



Ascendr

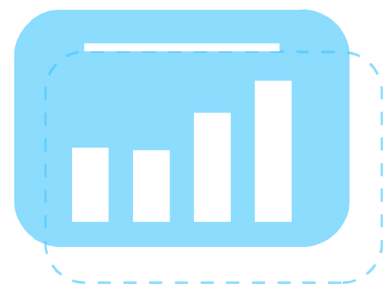
THE

ONBOARDING

LAB

World-Class

Customer Onboarding Program Checklist



Onboarding experiences differ from company to company. The way to stand out from your competition is to make the initial experience an impressive, encouraging, and energising partnership.

Our 10+ years in the SaaS industry has taught us some valuable lessons when it comes to creating a world-class customer onboarding program.

We're excited to share this detailed checklist to help you create an exceptional program for your customers.

Have a read through and do the following:

1. Audit your current program to identify any gaps
2. Improve one section at a time to make it manageable
3. Collaborate with other teams to create best practices
4. Feedback to leadership on the progress and impact

Pre-Sales Presence

The first phase of a world-class onboarding experience actually happens before the deal closes. This is an opportunity to strengthen alignment with all stakeholders for a smooth transition into the next phase.

Checklist:

- Set expectations for the upcoming onboarding
- Collaborate with the sales team to close the deal
- Identify any potential implementation challenges
- Identify stakeholders, power users, and responsibilities



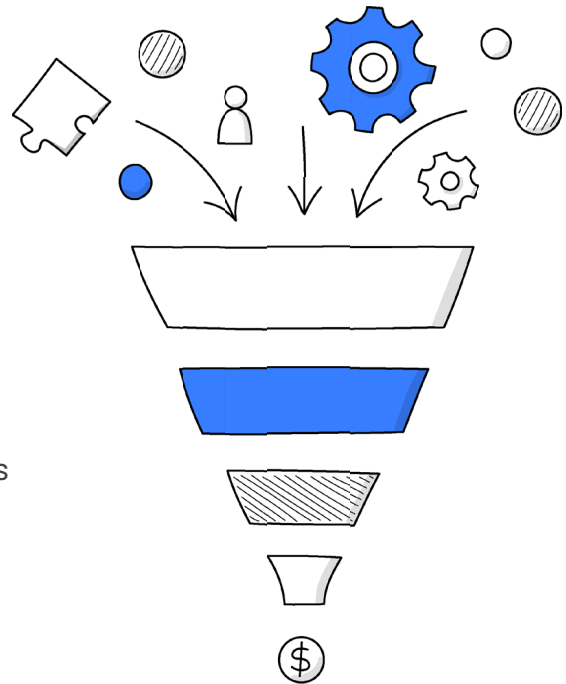
Sales Handover Process

Collating the valuable information from the sales conversations is a good start. Digging deeper into understanding the customer will not only make you much more informed and confident but will also give a great first impression.

Work with your sales team to ensure this process is clearly defined and repeatable.

Checklist:

- Confirm CRM details are completed
- Conduct internal handoff from sales to onboarding, discuss:
 - ◇ Customer pain points that your solution solves
 - ◇ Customer goals and expectations
 - ◇ Identify user details and expectations
 - ◇ Identify economic buyer and expectations
 - ◇ Any technical specifics about implementing
 - ◇ Any time frame details



Note: This is often cited as the main challenge in a successful onboarding. Spend time making it efficient and valuable.

Kick Off

You don't get a second chance at a first impression. This is your time to shine! It's important to build rapport with your customer from the start. The kick off phase highlights the next steps, manages expectations, and aligns the team involved. It's also a chance to dig further into their challenges and goals.

Checklist:

- Send personalised welcome email
- Schedule kickoff call
- Introduce the onboarding process
- Share the onboarding timeline and expectations
- Share onboarding resources
- Highlight responsibilities of the users & stakeholders
- Share next steps

Change Management

Remember, it can be a painful process to implement new software within an organisation. Your best chance of a smooth roll out and successful adoption is to have a plan for change management. World-class onboarding helps customers navigate this process.

