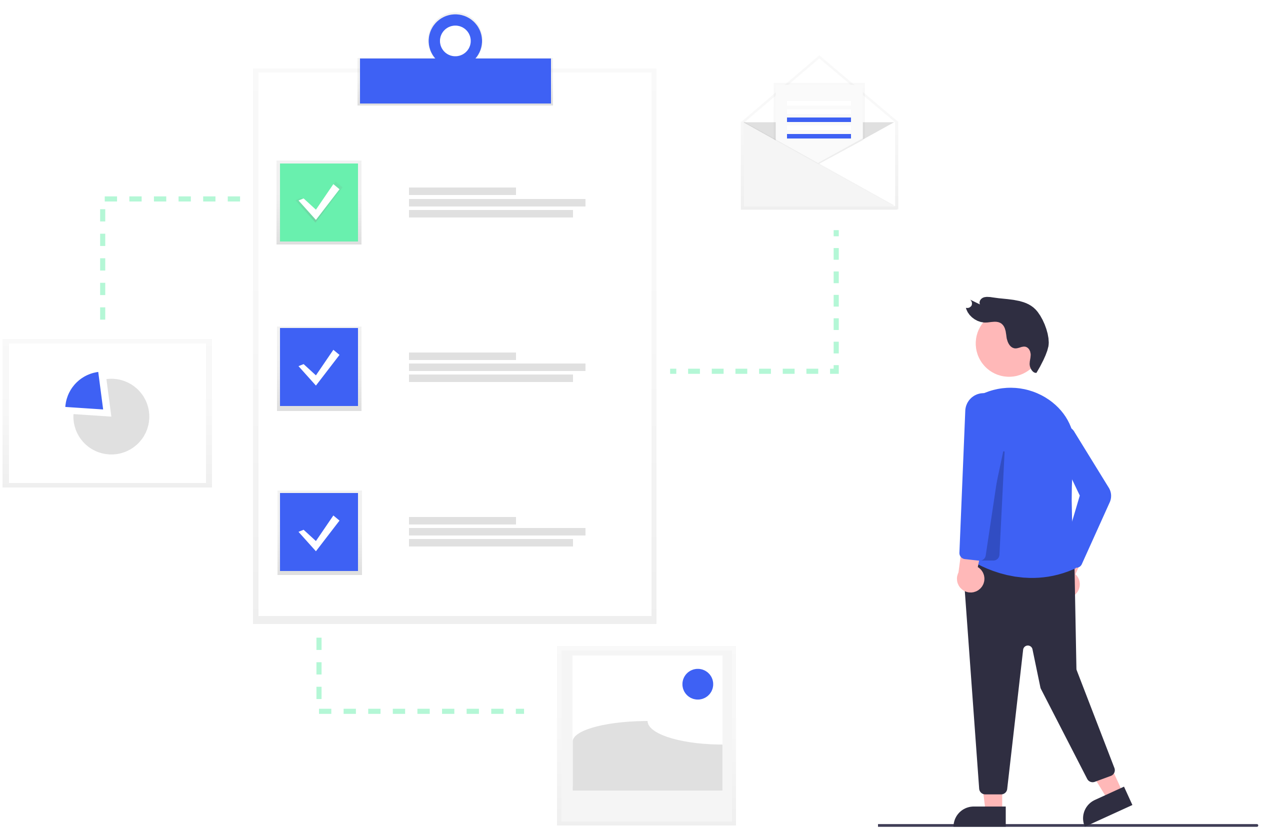
- Dive-In: Now it's time to get into the thick of things. Again, this should be educational, but easy to follow. Our job in this phase is to be a tour guide, not a trainer—especially if your onboarding process lasts longer than a few days. If you train them on this call and they don't go live for 30 days, they won't remember anything they were trained on.

We define a great tour guide as someone who gathers information upfront, reviews the information, marries that with the knowledge they have, and then provides an amazing experience that satisfies the people paying for the tour.

Another primary goal of the kickoff call is to gain alignment across your customer and yourself. Confirm information that you understand to be true and tease out information that ensures you're aligned.

Post Kickoff Survey

We're big fans of sending a post-kickoff survey. This will oftentimes tell you if sales has set the right expectations and if the onboarder has delivered on those expectations. For a list of questions you might include in this survey, see section 3 of "Defining Goals, Objectives, and KPIs" in this guide.



