STRIKEDECK

21 ONBOARDING

EMAIL TEMPLATES

Onboarding Customers

Customer onboarding is a structured, standardized method of teaching new customers about your product or service, with the goal of decreasing TTFV, time to first value.

Effective customer onboarding increases customer ease with your product, and brings them up to speed so that they can start experiencing the positive benefits of using your offering. The purpose of onboarding is to increase customer profitability in a measurable way.

Streamlined, focused customer onboarding is essential if you want to retain your customers. Repeat customers are an incredibly valuable asset to your business, especially since 80% of a company's future revenue can come from 20% of existing customers (Gartner).

If customers are thrilled with the service you give them, they will refer you to other leads via word-of-mouth marketing. These email templates will help engage your new customers, and start your relationship off on the right foot. Remember, diagrams, videos, and help docs go a long way!

Happy Onboarding!

> Most SaaS products' onboarding practices miss a crucial step: creating value for the user in the first session.
>
> – Tomasz Tunguz, Venture Capitalist @ Redpoint

#1

Subject: Welcome! Here are your free guides

Hi there!

I'm John Doe. In this first message, I want to tell you 3 things.

Thing #1
You'll be hearing from me every Monday and Thursday.
Each week, I will send you new developments in…

Thing #2
You are a valued member of our small community. Welcome to the team! It's great to have you here. Our members are focused on…and helping you do the same.

Thing #3
Here is a link to our popular guides, How to…

Thanks for reading. We look forward to hearing from you!

John Doe

P.S. Looking for more? Click *here* to see our popular blog articles.

#2

Subject: Thanks for joining ABC!

Hi Chris,

Welcome to ABC! We're so excited for the opportunity to work with you and your team.

I'm John, the Co-founder and CEO of ABC. Thank you for signing up! At ABC, you'll find the best project planner and status report builder. A good place to begin is the Best Project Templates resource, where you'll find some of my favorite templates.

Can't find what you're looking for? Ask us, and we'll find something that meets your needs, or create a new template from scratch. Reply to this email with any questions, and we'll be happy to help.

We're thrilled to have you as a part of the ABC family!

Stay awesome!

John Doe

- -

#3

Subject: Team Members → Higher Collaboration → Accelerated Growth

Dear Chris,

Adding a team member or two (or a dozen!) to your ABC account increases collaboration, information exchange, new product feature usage, and operations strategies.

B3B, a telecom company in California, saw a huge boost in their productivity, project implementation, and sales once the entire team started using ABC.

Check our B3B case study, and add a team member to your ABC account to see how it facilitates efficient & effective business processes.
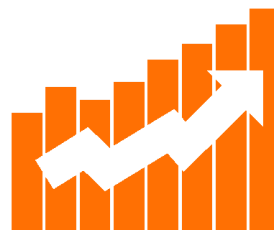
Download the B3B Case Study

Adding a new user is completed in 3 easy steps:
First login to your account - **Settings >> Users >> Invite Users**

Stay Awesome!

John Doe

#4

Subject: Welcome to ABC!

Hi Ana,

I saw that you recently signed up for a ABC trial; thank you for giving our product a test drive!

You'll get another email from us full of resources to help you get the most out of ABC - keep an eye out for that. In the meantime, all of our Customer Success and Support materials are available here.

You can also reach our Support team with any questions at support@abc.com.

Cheers,

John Doe

— —

#5

Subject: Would you like some help getting started with ABC?

Hello Chris,

Thank you for registering for an ABC account. As a new user, you are now able to access a wide range of backlink data. We would like to help you get started by offering you a free one-on-one walkthrough of our site, and the full suite of tools available for your use.

Many have found this session essential for learning key tips & tricks, as well as highlighting the key features of ABC. Once you have completed this short walkthrough, you'll get a free month of our upgraded package offering.

These walkthroughs usually last between 30 - 45 minutes, with plenty of time for questions you or your team may have. To book an appointment, please reply to this email and let us know which timezone you are working in, and some dates and times you are available. You can also email sales@abc.com to book a time with our Support team.

Once again, thank you for choosing ABC.

Kind regards,

John Doe

#6

Get quick, guided setup training - on your schedule.

Welcome to ABC!

Every week, we host free, live, online training sessions for our new customers. You'll get an introduction to ABC's primary SEO, social media, metrics, and reporting tools - and have your questions answered in real time. We have a variety of class times to accommodate you.

Sign Up for a Free Class

We look forward to seeing you in a session soon!

John Doe
XYZ Job
help@abc.com

P.S. Can't attend a live session? Sign up anyways, and we'll send you a recording afterwards.

