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SAAS CUSTOMER ONBOARDING PLAYBOOK

FROM WELCOME TO WOW

Engaging Customers Right from the Start

Welcome! This customer onboarding playbook helps you map the customer journey, build out your onboarding program, measure impact, and more—we cover it all.

Here's what's inside:

- **Introduction:** Customer Onboarding: Why it Matters and What's in it for You
- **Section 1:** Mapping the Onboarding Journey
- **Section 2:** Building the Perfect Onboarding Learning Path
- **Section 3:** Set Milestones that Matter
- **Section 4:** Personalize the Journey
- **Section 5:** The Onboarding Scorecard
- **Section 6:** The Onboarding Escalator

Ready? Let's go!

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Customer Onboarding

Why it Matters and What's in it for You

Customer onboarding—or the process of ensuring new customers understand how to use your product or service to achieve their goals—is key. A successful onboarding program can increase product adoption, boost loyalty, and, ultimately, drive retention and revenue.

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Proof That Onboarding Matters

63% OF CUSTOMERS
consider the company's onboarding program when making a purchase. (Source)

Customers who receive a good onboarding experience are
4X MORE LIKELY
to refer the business. (Source)

70% OF CUSTOMERS
say understanding how to use products is very important to winning their business. (Source)

74% OF POTENTIAL CUSTOMERS
will switch to other solutions if the onboarding process is complicated. (Source)

55% OF PEOPLE
say they've returned a product because they didn't understand how to use it. (Source)

Despite onboarding's importance, over **90%** **of customers think companies can do a better job.**

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Scale Customer Onboarding with Digital Customer Education

The expectation of Digital Customer Education is that it offloads many of the responsibilities traditionally placed on Customer Success Managers (CSMs), Customer Education Managers (CEMs), and Support. **That's true.**

But abandoning the human touch completely will diminish the onboarding experience.

Instead of adopting a no-touch customer success model, embrace one that blends people and technology. This is called **low-touch customer success.**

With a low-touch model, the responsibilities of CSMs and CEMs shift from manual, time-consuming and costly 1:1 training to value-added responsibilities that increase retention and revenue.

For example, with the extra time, customer-facing teams can:

- Personalize support, understand the customer's unique needs, and act as a single point of contact.
- Offer tailored advice, answer questions, and help customers setup the software to align with their goals.
- Proactively reach out to customers with value-add strategies.
- Quickly handle customer queries and concerns.
- Monitor customer usage and engagement to identify potential areas where customers could benefit from additional guidance or resources.

Defining Low-touch Customer Success

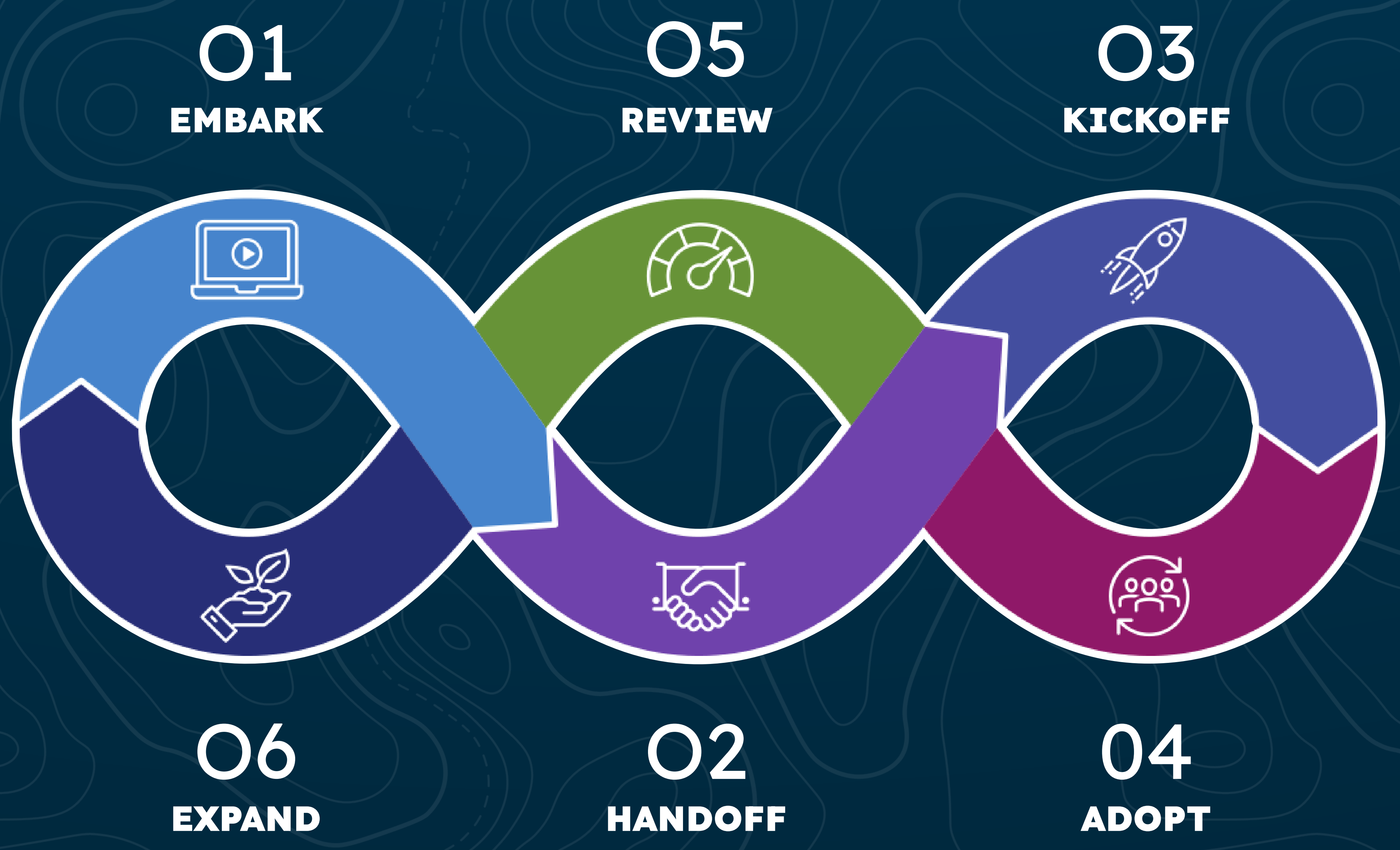
Low-touch customer success uses automation and self-service resources to reduce interactions between customers and customer-facing teams.

