

THE ULTIMATE GUIDE TO CUSTOMER ONBOARDING



PICTURE THIS

You've just landed a new customer. Your entire team worked hard to get to this point, and so did your customer! They walked through the sales process, survived contract negotiations, and completed all the necessary security and legal reviews. Everyone involved feels a sense of relief and excitement.

And now, it's time to deliver on the claims your team made during the sales process. The customer can't know for sure that they made the right decision in signing the contract until they're actually using your product and seeing its value. The onboarding and implementation journey is where you'll either live up to everything your sales team promised or fail to deliver the value your customer expects.

If the onboarding process takes too long and feels disorganized or confusing, the customer will probably begin to doubt their decision to work with you. They may even start to look elsewhere before they've had the chance to use your product! In fact, 50% of all customer churn happens in the first 60 days of the new customer experience.



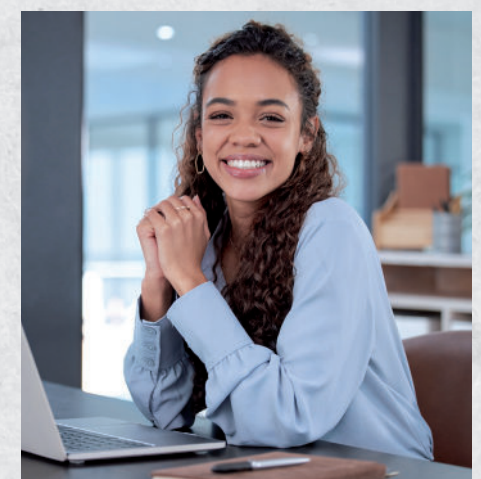
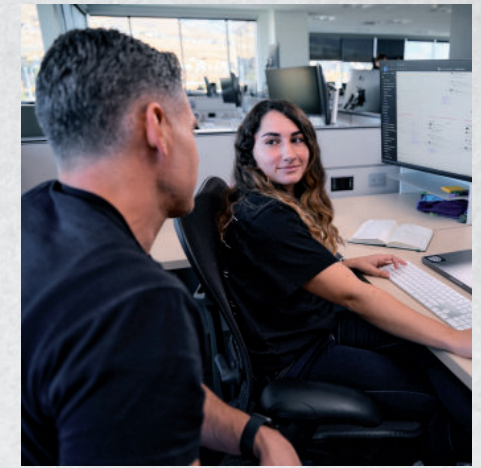
As you can see, onboarding is a critical time for your company and your customers. It's not enough to have a vague process for guiding your customers from the sales handoff to implementation. Rather, it's crucial to do everything you can to make the onboarding experience as positive, efficient, and effective as possible.

How efficient is *your* customer onboarding¹ process? Are you still relying on spreadsheets, meetings, offline conversations, and reminders to "circle back?" If so, it's time to move forward and replace those antiquated processes with modern customer onboarding tools² that leverage all the benefits of cutting-edge technology.

Are you ready to create a comprehensive, efficient onboarding process that saves time, reduces time-to-value, and improves customer experience? We've created this guide to help you do just that!

Within this guide, you'll find practical customer onboarding tips and applicable advice from our team. We've created a list of best practices you can follow in your own organization to optimize the customer onboarding process. Our goal is to help you navigate the complexities of customer onboarding so you can create a better experience for your team and customers.

Ready to get started? Let's begin by discussing exactly what customer onboarding is. Once you know what this encompasses (and what it doesn't), we'll look at ways to improve your onboarding process by incorporating automation, identifying and mitigating risks, and improving efficiency for everyone involved.

