

GUIDEcX's Ultimate Client Onboarding Guide for Beginners

Contents:

- **What is client onboarding?**
 - Why is it important?
 - How long does the client onboarding process take?
- **What makes a good client onboarding specialist?**
- **Preparing for onboarding success**
 - What does it look like when a client onboarding process is successful?
 - What produces this success?
 - How to set up for success: a pre-onboarding checklist (infographic)
- **Using onboarding templates**
- **Important client onboarding metrics to measure**
- **7 actions that delay or prevent onboarding success**

Many companies are creating a focus on client onboarding. Why? Because it has a big impact on your business. But if you're here, you probably already know that. This our ultimate client onboarding guide, made from the professionals themselves at the number one client onboarding software!

What is Client Onboarding?

Client onboarding is the experience a new customer or client has after purchasing your company's product or software system. That onboarding includes the introduction, training, and support throughout the process from purchase to implementation.

Why Is Client Onboarding Important?

Client onboarding is a pivotal process for many reasons. When it's done well, client onboarding helps new clients build trust and loyalty with their own customers. Established trust and loyalty will ultimately help that company grow their reputation and improve their bottom line. We all know that making a good first impression will strengthen a relationship. The same holds true for that onboarding process.

Overall, client onboarding is beneficial for both the sellers and buyers of a product or service. However, it's an often overlooked process. If an onboarding goes poorly, or if buyers feel like they're being neglected post-sale, there's a much higher risk they'll churn.

When companies focus on the client onboarding process (and invest in the automation-side with a client onboarding software), they can see these results:

- **4X increase in client onboarding specialist/project manager capacity**
- **49% average decrease in onboarding project time**
- **86% less meetings**
- **90% on-time delivery rate**

How Long Does the Client Onboarding Process Take?

The length of the client onboarding depends on your company and your customer. For most companies, the general time span can lay anywhere between sixty to ninety days. But since it depends, there can be some outliers where the process takes longer than that or even shorter.

[Click here for a complete onboarding schedule.](#)

What Makes a Good Client Onboarding Specialist?

Client onboarding is a pivotal process for many reasons. When it's done well, client onboarding helps new clients build trust and loyalty with their own customers. Established trust and loyalty will ultimately help that company grow their reputation and improve their bottom line. We all know that making a good first impression will strengthen a relationship. The same holds true for that onboarding process.

- Someone who's organized: During the onboarding process, there are a lot of things that need attention—just look at the metrics to measure below! Someone who's organized and attentive to detail will thrive in this environment.
- Someone who's strategically minded: [Strategic thinkers take control.](#) Time is valuable during the onboarding process, and client onboarding specialists understand this while thinking long-term. Create simple, customized to-do lists for your client
- Someone who's empathetically intelligent: As you know, most people don't always say how they feel. And when you're working with customers, understanding where they're at and how they feel is beneficial.
- Someone who's communicative: Communication for any relationship, especially business relationships, is key. Being communicative and transparent about the onboarding process is something that's invaluable and increases trust with your customers!

Preparing for Client Onboarding Success

What Does It Look Like When a Client Onboarding Process is Successful?

After a client completes the onboarding process with a company, they should have a complete understanding of how their newly integrated product or service works. Ideally, they invested in this product/service because it will have a positive impact on how they run their business.

What Produces this Success?

A few things contribute to the success of a client's onboarding process.

[Donna Weber](#), president of Springboard Solutions, has literally written [the book on how to effectively onboard new customers](#). She has become a long-time friend to our team over the years. We featured her in a [podcast](#) where she shared her insights on the neuroscience of client onboarding and these three factors to consider when onboarding new customers:

- 1) First Impressions: Making a good first impression can make you look professional, easy to talk to, and informational. It sets the tone for the entire onboarding process and can directly affect whether customers churn or renew. Read more about the importance of first impressions.
- 2) Alleviating Buyer's Remorse: 82% of buyers admit to feeling guilty after a past purchase, so it's best to assume buyer's remorse is inevitable. The best way to address it is to understand the customer's goals and make sure those goals and needs are being met throughout the onboarding process.
- 3) Considering Cognitive Closure: At the end of the onboarding process, it's important to review and reflect upon the process to see if it was successful. This final stage should help show the big picture and identify where the pieces fit.

How to Set Up For Success: A Pre-Onboarding Checklist

Sometimes, keeping track of all the items needed for a great onboarding process can be daunting. Here is a basic checklist for your pre-onboarding efforts to help prepare you and your team for success.