MAPPING THE ONBOARDING JOURNEY

Your customers won't see every part of the onboarding process. The companies with the best onboarding experiences started by meticulously mapping the customer journey.

Mapping the onboarding process may vary from company to company, but according to Donna Weber's Orchestrated Onboarding™ framework highlighted in her book Onboarding Matters, these are the essential six stages to the onboarding journey and we're not going to mess with perfection.

The Orchestrated Onboarding™ Framework



Orchestrated Onboarding™ framework, Copyright by Donna Weber

What's useful and insightful about these steps is that they start **before** a customer ever signs the contract and goes beyond the standard “onboarding” period. You lay the groundwork during the pre-sales process so that customers understand what to expect and are confident they'll receive a thorough onboarding experience. Then, you continue educating your customers as their skills and confidence grow.

Understanding these touch points will help you identify snags and challenges that diminish the onboarding experience and get your customers off to an unfavorable start.

Following these steps allows you to create the ideal onboarding journey that meets your customers' unique needs and helps them reach their intended outcomes faster.

1. Embark

Demonstrate the value of your Customer Success team, onboarding program, and digital academy before the sale closes. This stage of the onboarding journey will typically be run by Account Executives (AEs), Solutions Engineers (SEs), and other teams involved in the pre-sale process.

Your objective during the “embark” stage is to not only show that you’re at-the-ready to help them achieve their intended outcomes quickly but that you’ll be there for them well beyond these initial touchpoints.

PRO TIP

During the sales process, share a piece of content that lays out what to expect during the onboarding process.

2. Handoff

At the “handoff” stage of onboarding, you transfer ownership from AEs to CSMs. This should happen behind the scenes, i.e., before a CSM makes contact with the customer, to ensure everyone’s on the same page and the CSM understands the customer’s goals.

This knowledge transfer is essential to decrease the time-to-first-value (TTFV). AEs should share video conversations, notes as well as related information about the customer and their company, etc. In a perfect world, most of this information will be housed in your company’s CRM.

PRO TIP

Once papers are signed, CSMs should schedule a quick, but valuable meeting with the AE to clarify the customer’s challenges, expectations, and goals.

3. Kickoff

At the "kickoff" stage the AE has officially left the party, and the customer's success is now in the hands of the CSM and other customer-facing teams, like CEMs and Support Reps.

This initial touchpoint with a CSM or CEM should set expectations, and milestones, and, ultimately, give your teams an understanding of what the customer expects from the product —and what they'll have to do to help them achieve them.

This is also where a CSM should make sure that every new user has access to your customer academy.