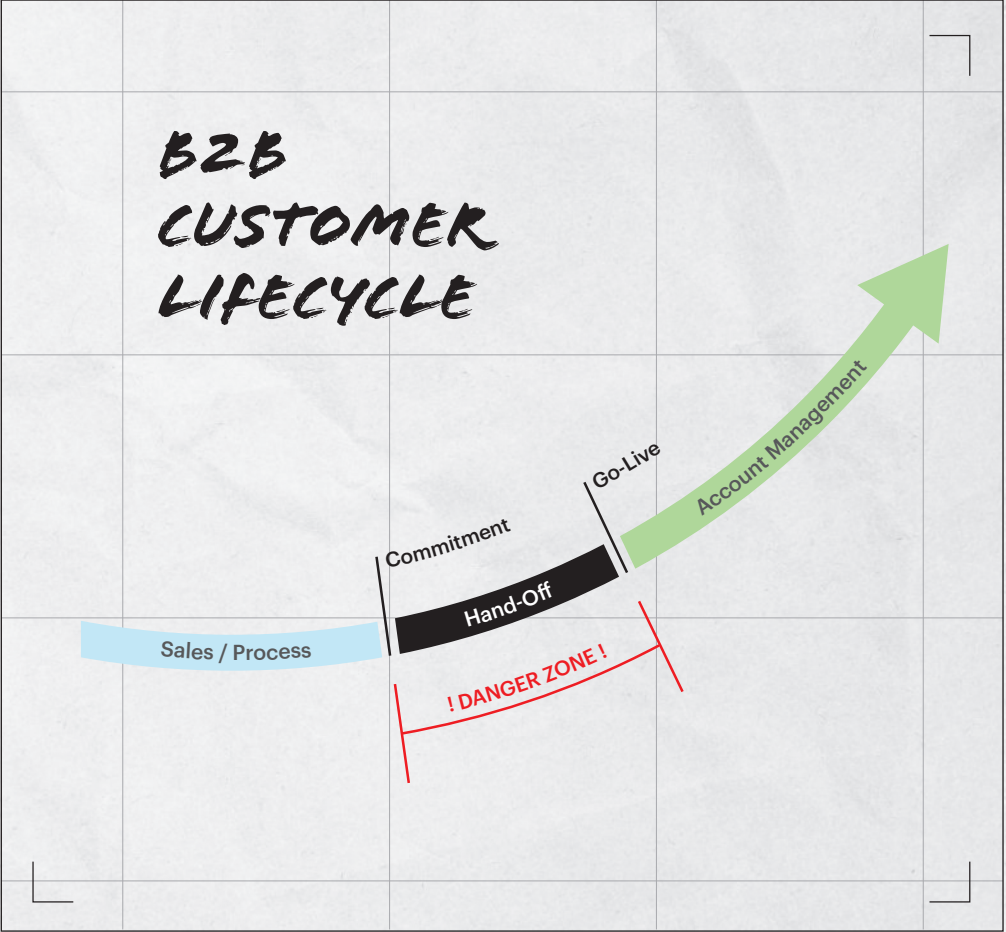


What is Customer Onboarding?

What exactly is customer onboarding? It's similar to the concept of onboarding a new employee. That process usually involves extending a job offer, bringing your new hire into the company system, and then training them on internal policies and procedures so they can start successfully doing the job you've hired them for.

Customer onboarding is similar; it's the process of getting your customers up and running with your product or services. For example, the customer onboarding process for a SaaS³ company may start by selling software to a new client. The next steps involve setting up the new customer's team in your system and providing them with all the training they need to use the software successfully.

The idea was to develop a solution that would create an organized and streamlined process to bridge the "danger zone" gap between the sales hand-off and the moment when the product goes live for the customer to use. GUIDEcx was developed to automate several aspects of the onboarding process and increase transparency to improve the experience for the customer and the company.



Why is Good Customer Onboarding so Important?

A streamlined, efficient onboarding process can improve customer retention. And retention is crucial; it's far more cost effective to keep an existing customer or employee than to find someone new. A poor onboarding experience is often the cause of customer churn, so it's essential to improve the process.



"Onboarding is the first impression that starts the path toward success or failure. This is your chance to light the spark that fans the flame that will turn into something great for many years to come."

– Harris Clarke
COO, GUIDEcx



Top Benefits of Good Customer Onboarding

A good onboarding experience is centered on efficiency and transparency. The idea is to give all stakeholders a streamlined experience throughout the entire process. Improving the onboarding process shortens time-to-value and delivers a strong ROI to your customers.

Furthermore, GUIDEcx's outstanding customer onboarding experience offers these benefits:

- More engagement with new users: 45% increase in client engagement⁴*
- Shorter time-to-value: 25% reduction in TTV⁵*
- Faster implementation: 49% reduction in onboarding time*
- Increased project manager capacity: 4x increase in project manager capacity*
- Fewer meetings: 86% fewer onboarding meetings*
- Increased growth capacity: 3x increase in growth capacity⁶*
- Fewer stressors for clients and team members: 75% decrease in customer onboarding tasks⁷*
- Reduced customer churn: 30% reduction in customer churn⁸ – Customer onboarding can help reduce annual customer churn by 30%*
- Consistent project completion: 90% on-time delivery rate when 5+ users are invited*

Your company's onboarding process drives your customers' success⁹, which increases retention and improves your brand's reputation in your industry.

