



The three biggest mistakes
in customer onboarding.
And how to avoid them.

TABLE OF CONTENTS

The three biggest mistakes in customer onboarding. And how to avoid them.

Customer Onboarding is No Trend	3
What is Customer Onboarding?	4
Mistake #1	5
Mistake #2	7
Mistake #3	9
Conclusion	11
How TaskRay Can Help.....	12
About TaskRay	13
About the Author.....	13

INTRODUCTION

Customer onboarding is no trend.

Many practices that were once viewed as luxuries are now accepted as business critical—think “marketing automation”, “CRM”, “CPQ”, and “Customer Success Management”. Customer onboarding is no different, and we would argue that it’s quite possibly the most important piece of the puzzle when it comes to:

- ▶ Solidifying customer relationships.
- ▶ Feeding your marketing and sales funnel with referrals, AKA the highest quality leads possible.
- ▶ Gaining a competitive advantage.
- ▶ Building a best-in-class brand.
- ▶ Growing your business.

After all, in business as in life, first impressions matter.

“

*There are two causes of churn that occur more frequently than any others... loss of the champion who drove the purchase and **failure to successfully onboard the customer.***

DAVID SKOK



INTRODUCTION

What is customer onboarding?

Simply put, customer (or client) onboarding is defined as the time from when a deal is closed to the time a customer derives value from your product or service. According to Zuora, "there's no such thing as too early for starting to define a Customer Success model—in fact, it's smart to think about it as soon as you do a customer acquisition model. This may start as: 'How do we do great customer onboarding, promote adoption, and deliver value in the first 30-60-90 days?' and then scale into a full-blown Customer Success program over time."

CUSTOMER ONBOARDING PROCESS



Want to get customer onboarding right? Read on to learn how to avoid the three biggest mistakes companies make when it comes to customer onboarding.

MISTAKE #1

Not placing value on customer onboarding as it relates to customer satisfaction and retention.

TASKRAY



of companies believe they're delivering a superior experience to their customers



● 8%
of customers agree*

As the first step of the post-sale customer experience, getting onboarding right is critical. Because it's at this point that your relationship with a client is at its most fragile. Why? They may have built a relationship with your company through your marketing communications or with your sales team, but now they need to build a new one. And fast.

As products and services commodify in terms of features and price, the cost of switching has never been lower. Which means people are making their choices about what to buy and whether stay loyal based on their overall experience of being your customer. Customer onboarding is the first chance to build loyalty.

While many companies understand, or at least give lip service to, the importance of customer onboarding, it is in fact an area that is too often neglected or dealt with reactively after something bad happens.

If you don't have a solid onboarding team and process in place, your customer relationships are at risk. **To put it bluntly, if you blow it in onboarding, you most likely won't get a second chance.**

**Bain & Company*

HOW TO AVOID MISTAKE #1

Obtain leadership support early and often.



Money talks. When approaching leadership for support, use terms like time-to-value and ROI.

If you want to deliver the kind of onboarding experience that is crucial to retaining a customer in this day and age, it's imperative to have leadership support.

To gain support, focus your pitch on what leadership cares about. Usually, that means ROI and the bottom line. It's also critical to get buy-in for your customer onboarding program from the beginning and to make sure you're continually providing updates and addressing any concerns if and when they come up.

Here are some stats to support your case for building a strong onboarding program:

Customer experience will overtake product and price as the key brand differentiator by 2020. [WALKER]

Bad experiences echo more loudly in the age of social media. 95% of consumers share bad experiences with other people.

[ZENDESK]

Customer experience is directly tied to customer retention.

A member who rates as having the poorest experience has a 43% chance of being a member a year later. A member who gives one of the top two experience scores has a 74% chance of remaining a member for at least another year.

[TASKRAY]

Bad experiences can cost new sales. 60% of B2B tech buyers read product reviews before making a purchase. [GOOGLE]

Happy customers spend more. Even after controlling for other factors, customers who rated their experiences as mostly high spend 140% more than those who rate them as mostly poor.