Phase 2: Configuration

Depending on the complexity of your product, you might be able to cover the Kickoff and Configuration phases on the same call. If that's possible, and your audiences are the same in both phases, this can cut down on the time it takes to launch.

However, coupling phase 1 and phase 2 in this way is more of an art than a science (and not without pitfalls). If you find that your kickoff calls are scheduled for 45 minutes and they're taking an hour and 15 minutes, you're trying to fit too much in. If you're walking away with more questions than answers the majority of the time, you need to split these phases apart.

That said, if you need to split them, try to put them as close together as possible. We've seen companies stack these calls one day apart, or even on the same day, which tends to lead to better outcomes.

Again, we're going to start this configuration call off the same way:

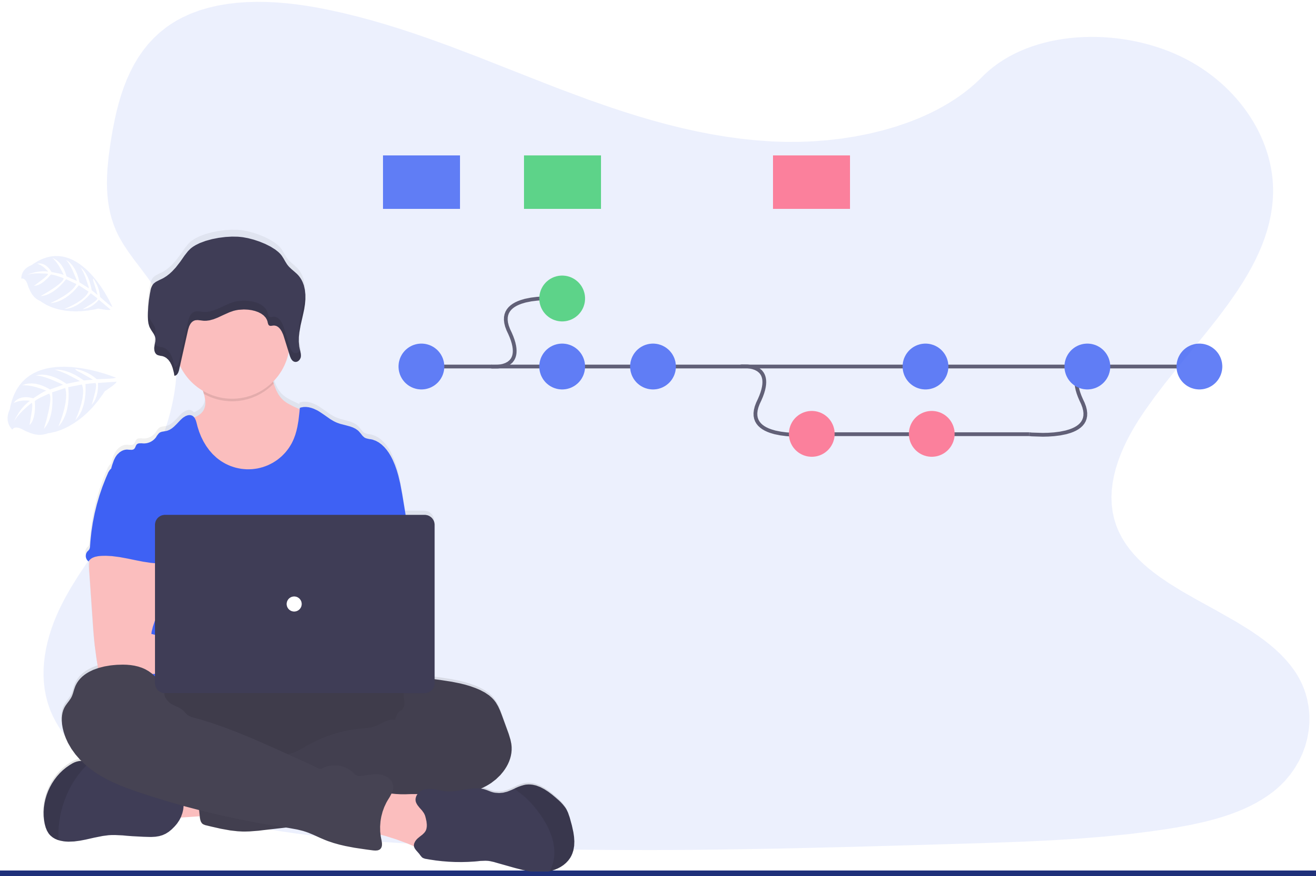
- Are we prepared for the call?
- Are the right people invited to this call?
- Introduction
- Rapport building
- Agenda (show the visual)
- Dive-In

Phase 3: Integration

We define this phase as a “technical integration.” So if your integrations are more focused on configuration, you can probably get away with adding them to the preceding Configuration Phase. However, if there is real engineering work that goes into your integrations, this is going to be a necessary—and standalone—phase.