So the question isn't whether you need an effective, efficient onboarding process; it's how to develop that process. We've condensed the process down to five key steps. Keep reading to get a detailed look at each of these steps and learn how to implement them to create the ultimate customer onboarding process.

Behind Every SaaS Project is a Human

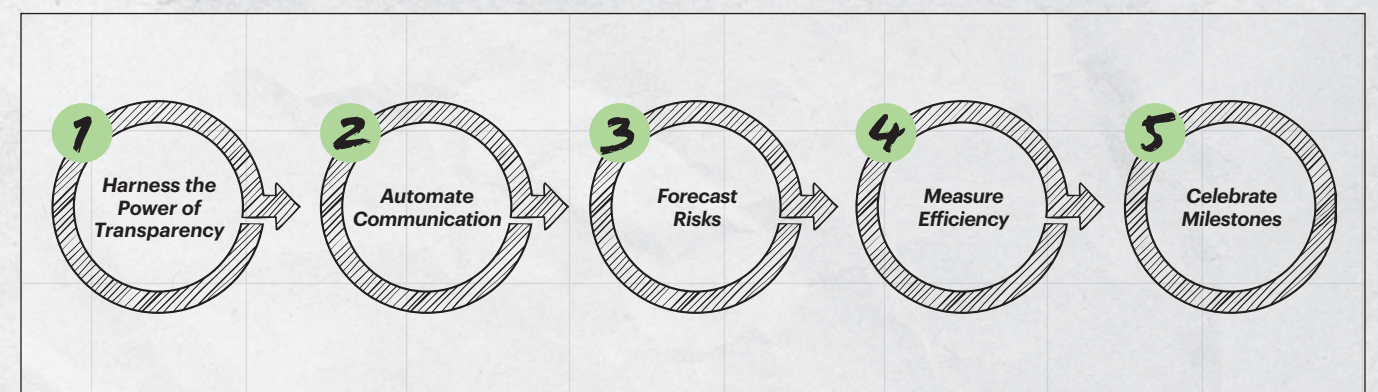
It's easy to get caught up in the day-to-day grind of managing projects and completing tasks. This is especially true during onboarding, when you're focused on finishing all the necessary steps to get your customer ready to start using your product or service.

But it's crucial to look beyond those tasks and project management¹⁰ headaches and remember that there's a human connection within **every project** you're working on. Embracing that human element gives you the perspective you need to improve your customer onboarding process; it's all about culminating and nurturing authentic relationships with your customers!

Good customer onboarding isn't just about creating an efficient process from a tactical perspective. It's also about modeling and molding human behavior that sets your team up for success and drives results.



5 Steps to a Successful Customer Onboarding Process



1 Harness the Power of Transparency

“Today with the rise of the internet/social media/online reviews companies are disproportionately rewarded when they provide a great customer experience and absolutely punished when they do not.”

– Ryan Smith
Qualtrics Founder

Transparency is a crucial aspect of a good onboarding process because it addresses one of the most common customer complaints: poor service. When clients don't have a complete view of the onboarding process, they often feel confused and forgotten as soon as the sales handoff begins. In fact, most customers (over 90%¹¹) believe that companies “could do better” during the onboarding process.

The sales team has spent time cultivating a solid relationship and providing the customer with all the information they need to make a decision. And the customer probably expects that level of communication and service to continue throughout the onboarding process.

But what often happens is that communication stalls or stops completely while the onboarding team works through their tasks. They may be working efficiently and keeping the onboarding process right on track, but the customer has no way of knowing that if communication isn't happening. From the customer's point of view, your team abandoned them and stopped providing excellent service as soon as the sale was made.

Transparency is the key to overcoming this common onboarding challenge. Develop a process that keeps your customers in the loop the entire time: from sales handoff to go live. A well-designed, transparent process ensures that every stakeholder has access to critical information, and it reassures customers that they are receiving the support they need to start using your product or service as quickly as possible.