PRO TIP

With Digital Customer Education, an automated email should take care of introducing training to the customer. Now, the first customer call can focus on strategic growth and product adoption, so make sure you come to your first meeting with clear goals for your conversation.

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4. Adopt

It’s time to get your customers up and running. The “adopt” stage of onboarding aims to check off all the boxes necessary to get customers to realize the value of your product (the first milestone).

New users should be well on their way to completing your onboarding courses in your academy. They should be familiar enough with the product to zero in on their specific needs and help them use the product strategically. This may include integrations, account setup, or working with Solution Engineers (SEs) on customization.

PRO TIP
Prep for your customer calls by looking at their account data to see where you could help them gain value faster.

5. Review

Before you let customers spread their wings, run through everything—from a technical and non-technical perspective—a final time.

Let them ask any remaining questions, express any concerns, and communicate what they need to know to continue realizing product value. This will most likely include a deep dive into your academy, where they can find relevant resources, and how they can contact you if they need more white-glove support.

PRO TIP

Wind down the official onboarding stage with an overview of their progress and a list of questions to understand what they need from you and the product moving forward.

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6. Expand

Communicate with your customers how you'll keep the customer in the loop about new features, where—and how—they'll learn about them, and what they can expect from your relationship. Even though the onboarding process is over, the "everboarding" journey has just begun.

PRO TIP

Send your customers links to further their training in your academy. This keeps your customers educated on your product and leaves room for customer calls to remain strategic.

What's Everboarding?

Everboarding is built on the idea that learning never stops. Customer education is a continuous path that doesn't end with the onboarding process. Create your digital customer education program to include advanced features and concepts to keep your customers engaging with your academy forever.

Building the Perfect

ONBOARDING LEARNING PATH

Part of making your customers successful is properly training them with your product or service. With traditional customer education, this is a very manual, time-consuming process.

Digital Customer Education gives your customers the training they need on their own time, leaving CSMs to get into the weeds of their desired strategic outcomes and ensure they're successful from the start.

PRO TIP

You don't need to cover everything about your product right now. Instead, focus your onboarding courses on only what's needed during the crucial onboarding phase.

Here's a quick overview of how to build out an effective onboarding learning path.

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1. Define Goals & Objectives

Clearly identify the goals and objectives of the onboarding process. Determine specific outcomes you want to achieve through the learning path. Write them down and even incorporate this information into your course as an introduction.

2. Break down the Learning Path into Courses & Modules

Divide the onboarding process into modules based on logical progressions or topics. Each module should focus on specific learning objectives to ensure clarity and effectiveness.

Remember: Modules make up a course; several courses make up a learning path. Keep each course and module very specific so that customers know exactly what they're supposed to be learning.

3. Define Learning Objectives

Clearly define the learning objectives of each module and make sure they're specific, measurable, achievable, relevant, and time-bound (SMART). Clearly set expectations of the material and the time needed to complete each module or course.

4. Determine the Sequence & Structure of Each Course

Define the order in which modules and learning activities should be completed. Consider the logical flow of information and skill development.

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5. Design Content & Learning Activities

Create engaging and interactive content to address the learning objectives. Incorporate various learning activities such as videos, quizzes, interactive modules or product tours.

6. Set Timeframes & Milestones

Establish timeframes for completing each module or stage of the onboarding process. Define milestones to track progress and provide customers with a sense of achievement.

7. Assessments & Progress Tracking

Incorporate assessments and quizzes to evaluate customers' understanding and progress. Provide feedback and performance metrics to help them gauge their learning journey.

DELIVER ONBOARDING CONTENT ON THE RIGHT CHANNELS

You'll deliver most of your onboarding content through your customer academy, but that's not the only touchpoint your customers will land on. Deliver onboarding content via additional channels your customers use every day:

- **In-app Messaging:** Offer guided walkthroughs of key features and functionalities.
- **Email**: Send emails directly from your Learning Management System (LMS) with links to your academy, relevant information, tips, and resources.
- **Knowledge Base**: Share articles, FAQs, and tutorials accessible anytime, anywhere.
- **Social Media and Community Forums**: Share content, gather feedback, and encourage peer-to-peer support.
- **Interactive Product Tours**: Allow customers to explore your product in a virtual environment that simulates their use case.

Enhance these channels and tactics with personalized onboarding delivered by CSMs and CEMs based on the needs, preferences, and use cases of each customer. Think of these as deep dives and 1:1 strategy-building sessions that cultivate relationships and drive retention.