Subject: A Note from ABC

Hello Emma!

We noticed that you haven't tracked any activities with ABC yet. Need a little help getting started?

Check out our simple tips for how to track an activity below, or get started today on [Abc.com](Abc.com).

ABC Activity Tracking -

- ➢ **Step 1**: Click 'Post New Activity'
- ➢ **Step 2**: Choose your Activity/Equipment Type
- ➢ **Step 3**: Add a map (optional)
- ➢ **Step 4**: Enter your activity data and save

RunKeeper App Activity Tracking -

- ➢ **Step 1**: Select manual or GPS tracking from the 'Input Type' options
- ➢ **Step 2**: Select your 'Activity type' and 'Coaching' (optional)
- ➢ **Step 3**: Start, stop, and save your activity

When you save activity, your workout will be automatically synced with your account on [Abc.com](Abc.com).

Track an Activity

It's up to you to get moving! Happy Tracking!

Best,

John Doe

#8

Subject: A Little Reminder

Hey Chris,

Since you have enabled automatic batch delivery, this email is a reminder to add photos to your ABC account. If you add photos now, we'll automatically print them on **Wednesday, May 18, 2016.**

Otherwise, we will delay the printing by a week.

<p align="center">Upload Photos or Edit Recipients</p>

Want to **disable automatic batch delivery?** Click Here

To send this batch now, login and click Send Now. If you would like to postpone delivery, hover over the date on the blue bar, and select the new print date. Happy Printing!

Best,

Josh Doe

- -

#9

Subject: You haven't installed ABC yet!

Hi Chris,

We noticed that you signed up for ABC a while ago, but never installed the software.

Installing ABC lets you:

➢ Easily save files to ABC
➢ Get to your files from any computer or phone
➢ Share photos or docs straight from your desktop

<p align="center">Download ABC</p>

If you need a refresher, check out our tour. Enjoy!

The ABC Team

#10

Hello Chris,

It appears that you haven't been around the nest much. Is there anything we can do to get you started?

All of the owls here at ABC Headquarters are rooting for your success, and are here to help anytime.

Let's keep it simple and start with the first step, adding a social network account to your profile.

To **add a social network** account:

- ➢ Select your **User Profile** from the **Launch Bar** on the left
- ➢ Under **My Social Networks,** select **Add a Social Network**
- ➢ Select the **social network**, and click **Connect**

Cheers,

John Doe

Subject: Let's Get Started!

Hi Andrew,

It looks like you're ready to get started with **ABC.** Use our 3 step guide below to get your account up & running in minutes. If you get stuck, chat with one of our team members.

Copy your unique **ABC** code using the link below, and paste it into your website. We've made Quick Guides for the most popular CMS and shopping carts, like Wordpress, Joomla, & Shopify.

1. Get the ABC Code

Don't see yours listed? Try the basic HTML Guide. We work well with CRMs as well. Still need help? Hop on our live chat or just reply to this email.

2. Check your website

After you copy and paste the code into your website, refresh your browser. You should see your **ABC** chat box appear in the bottom right corner of your website.

3. Start Chatting

Use the **ABC** console to chat with your website's visitors within your own web browser. **ABC** also works with other chat programs. We recommend using Pidgin for Windows, Adium for Mac, or imo.im on your mobile phone. View a full list of IM clients here.

That's it!

Go out there and start making us proud! We've pooled together some helpful tips to make sure you're able to hit the ground running. Don't forget to customize your chat box! Finally, if you're part of team, add some operators, so everyone can get onboard.

Welcome aboard, it's great to have you!

Team ABC

#12   Subject: 4 Tips for Mailing into ABC

You successfully sent an email to ABC!

Make emailing ABC even more useful by sending emails straight to a notebook, automatically setting reminders, and adding your correspondence to a calendar log.

Here's how it works:

- ➢ Edit the email subject to change your note title
- ➢ Add ![date] to set a reminder on the note
- ➢ Add @[notebook] to send it to a specific notebook
- ➢ Add #[tag] to organize the note with a tag

For example, to forward boarding passes to your account, file it in your 'Travel' notebook, add an 'itinerary tag', and set a reminder to check into your flight - do this:

> Add this subject:
> > Email subject: Boarding Passes !2014/11/30 @Travel #itinerary

Try it with your own flight confirmation, a receipt, or anything else that you want to set aside from your endless inbox!

- The ABC Team

- -

#13   Subject: Get Started with 3 Simple Tasks

Welcome to the team! We're here to help as you get up to speed. Start by creating a few tasks.