Consider the entire experience you're providing to your clients. You developed a product or service to solve problems and make your customers' lives easier, but they won't get to experience all those benefits without a smooth, efficient onboarding process. **Give your customers an exceptional experience by asking these questions of your team:**

- What did your customer come to you for?
- Do you know the specifics of the solution they need?
- Are you giving them an experience that's focused on their needs?

By truly evaluating the answers to these questions, your team can develop strategies to improve the customer experience every step of the way.

2 Automate Communication

Communication is crucial during the onboarding process. Poor communication is one of the biggest issues that contributes to customer churn¹². If you aren't actively keeping your customers in the loop during onboarding, they'll probably think your team has forgotten about them. A new customer has no way of knowing what your team is doing to onboard them unless you offer them a window into the process.

Customer experience isn't the only reason to prioritize communication. Giving your clients updates and notifications ensures that they know when they have tasks to complete to move forward. The onboarding process can become extremely slow when customers are unaware that your team is waiting on them to complete paperwork and other tasks.



Of course, you might already know how important communication is in the onboarding process. But if you're relying on internal spreadsheets and emails to keep everyone updated, there's probably some information falling through the cracks. And if your team members have to manually send out updates, notifications, and task reminders to clients, you're losing valuable time that could be used more productively.

What's the solution? Automation. Automating communication reduces manual errors, closes communication gaps, and significantly increases efficiency. Clear, automated updates minimize confusion and ensure that everyone knows how tasks are assigned¹³ and when they should be completed.

Follow these steps to automate communications for your onboarding process:

- Utilize project templates
- Write clear task instructions
- Apply dependencies to tasks
- Establish timelines for each task
- Assign a deadline for each task
- Set up automated notifications for when tasks are assigned, completed, or delayed
- Create milestone notifications

Automated communications facilitate collaboration, increase efficiency, minimize confusion, and decrease escalations.

3 Forecast Risks

"Transparency seeds collaboration."

– John Doerr

Even the best-laid plans sometimes fail, and even a well-designed onboarding process will occasionally experience problems and delays. As such, it's crucial to find ways to forecast those risks and prepare to respond to them.

For example, if one of your team members has to take emergency leave, it might take a few extra days to reassign their tasks to other people in the onboarding team. This sort of delay isn't ideal, of course, but it's also not catastrophic **as long as you keep everyone informed.**

This is where transparency comes into play. By creating an organized onboarding process with strategic transparency, you can make sure that all stakeholders stay informed of changes and delays.

Yes, a customer may be slightly frustrated if onboarding gets delayed, but as long as you keep them informed, they can choose to be patient and understanding. If the customer doesn't get informed when delays happen, they're far more likely to become disillusioned and start looking for another potential provider.

Customer confidence is invaluable, especially during the onboarding phase. If your customers feel confident that your team knows what to do, they'll usually overlook minor delays. Your goal is to identify potential issues that could crop up during onboarding and proactively develop plans to address and resolve them. When you have a plan in place, your customers can feel secure in your team's ability to handle challenges and keep everyone moving toward the goal.