SET MILESTONES THAT MATTER

To maintain progress and accountability for your customers and teams, set milestones that matter. These can come in all shapes and sizes, so set them based on individual customer needs.

PRO TIP

Source feedback on milestones often. Not only will this help you tweak the current onboarding the experience, but the nuggets of wisdom will help you improve for future customers.

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Here are a few common onboarding milestones

ACCOUNT CONFIGURATION

Guide customers through account creation, adding team members, and applicable settings.
(You can likely automate this milestone.)

PRODUCT-BASED EDUCATION

While a customer academy frees CSMs from 1:1 training, it's vital to confirm customers have a working knowledge of the product and see value toward their business goals.

SUCCESS PLANNING

Identify goals, objectives, and key performance indicators (KPIs) to measure short- and long-term success.

INTEGRATION AND CUSTOMIZATION

Help customers set up necessary integrations and customizations.

GO-LIVE DATE

Not every product has an official "launch," but for those that require an assisted implementation, this is a big one: **Review everything a final time, ask lingering questions, and press "go."**

ONGOING SUPPORT

Keep customers updated about new features and best practices. Help them expand their use cases for the product and see long-term value.

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PERSONALIZE THE JOURNEY

Personalization is now a "must-have" for B2B businesses. In fact, 72% of business buyers expect vendors to personalize engagement. (Source)

But isn't one-to-one training the most personalized?

Let's not confuse personalization with unique experiences. Each customer will have their onboarding-specific needs, but they're not 100% unique. The majority of onboarding training can easily be addressed through your digital customer academy, removing much of the hassle of manual training. If there are needs beyond that, a CSM can step in and work with customers to cater to those individual requirements.

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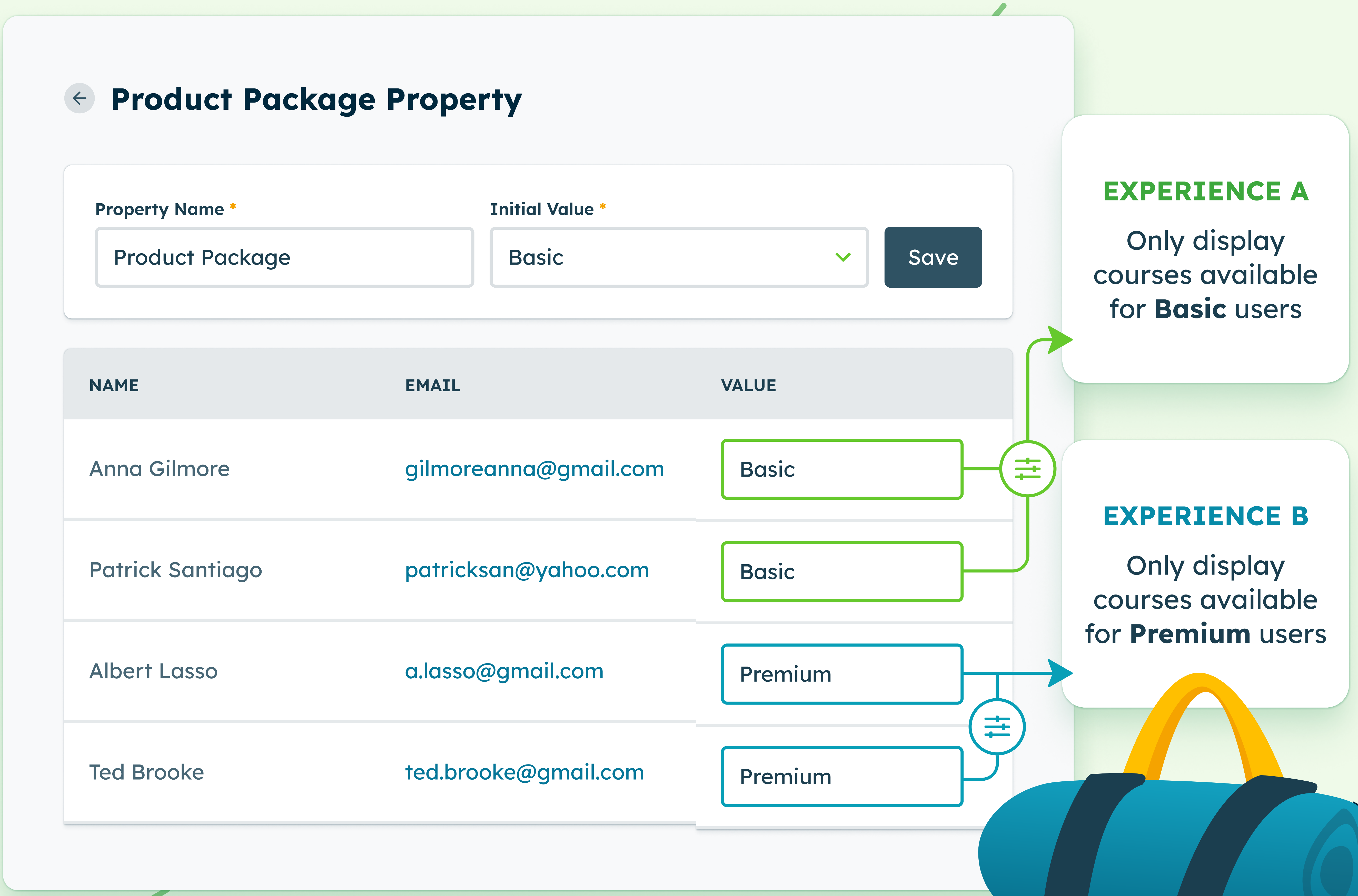
You can create a personalized, but not necessarily unique onboarding experience by considering a few options as you begin. Think about how you can segment your customer base and how each segment might require a tailored onboarding program. From there, design customized onboarding experiences—such as specific learning paths for each segment—that address their unique pain points, goals, and learning preferences.