Checklist:

- Assess organisational readiness for change
 - ◇ Are the stakeholders aligned?
 - ◇ Are the users informed and aligned with the business goals?
 - ◇ Are there any initial concerns to be addressed?
- Develop a change management strategy that works for the customer
 - ◇ Align with customer champions to manage a successful roll out
 - ◇ Make all stakeholders aware of the plan
 - ◇ Identify and communicate “what’s in it for them” for each stakeholder

Implementation

Implementation is the technical set up of the onboarding experience. Without this, the onboarding can’t move on. This can be very technical and without customer buy in and alignment it can be a painful step. It’s important to make this as smooth as possible. Focus on speeding up time to value. You’ll build trust by delivering value early.

Checklist:

- Assess any technical requirements
- Identify key value milestones
- Create a project plan, project tracking, and deliver customer updates through tools like Ascendr
- Set up the customer account
- Assist with data migration if needed
- Deliver any agreed customisation, development, configuration
- Provide go live support where applicable
- Facilitate integrations

Training & Education

What good is software if you don't know how to use it? Some training is hands off in the form of walk through guides and tool tips. Other training is one-on-one and requires a more structured plan. Consider what is best for your product. This all helps to reduce the support effort, increase self-serve capabilities, and improve user adoption.

Checklist:

- Develop training plans
- Provide self-service learning resources
- Consider creating online courses and shareable certifications
- Share the Knowledge Base/Help Center
- Collaborate with the product team to implement in-app onboarding flows
- Create dynamic in-app tooltips and walkthroughs using tools like Intercom

Customer Journey Map

This is the best way to understand your customer's journey including pain points, actions, and milestones. It helps you understand the perspective from your customers point of view. You can start simple and build on it over time.

Checklist:

- Define clear onboarding milestones
- Set up milestone tracking
- Identify key product features to use
- Identify potential drop-off points
- Celebrate milestone achievements
- Identify handover criteria
- Create a journey map document
- Share and collaborate with the internal stakeholders
- Share and track the journey with the customer through tools like Ascendr



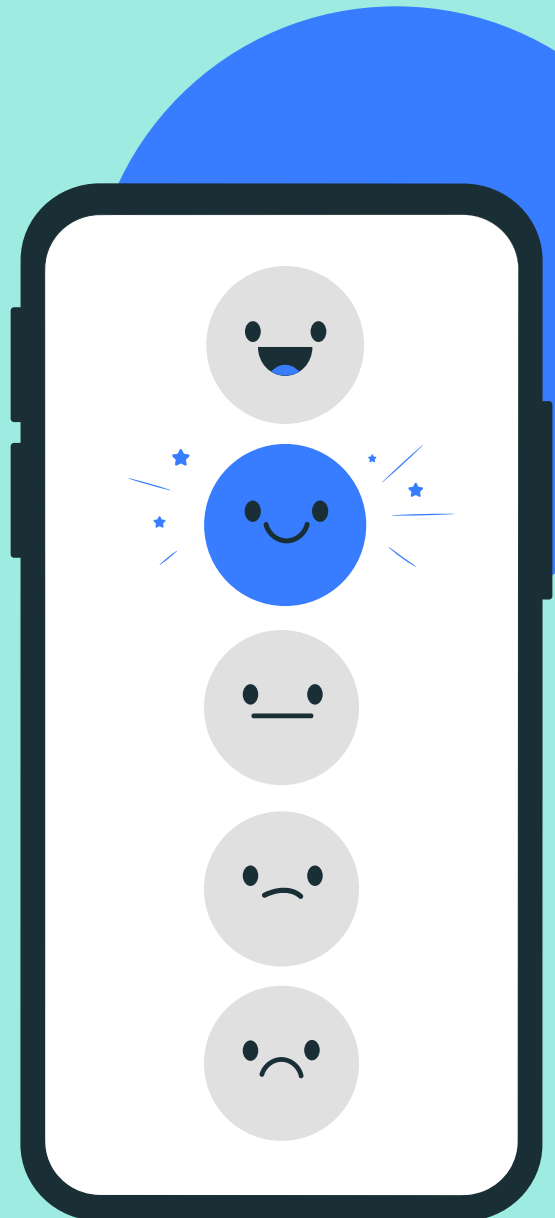


Feedback Loop

Collecting feedback from customers is good. Creating an effective feedback loop to keep customers informed is world-class. Start collecting valuable feedback from day one to set the tone.

