

Guide to:

Successful Customer Onboarding



Getting Started

The first 90 days will decide the fate of most implementations. While the complexity of your product could shift the timeline, if a customer feels let down during onboarding, then the journey ahead could be precarious.

Onboarding is the initial stage in the customer journey - from the moment of purchase to before a customer sees their first value. To ensure a smooth start in the customer journey, you need to provide the right support and resources to facilitate implementing your solution and deploying it across your customer's organization.

This guide offers some best practices to follow to ensure a smooth onboarding for your customers.

1

Identify Key Performance Indicators For Onboarding

Companies use key performance indicators (KPIs) to gauge how effectively they have achieved key business objectives. Similarly, for onboarding, a customer success department needs to ensure they have their onboarding KPIs so that they can evaluate their success at reaching goals. The KPIs include:

Time taken to complete onboarding

Onboarding should be completed within a reasonable amount of time. If it takes too long to onboard a customer, it obviously does not bode well for the company and customer.

Quality of onboarding

Although quality is usually difficult to be measured, companies can use the following performance indicators for onboarding:

Usage after onboarding

Companies can look at license utilization to see how many customers have started using or adopted the product(s).

CSAT survey

Customer satisfaction surveys are a good avenue to get feedback on the onboarding experience. Companies are able to know first hand what customers liked or didn't like about the onboarding. A customer satisfaction survey can be set up as part of a Success Play or Playbook so that it is automated and sent to customers when they meet the criteria to take the survey.

CSM score

Customer success managers (CSMs) are at the forefront when it comes to interactions with customers. Through their communications with customers, CSMs can determine if they are having a good onboarding experience (or not). The CSM score is given by CSMs based on their perceptions of how well customers are doing in their onboarding process.

2

Put the Right Processes in Place

The right processes need to be put in place to make sure companies are always on top of things and are aware in terms of where each customer is at during onboarding. It is important to identify the processes up front, so companies can plan them accordingly. Some definition of processes could be:

Schedule a kick off call:

Define the goal, scope, timeline, and key milestones for onboarding

Set up a technical meeting:

Understand what systems need provisions for customers, new users, data imports, etc.

Give appropriate training:

Determine the type of training the customer needs to undergo and make sure it is delivered

Schedule a kick off review:

Have a call or in-person meeting with the customer to go over the processes needed for onboarding



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Get Visibility Into Customer Status

Once onboarding starts, it is vital to know exactly how your customers are making progress. Consistently monitoring the status of your customers will help to know if more proactive measures need to be taken.

If the account is in good health, let the customer continue along their journey. If onboarding has not yet started, it is imperative that the customer success manager reach out to stakeholder(s) to make sure they get started soon. If need be, follow up in a week with a scheduled progress review.

4

Complete Key Milestones Within a Desired Timeframe

Key milestones are a necessary prerequisite of developing a timeframe for your customer onboarding. Milestones are quantifiable, such as the number logged in users, usage of key features, specific business outcomes, etc. and are used to show if customers are seeing value during onboarding. Beyond milestones, it is also important to track any other key events that may need your team's attention.

5

Create Just the Right Program to Drive Adoption

To drive adoption during onboarding, it is good practice to employ nurture campaigns. Establish automated, relevant messages and content that are based on measurable goals specific to onboarding customers. Paired with the right event triggers, campaigns can help successfully guide their onboarding.

Example

The goal of the CS team is to get customers from onboarding to live within 30 days. A personalized email is automatically kicked off 2 weeks after onboarding began and sent to the key contacts of accounts that have yet to complete this step.

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Analyze Bottleneck Reports

It is always best practice to track business outcomes and create reports for management or customers to see if there are bottlenecks during onboarding that need to be resolved.