Below are three examples of using segmentation to create a customized, but not unique, onboarding journey.

INDUSTRY

When designing your onboarding program, consider the industries your customers operate in. Different industries have unique needs, terminologies, compliance standards, and challenges. Personalize your onboarding content and scenarios to reflect these industry-specific elements. This could involve developing industry-specific use case demonstrations, aligning your platform's features with the industry needs, or using industry terms to make your content more relatable. This will make your customers feel that your product truly caters to their unique context and needs.

USE CASE

For effective customer onboarding, it's crucial to understand and cater to the specific use cases of your product. By tailoring your onboarding program to show how your product solves the specific problems faced by your customers, you will enhance their understanding and adoption of your product. Whether it's showcasing the efficiency of your platform or demonstrating how your product increases productivity, making these use cases clear and relatable will result in a smoother, more effective customer journey.

LEVEL OF SERVICE

Understand that your customers may have access to different features and services based on the plan they're subscribed to. As you design your onboarding program, take into account these variations and customize your training materials accordingly. Make sure your customers learn to use the features available in their specific plan to the fullest, instead of showcasing functionalities they don't have access to. This way, every customer feels that the onboarding program is tailored specifically for them, optimizing their experience with the resources available.

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THE ONBOARDING SCORECARD

Key Metrics and KPIs

Setting and tracking key performance indicators (KPIs) helps you develop an objective and quantifiable system to measure the impact of the program, process, and content. KPIs also offer you actionable insights you can use to make data-driven decisions and ensure you're delivering an effective and efficient experience across your customer base.

You can also identify bottlenecks and pain points that prevent customers from reaching their desired outcomes during these early days, which can lead to dissatisfaction and churn.

Finally, by tracking KPIs, you can optimize the onboarding experience to make it more efficient and user-friendly, allowing you to make optimizations which will increase engagement, product adoption, and long-term value.

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Onboarding KPIs to Consider

TIME-TO-FIRST-VALUE (TTFV)

How long it takes for a new customer to achieve their first significant success with your product.

ACTIVATION RATE

The percentage of customers who complete key actions during the onboarding process.

ONBOARDING COMPLETION RATE

The percentage of customers who complete the entire onboarding process.

RETENTION RATE

The percentage of customers who continue using your product after a specific time period.

SUPPORT TICKETS

The number of support tickets submitted by new customers (in the short and long term).

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THE ONBOARDING ESCALATOR

Maximizing Onboarding Success with Northpass

With the help of Digital Customer Education, you can make your onboarding process a more effective and efficient program for customers and CSMs alike.

Northpass works with Customer Success and Education leaders to build a fully functional academy to make your onboarding experience as powerful as possible.

Learn more at northpass.com or send a note to **info@northpass.com**.

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RESOURCES

Learn more about the six stages of onboarding:
What is Orchestrated Onboarding and Why You Should Care.

Need some help to increase engagement with your customer academy? Download this Customer Academy Promotion Playbook.

Want to connect and learn from others in the industry? The Customer Education Management Association (CEdMA) is where it's at. Check out their website, it's full of helpful resources.

Need to prove the impact of Digital Customer Education? Check out this impact calculator.

Ensure your Leadership team understands the value of Digital Customer Education. Download and share The Business Case for Digital Customer Education.

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