Onboarding your customers with purpose, momentum, and precision

"The seeds of churn are planted early, and those seeds are planted deep if your onboarding experience is bad." – Lincoln Murphy

It's widely understood that a good onboarding is critical to ongoing customer happiness. But it's tricky, and we often miss the mark because:

1. Onboarding a new customer is hard to do.
2. We tend to focus on the wrong stuff.

For some companies, the customer onboarding "process" can be as simple as flipping a switch to activate a new customer and letting them get to it. In that scenario, those customers will likely attempt to use your product with no guidance or training. They'll quickly get frustrated, they won't be successful, and the seeds of churn will blossom into full-blown regret.

Purposeful onboarding, meanwhile, integrates desired customer outcomes and strategic insights about what they expect from your product. It includes the basics for each targeted team member: has she created a login, has she gone through initial training, does she know how to contact support, has she plugged in relevant company information like key data, workflows, etc., and has she logged activity within the software to indicate usage? Well executed onboarding features a comprehensive plan, including the steps for migration from the old system to the new, gathering technical requirements, and product training that might include everything from self-guided learning systems to real-time virtual or on-site training sessions. More than anything, successful onboarding enables intense and productive customer interaction and empowers the customer to use your product to its maximum potential.

So, how do you turn onboarding from a chore, to a delight? It takes strategic discipline, and that discipline needs to start before your customer even becomes your customer.

Keep your foot on the gas

Before they were your customer, they were a prospect. They've been shown how fabulously your product will enhance their business by alleviating pain, improving efficiencies, and increasing revenue. A salesperson likely addressed every question quickly and assured them they were making a sound and smart financial decision. They saw logos of big, successful companies on your website who had made the same choice, only validating their decision further. Now that contracts are signed, and it's time to go, they are excited, and their expectations are high.

They're expecting a lot … This transition is critical … and it's where things often hit the skids. And fast.

But, you can keep the momentum going and continue the excitement your customer has through thoughtful planning and by keeping your customer front of mind. It's like any new relationship. This is the time to lean into the formalities, show up with your best foot forward, and bring all the good stuff to the table. You don't want your date to leave before the meal's been served.

To start, there are three fundamental questions I ask before beginning the onboarding process.

Question 1: Why did the client purchase the software and what was the process?

Why it's important: It is critical to learn from sales what pain points and/or business outcomes drove the company to work with you in the first place, so don't let them scurry off to the next deal without at least one thorough conversation. This will help you focus on the key areas that are most important to the customer right from the start. You'll also understand very quickly if the purchaser and the end user are not one in the same, which is usually the case. You may need to "re-sell" a new stakeholder (or a team of them) on the value of your product. It's key to know what they need.

Question 2: How complex is the implementation?

Why it's important: Setting expectations is critical in this phase for not only your customer but also for your internal team. Allocating time and resources, and aligning on a timeline will keep you and your team organized, and your customer well-informed. What are the milestones that need to be hit and when for the customer to start using the product effectively?

Question 3: What are the points during the implementation when you can provide value, maybe even before they're 100% onboarded?

Why it's important: We tend to focus on our own milestones and metrics while we're working with customers. Those are important, but even bigger are the little wins along the way that boost customer excitement and interest before go-live ever happens. Maybe when their data is loaded and they can start pulling reports, or sharing documents even before the workflows are completed. Hunt these opportunities out and celebrate the wins that matter to your customer.

Take Charge

Answering these key questions will help you keep your customer's experience top of mind throughout the onboarding process, and give you built-in triggers to jointly own success moments around that. Whether or not your company has project managers keeping the trains running on time, or developers on calls to discuss data integration, your job in Customer Success is to set expectations and drive toward success for the whole team along with your customer. Ensure they are getting value from your product as early and as frequently as possible.

Often, your customer can be the very pain point that is causing delays and frustration. It's your job to be their advocate, but also to help them understand the value to their business of getting the software plugged in.

As Kia Puhm discusses in How To Keep Customers Motivated and Focused, "While customers have good intentions when it comes to using a product, their time and energy can be divided between different priorities. It can be easy for a customer to postpone learning and using your product, or veer off course, especially if they aren't being held accountable or there is not a plan that ensures their success."

So, if you have an internal team with critical activities, a customer with multiple stakeholders and deliverables, and a business outcome to achieve with momentum, how can you approach success when you may or may not manage the onboarding yourself? Here is a good list to get you started:

1. Get the Handoff right — Don't make your customers repeat themselves or create confusion and frustration when your understanding doesn't jive with what they think they bought. And keep the salesperson engaged until this part is settled. They should help you bridge the gap.

2. Make a plan — Know the timeline, the milestones, and the customer's time to value. Know that you may veer off course but keep your eyes on the road and correct when needed. Know what you need to kick off the project. Check out this infographic from Wrike that offers some great tips on orchestrating a successful project kickoff.

3. Manage expectations — Ensure that the client has realistic expectations of the timeline, and their responsibility to achieve it. Maybe sales told them they're getting to the moon in 30 days, and you've got to step in and be the bad guy. It's better to take the hit early and recalibrate. Respect their time, be honest and forthcoming at the get-go. They surely have a lot to do on their side, and if they don't stay on track, the whole thing could push out and lose momentum. Make sure that is made clear.

4. Communicate often — Know who needs to know what and when. Schedule weekly calls with key stakeholders where you can review the status of the project and keep everyone informed. This may seem elementary, but teams get this wrong all the time. You or a project manager should send out regular progress emails so everyone knows what we're doing, what's next, who owns what and how we're doing against the timeline. Remember, keep the momentum up!

5. Escalate — If things are slipping, find out why and who's responsible, and take charge to get it back on track. If it's a client deliverable like a data file, or an internal ticket that's been hanging out too long, track it, know it, and communicate it quickly and urgently.

6. Track usage as soon as you can — This isn't just about log ins. If possible, keep close tabs on who's getting in there and what they're doing. Knowing how quickly the team is learning and adopting your product will guide you to proactively reach out to fill the gaps.

Take on your new customer with purpose and a plan. Shepherd them past the awkwardness of handoffs and uncertainty. Be the leader and the advocate through the implementation. Celebrate the wins. Realize for your customer the joy and value that they anticipated when they decided to work with you. If you get that right, they'll never want to leave.