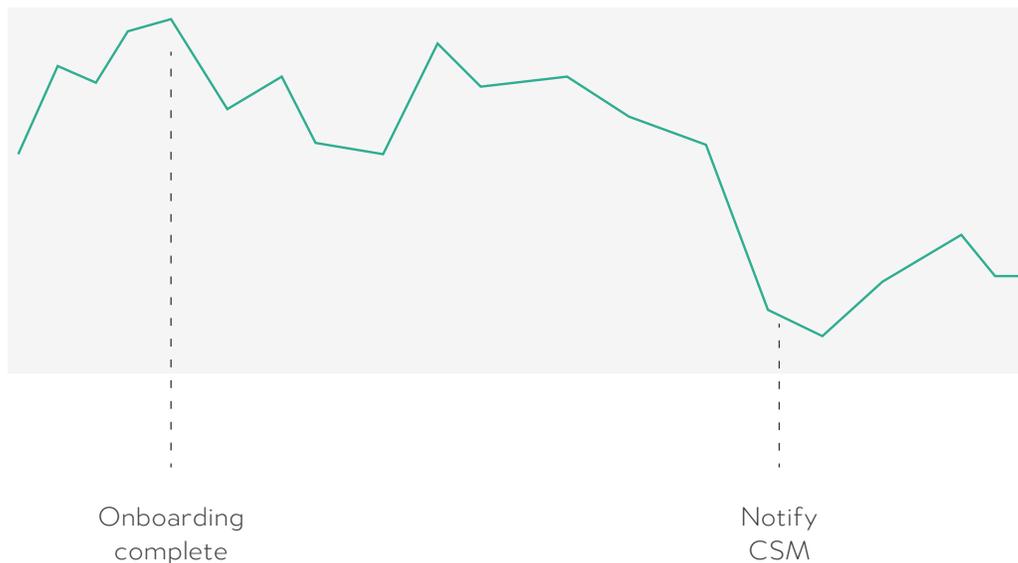
This is critical if there is a need for executive support or buy-in to resolve an issue. Using active, real-time monitoring will help to identify bottlenecks (if any) quickly or even prevent them from happening.

7

Create a Usage Report and Adoption List

With a usage report, you can see which customers are adopting the different “modules” of your product. It also helps to identify when a key contact has stopped using the product or a key product feature. In addition, you can create a specific play to notify the customer success team when there is a drop in product usage for important accounts or create ongoing campaigns to increase product adoption.