That said, we’re not deviating from the same fundamental agenda:

- Are we prepared for the call?
- Are the right people invited to this call?
- Introduction
- Rapport building
- Agenda (show the visual)
- Dive-In



Phase 4: Testing & Go-Live

The last phase is where we button up any final tweaks or changes before drawing a line in the sand and saying "we're live." That said, there might be follow-up activities that you need to do, such as team training, train-the-trainer, weekly monitoring, and check-ins (until a certain metric is hit). But the must-do's in this phase are:

- Test everything that you've setup thus far, down to product notifications and error messages.
- Ensure that everyone who is going to use your product is either trained or has a clear path to training.
- Congratulate your client on going live. This should be a big deal! They purchase your product, they went through your process, and they're ready to use your product (for a long time)!
- Always send a Post Launch Survey. It's imperative to know how your client felt about the onboarding process. The earlier we can identify issues, the longer we have to solve them and it also prevents other customers from encountering the same issues. Include questions about the onboarding process, the onboarding coach's preparedness, and suggestions to improve the process overall. For a list of questions you might include in this survey, see section 3 of "Defining Goals, Objectives, and KPIs" in this guide.

Pro Tips:

Generally speaking, you'll avoid many headaches by requiring the sales team to provide the information you need for your handoff process throughout the sales cycle. Depending on what CRM your team uses, most likely you'll be able to require certain information at each sales stage. Use this feature to ensure your CS team doesn't have to chase down basic information at handoff.

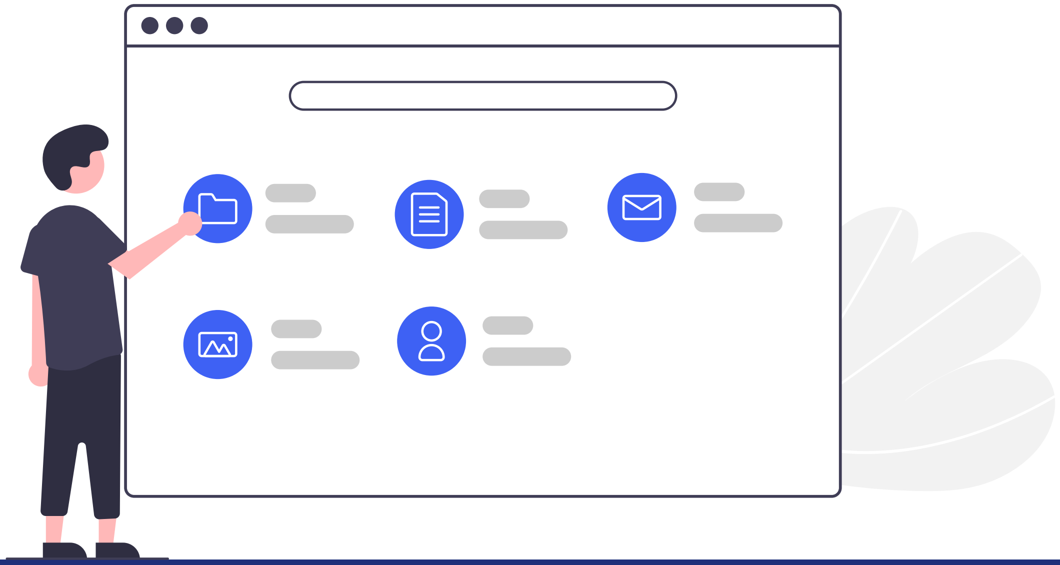
Additional Resources

Customer Onboarding Strategy

7 Ways to Elevate Your Customer Onboarding Experience

Customer Success (CX)

6 C's for Customer Success and Onboarding Managers



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