[HARVARD BUSINESS REVIEW]

Disloyalty is costly. Acquiring a new customer costs six to seven times more to than retaining an existing one. [BAIN & COMPANY]

MISTAKE #2

Not being able to scale onboarding process.

As you acquire more clients or add product or service lines—essential to the health and growth of any company—ask yourself this: can you keep up with the increased load while also maintaining a high level of customer satisfaction?

Your team might be able to get by for a while with an “OK” onboarding process and a “good enough” tool in place. But, If you haven't documented your process or if you're using a mix of tools across disparate systems—email, chat, spreadsheets, Google Suite, CRM, etc.,—you know how this approach can lead to missed deadlines, dropped balls, redundancies, delays, and poor customer satisfaction ratings.

Worse? If you can't keep up, think about all the missed opportunities for new business.

Being able to scale is directly related to your onboarding process and tools. While most companies have invested in marketing tools, sales tools and customer success tools, many treat what they'll use for customer onboarding as an afterthought. **This is a mistake because without a strong tool, it will be next to impossible to scale your onboarding process, i.e. grow your business.**

HOW TO AVOID MISTAKE #2

Get the right onboarding tool in place.



A solid customer onboarding tool is directly tied to a company's ability to scale their business.

Before you start looking for an onboarding solution, know this: garbage in, garbage out. Seems obvious, but if you don't have a good process to begin with, no tool is going to save you. So, take a little time to get with your team to figure out and/or document your process. Once you have that down, use this criteria to evaluate onboarding tools:

Does it help you easily repeat your onboarding process? To scale your process, you need a tool with templates. Templates enable you to repeat processes which saves time and allows your team to focus on delivering an excellent customer experience, rather than figuring out everything from scratch each time. Ultimately, this will result in being able to handle more customers without jeopardizing customer experience, i.e. scale.

How well does it automate processes? Manual work is the enemy of growth. An ideal customer onboarding tool can see that a deal has closed, notice which products or services were sold, grab the appropriate templates and automatically create an onboarding project with the correct steps assigned to the onboarding team with deadlines auto-generated based on the day of the close.

Is all your data in one place? Being able to use metrics to determine what you're getting right or wrong is critical to a solid onboarding process (more on this in Mistake #3). If your company uses Salesforce, choosing a customer onboarding tool that is on platform should be a no-brainer.

Is it easy to use? Not only should a tool be easy for your Salesforce Admin to install and maintain, it should also make it easy to get your team up and running and have an intuitive interface.

MISTAKE #3

Not knowing the strengths and weaknesses of customer onboarding process.

"If you are unable to understand the cause of a problem, it is impossible to solve it."

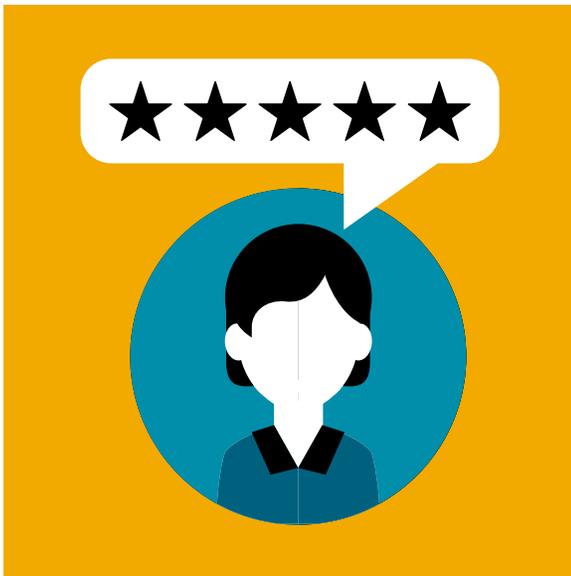
NAOTO KAN, FORMER PRIME MINISTER OF JAPAN

As described in Mistake #2, a solid customer onboarding tool should provide metrics that will help you continuously improve your onboarding process and grow your business. But before you can evaluate a thing, you need to agree on what metrics matter.