Checklist:

- Collect feedback
 - ◇ Via emails, calls, support tickets, and surveys
 - ◇ Acknowledge the feedback and explain what will happen next
- Collate into a source of truth
 - ◇ Trello, Notion, Jira, spreadsheet - choose a place that internal teams can access
 - ◇ Categorise the feedback into relevant topics
- Establish a regular internal meeting
 - ◇ Include all the relevant stakeholders and decision makers
 - ◇ Create an agenda for a productive meeting
 - ◇ Create end of meeting actions - review these at the start of the next meeting
- Close the loop
 - ◇ Promptly feedback to customers on internal discussions
 - ◇ Share a customer facing roadmap for transparency
 - ◇ Highlight how their feedback has impacted internal conversations



Communication

The onboarding period involves plenty of back and forth communication. Ask your customer how they prefer to communicate. Establish a need for responsiveness on both sides for a smooth onboarding.

Checklist:

- Establish regular check-in schedule
 - ◇ Always add value to maintain engagement and attendance
- Utilise customer onboarding platforms like Ascendr for ongoing communication and real time collaboration
- Create automated email sequences
 - ◇ Share insights, case studies, suggested features based on usage, and celebrate milestones
 - ◇ Develop personalised email sequences based on user behaviour and segments
- Highlight support channels
 - ◇ Direct the customer during onboarding and beyond to the best channels for success
- Create a plan for unresponsive customers
 - ◇ Set triggers for low product usage
 - ◇ Create an escalation process
 - ◇ Develop a re-engagement campaign with targeted messaging

Success Metrics

Measuring the success of your onboarding experience is key to becoming world-class. Use internal metrics to measure effectiveness. Use customer metrics to measure their success. Both are important in elevating the customer onboarding function within the company.

Checklist:

- Choose and define onboarding success metrics
 - ◇ Customer Satisfaction (CSAT), Net Promoter Score (NPS), Customer Effort Score (CES), product usage stats, Time to Value (TTV), length of onboarding, 5* reviews, no. of referrals
- Implement internal tracking system in a tool like Ascendr
- Set up reporting dashboard for customers to see progress
- Measure against initial customer goals

Handover to Customer Success

We know how important the handover from sales is but what about when moving a customer into their next phase of the journey? Whether you are handing off to another team member or you are keeping responsibility yourself, it's important to mark the transition from one phase to another. Think of it like a graduation from beginner to proficient user.

Checklist:

- Send an onboarding completion survey
 - ◇ Include a score for satisfaction with the onboarding experience
 - ◇ Include a score for their confidence in using the product
 - ◇ Ask for any further feedback that would improve their experience
- Define criteria for successful onboarding completion
 - ◇ This can be based on metrics, survey results, feature usage, milestones reached in the product
- Conduct handover meeting with customer and relevant internal team member

Additional training

Even though onboarding has a specific time frame, there will be opportunities to provide additional training throughout the lifecycle. This is a chance to reset with customers, resell the benefits to new users, and highlight new features within the product.

Checklist:

- Create a plan for one-off trainings to accommodate new users
- Consider a pricing strategy to increase engagement & attendance
- Create a plan for refreshing on specific complex features
- Realign responsibilities if the power users change



Revenue

If you are not already doing so, it's time to consider charging for your world-class experience. Refrain from discounting onboarding packages in the sales process as this undervalues the most important part of the life cycle.

Checklist:

- Charge for your dedicated onboarding program
 - ◇ Assess the length of the onboarding and the people involved
 - ◇ Create a Scope of Work (SOW) to highlight what will be included and what will not
 - ◇ Put a timeframe on the onboarding
 - ◇ This is not (usually) a recurring fee
- Charge for additional training
 - ◇ Determine the length of these trainings
 - ◇ Consider pre-recorded content access
 - ◇ Provide one-on-one training for best engagement
 - ◇ Consider selling a package of hours that can be used throughout their contract

Customer Onboarding is often an underserved area. The impact of creating a world-class program is far reaching.

You'll notice:

- a decrease in churn
- lower support costs
- faster value realisation
- deals are easier to close
- customer satisfaction increases
- highly confident product users
- eagerness to be vocal advocates
- upsells, expansions, and renewals become easier discussions

Why not start today?



Created for curious SaaS minds by The Onboarding Lab & Ascendr.

The Onboarding Lab, created by Clare Knight, helps you expertly build your customer onboarding program. Access free weekly content to inspire experimentation through projects. Clare has over a decade of experience working in Customer Success & Onboarding. Find out more:

www.theonboardinglab.com

Ascendr is a leading provider of customer onboarding solutions, dedicated to reducing early stage churn, increasing adoption, and boosting annual recurring revenue (ARR) for your clients.

www.ascendr.co.uk