1. Add a task for something that you need to finish today
Create a task and set today's date as the due date. You can even get a unicorn to celebrate with you when you mark it complete.

2. Assign a task to the teammate who invited you to ABC
Assign a task to request information that you might need, ask a question, or get help with a simple to-do.

3. Add a task for something you need to do with a teammate
Assign this task to yourself. Add your teammate as follower so they can see your progress and know when it's completed.

Add a Task

#14 Subject: Team us up with other companies!

ABC **plays nicely with the other tools you use.**
Check out some of our most popular integrations.

Hook Us Up

See more than just meetings in Sunrise.
Know what's going on each day with your ABC tasks alongside appointments & meetings in Strikedeck.

Chat about it in Slack.
Get updates in a Slack channel when tasks are created, commented on, and completed.

Add files from Dropbox into your task.
Keep files and tasks to stay organized. Upload attachments from Dropbox without leaving ABC.

- Team ABC

- -

#15 Subject: Get Free Advice

Get free advice on how TechAdvice can optimize your marketing channels.

At ABC, our mission is to help companies move away from disruptive marketing tactics. That's why we're offering free marketing assessments - to show you how to do marketing the inbound way.

As part of your assessment, one of ABC's Marketing Specialists will evaluate your current website and show you how you can get more traffic and leads from your website. He or she will review your:

- ➢ Search engine optimization opportunities
- ➢ Landing pages & lead-gen forms
- ➢ Blog and website content
- ➢ Social media profiles
- ➢ Competitor analysis

We look forward to advising you! Sign Up today!

- Team ABC

Subject: Complete your ABC registration!

Just one more step, and you can listen to an endless stream of free music, attuned to your tastes.

Finish signing up

If the button does not work, copy and paste this link into your browser:
http://www.abc.com/account/register/xxx

Need help? Visit here or email us at help@abc.com.

- -

Subject: Welcome!

Hi Anna,

It's not everyday that you sign up for a new service. That's why I want to make sure everything is in place for you to feel welcome and at home. Please feel free to contact us at hello@abc.com or tweet us @abc.

I hope you have already have a handle on using ABC. If there is one tip I can share with you, it would be to install the browser extension. It's a terrific way to amaze your friends and followers with any content you find on the web. Simply click the ABC icon in your browser whenever you find something you want to share!

One last thing - The whole team is always around, 24/7, to reply to your emails. In fact, you can just hit reply to this email or any others you receive from us. Whether you need help, have ideas, or just want to say "hello", we'll get back to you within a few hours.

P.S. In case you also want to connect with me personally, just tweet me anytime @JohnDoe.

Best,

The ABC Team

Subject: Thanks for signing up for ABC!

#18

Hi Chris,

By signing up, you've taken the first step towards a stress-free life, more sleep, and better focus. We'll be popping in now and again to help make sure you're getting the most from ABC. Please reply to this email if there is anything we can do to make your experience better.

- -

Subject: ABC Tip #2

#19

Easily create and share content with friends via ABC.

Creating and sharing files is easier than ever with ABC. Create content with Box Notes for your daily to-do list, drafts for blog posts, notes from meetings, and more, all while collaborating in real time with friends and colleagues. Add collaborators to a folder to share everything inside, or simply send them a link for secure sharing of individual files & folders. However you do it, ABC gets better the more you share.

Learn how to Add Collaborators or Share Something

- -

Subject: Renewal Notification

#20

Dear Andy,

Your ABC Premium Membership expires this month, and will be renewed for a term of 12 months at $49.95. Please review the information below to make sure your subscription is not interrupted.

CREDIT CARD TYPE: Debit
CREDIT CARD NUMBER: **** - **** - **** - ####

If your payment information has changed since your last order, your membership may not be processed. To update your payment information, please visit Customer Care.

We appreciate your business! Contact a human directly, here.

- **The ABC Team**

If you have questions about your membership, please visit our FAQs.
To manage your membership online, visit Customer Care.

#21

Subject: Create Your First Mailbox

Hey Chris,

John here, from ABC. To make the most of your new ABC account, the first thing you should do is create a mailbox.

- Login here to create your first mailbox
- Check out our written tutorial here.

If you need a little help getting your mailbox set up, no problem! Please contact us, and our support team will guide you through the process.

- Email: support@abchq.com
- Phone: [(123)-456-7890](tel:1234567890)

Or, simply reply to this email and let me know how I can help. You'll be a delighted customer in no time. I'll also get to prove to you that I'm not a robot :-)

Cheers,

John
ABC, XYZ Job