Not determining the right KPIs is probably the biggest mistake companies make when it comes to customer onboarding, as this failure will inevitably lead to misunderstandings, an inability to address problems and a loss of customers without really knowing why.

HOW TO AVOID MISTAKE #2

Track (and learn from) the right metrics.



Without the right metrics, increasing customer satisfaction and retention is close to impossible.

With a solid onboarding tool in place, it becomes much easier to gather and report on data. Here's how to make sure you're tracking the KPIs that matter to your team:

Involve stakeholders. When you approach leadership for support and guidance on setting up your customer onboarding practice, ask them what success looks like. Does success mean:

- ▶ A reduction in the time to onboard?
- ▶ An increase in NPS after onboarding?
- ▶ Fewer missed deliverables?
- ▶ Increasing retention in accounts that have been onboarded?
- ▶ More sales opportunities discovered in the onboarding process?
- ▶ More marketing leads from referrals from onboarded accounts?

Don't overdo it. Once you've defined success, determine 3-5 key metrics to start. Tracking fewer metrics forces stakeholders to decide what is truly important—there will always be time to add in more as your team's experience and knowledge grows.

Improve your process based on the data. Once you've identified your baseline KPIs to onboard a customer successfully, you should then be able to look at the process steps as a whole and see if there are any steps you can deliver better.

- ▶ Is your time to value where you thought it was? Can you improve on it?
- ▶ Are there specific reps that need coaching on a particular part of the process to help them hit the time target?
- ▶ Are there some steps that get skipped every time? If so, are they necessary?
- ▶ Does increasing contact with your client increase your NPS after onboarding?

Do all this and you won't run yourself ragged chasing data points that have little or nothing to do with success for your team.

CONCLUSION

First impressions matter. A lot.

Customer onboarding as business critical is entering the mainstream. It's also one of the most important investments you can make if you want to increase customer satisfaction and retention and grow your business.

In order to be successful at onboarding, it's important to approach it with the same level of top-down support, investment, and business rigor as any other strategic priority.

Whether your company is in the early stages of building a customer onboarding process, optimizing an existing one, or if it's never come up, there is a lot of opportunity to get out in front and make customer onboarding the real-world manifestation of your company's commitment to your values, brand, and customer experience.

HOW TASKRAY CAN HELP

TaskRay is the Leader in Customer Onboarding in Salesforce.

To manage customer onboarding, some use post-it notes, white boards and phone calls; some use email, spreadsheets and file servers; and others use a combination of all of the above.

We think there's a better way.

What could your team could get done if the tedious work of planning what needs to happen, tracking what's actually happening, and presenting what's happening to other interested parties were taken care of all in one place?

A Salesforce native customer onboarding solution like TaskRay can do all this, ultimately giving everyone on your team more time and energy to focus on making customers happy and watching your business grow.

Want to learn more about TaskRay? [Sign Up For A Free Webinar](#)

TASKRAY

ABOUT TASKRAY

TaskRay is the top-rated enterprise customer onboarding solution on the Salesforce AppExchange and a proud Salesforce ISV partner. Since 2010, TaskRay has delivered innovative customer onboarding and project management solutions designed to help companies scale their onboarding and implementation processes, drive greater efficiencies, and create unmatched customer experiences—all within Salesforce.



ABOUT THE AUTHOR

Jamie Cole, TaskRay's VP of Marketing, has a wide array of marketing experience in branding, campaign management, organizational messaging, web, social media, e-mail and direct mail for for-profits, non-profits and start-ups. As a member of TaskRay's leadership team, she is deeply involved in visioning and executing customer experience.

Copyright © 2018 by Jamie Cole. All rights reserved.

Published by TaskRay
806 S. Public Rd., Ste. 102
Lafayette CO 80026

No part of this publication may be reproduced or transmitted in any form, by any means, electronic, photocopying, scanning, recording or otherwise, without the prior written consent of TaskRay.

TASKRAY