Weekly Active Usage

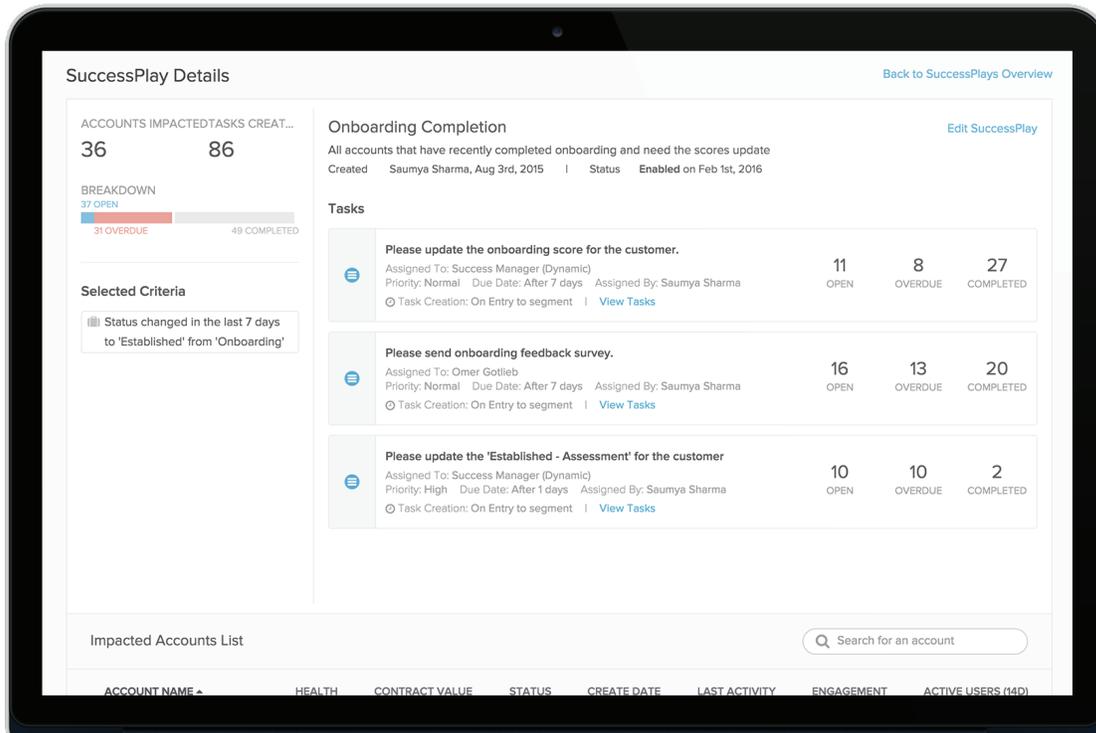


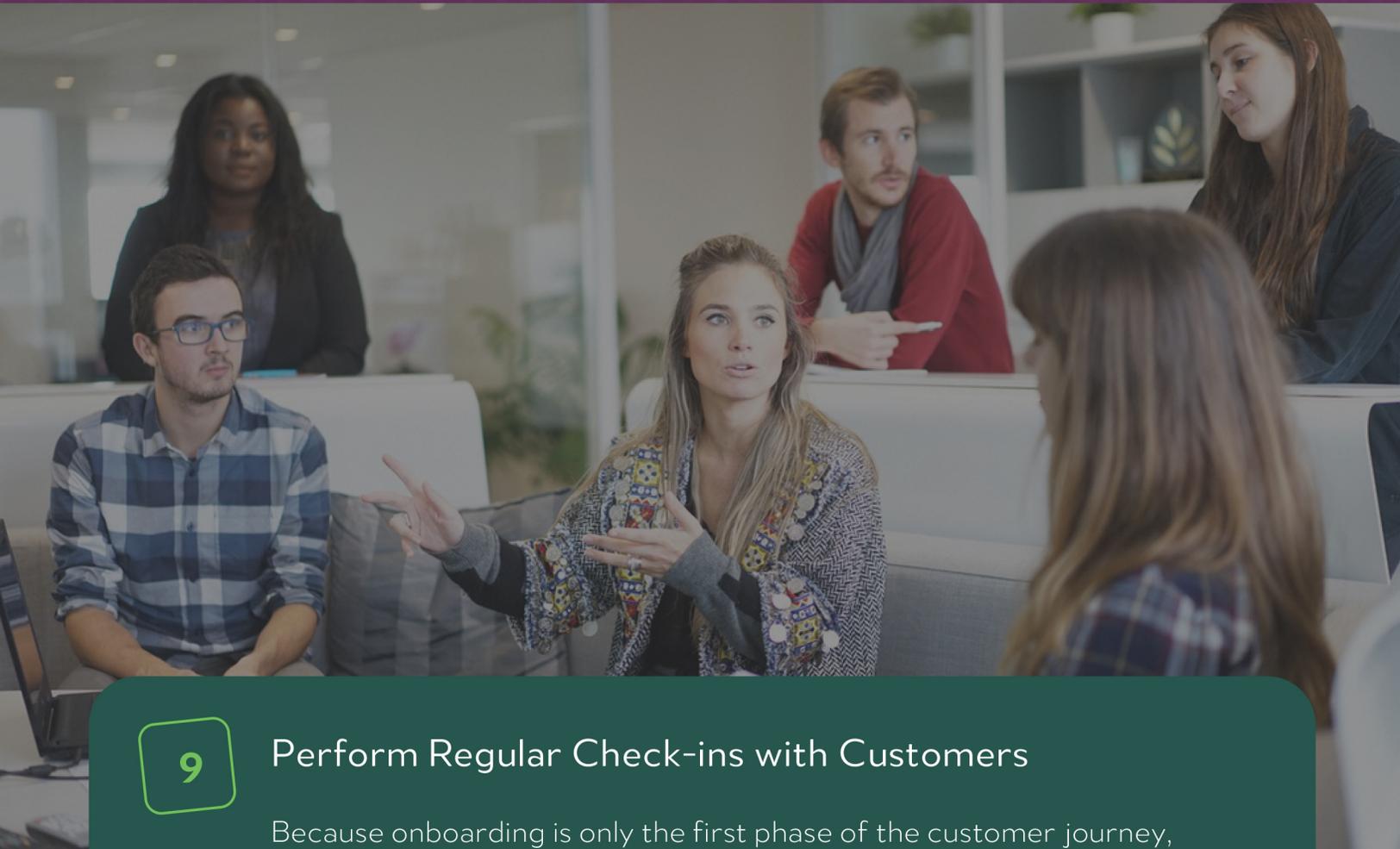
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Measure Onboarding Results

Customer success teams need to be able to measure and understand onboarding results. By evaluating what they have done and how well they are doing to get customers onboarded, they can determine the effectiveness of their strategies.

Measurement of results could include the time taken to complete the customer onboarding, product adoption, usage frequency, etc. If onboarding results are less than ideal, companies might need to adjust unrealistic goals or improve processes to achieve better results.





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Perform Regular Check-ins with Customers

Because onboarding is only the first phase of the customer journey, companies must plan strategically on providing long-term check-ins with customers to make sure they are seeing value throughout their journey. A good avenue to gather feedback from customers is using campaigns. i.e. Sending customers a satisfaction survey after onboarding. A success play can be created to make sure the customer success team reach out to the accounts at least every [x] weeks/months.

Once the customer sees the business impact and value of using your product/solution, their onboarding is complete.



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