- **Onboarding schedule**
- **Kickoff meeting agenda**
- **Team outline**
- **Understanding what sold your customers on your product or service**
- **Onboarding resources**

Onboarding Schedule

- What milestones will you track?
- When can the onboarding expect to be done?
- When is your team going to check in during and after the onboarding?

Kickoff Meeting Agenda

- What do you need from your customer's team?
- What is your team going to do for them?
- [What are the short-term vs. long-term goals?](#)

Team Outline

- Who is everyone on your team?
- Who is everyone on your customer's team?
- Who's responsible for what?
- Preferred contact methods?

People who may be involved:

- Your internal onboarding or implementation teams
- Your customer's teams
- The salesperson who sold your customer
- Any third-party vendors/contractors who may be contributing

Understanding What Sold Your Customers

Your customer bought your product or service for at least one reason. There's something that sold them on it and you should show that highlight in your onboarding process.

This is where the sales-to-onboarding handoff comes in useful. The salesperson who sold your new customer to your company can have this information. Communicating with them and putting a process in place for future customers will help:

- Save time
- Help new customers see the results they want
- Create a better customer experience

Onboarding Resources

Any resources that would be helpful for your customer to move through the onboarding. Some of these things can include:

- Company introduction video
- Knowledge base articles
- Best practices and guides
- Product walkthroughs
- Contact list of the onboarding team

Save some time! Some of these items can be on a pre-client onboarding survey to help identify goals, preferred contact methods, job titles, who everyone is, etc.

Using Client Onboarding Templates

Client onboarding templates are a hot commodity. You can get them in a variety of different formats, from Word documents to Excel sheets and even within specific client onboarding softwares (like GUIDEx).

Templates are a great way to:

- Automate parts of the client onboarding process
- Identify patterns
- Make sure different types of clients are receiving the process that fits for them

Important Client Onboarding Metrics to Measure

How do you measure the success of client onboarding projects? Not only is measuring success about seeing how much revenue these onboardings bring in, but how their efficiency will last beyond the initial process.

As our CEO and Founder, [Peter Ord](#) says, “The costs associated with winning new customers — the customer acquisition costs (CAC) — are often well-documented since they involve ad campaigns and targeted marketing efforts. But retaining that customer lays the foundation for customer loyalty, and often the costs associated with client retention — essentially the ultimate goal of onboarding — go unchecked.” Until now.

Understanding What Sold Your Customers

- Trial conversion rate
- Onboard completion rate
- Customer response rate
- Customer adoption rate
- Customer churn rate

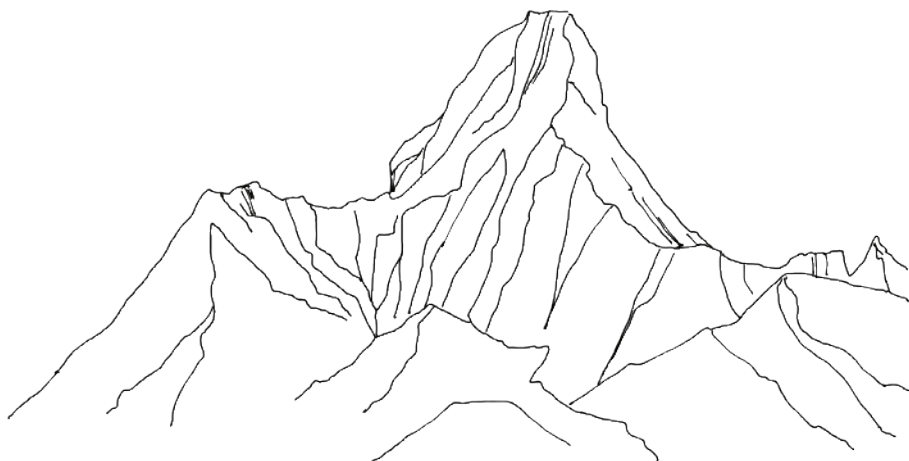
Learn more about [why these metrics are important and how to measure them](#). Or, simply refer to the infographic below.

7 Actions that Delay or Prevent Onboarding Success

You get one chance to make a good impression during the client onboarding process. Even if you make a stellar first impression during the start of the onboarding, if you don't provide a consistent experience and fall short, it can have a tremendous impact on your relationship with the client.

To keep customers excited and ensure that great first impression remains consistent, avoid these seven things.

1. Keeping secrets
2. Stealing time
3. Hiding your work
4. Forgetting to outline success
5. Relying on spreadsheets
6. Creating delays
7. Causing extra work



Ready to Take Client Implementation and Onboarding to the Next Level?

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