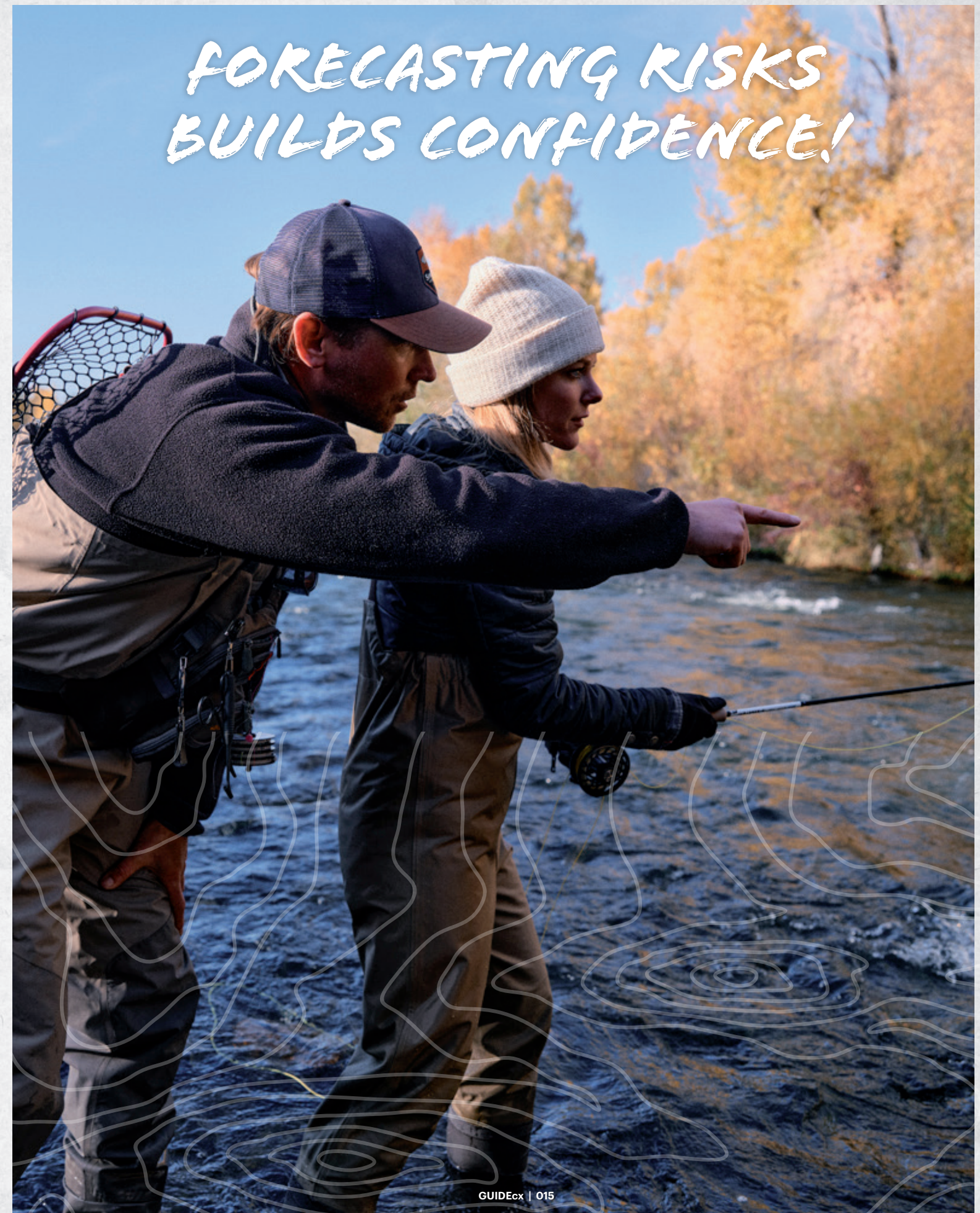
So what does risk forecasting look like in practice? Here are some of the elements to consider:

- Project templates**
 - Create templates that can be customized for each customer*
- Clearly defined tasks that include vital information**
 - Estimated time to complete a task*
 - Dependencies*
 - The person assigned to complete the task*
- Automated communications**
 - Including updates, notifications, and reminders*
- Robust reporting that covers essential details**
 - Projects ahead of schedule*
 - Projects at risk*

Good Onboarding vs. Great Onboarding

A good onboarding experience is based on process, but an excellent onboarding experience is driven by insights. Remember, the goal of onboarding is to get your customers from Point A (the sales handoff) to Point B (fully up and running with your product). This process should run like a well-oiled machine, and insights are the keys to making that happen.

First, ensure that your team is paying attention throughout the process and watching for feedback. The goal is to use those insights to inform future decisions. Next, take the time to read the reports and dig into the data to identify trends. This is an effective way to identify and mitigate risks as they arise.



4 Measure Efficiency

Efficiency is a crucial aspect to consider when evaluating your customer onboarding process. An efficient process reduces time-to-value and eliminates tedious, unnecessary tasks, significantly improving the customer experience. GUIDEcx helped MaidCentral reduce customer onboarding tasks by 75% and shorten TTV by 25%¹⁴.

“The efficiency that we see from the GUIDEcx software is incredible. We get so much value from all of the reporting, tools, communications cadence, automation, and integrations. Without this software, we couldn’t do what we do.”

– Austin Allen
Partner Implementation Supervisor, MaidCentral

Customers aren’t the only ones who benefit from a more efficient onboarding process. Improving efficiency also reduces the workload for your team, expanding their capacity to serve even more customers effectively. When Kount implemented GUIDEcx, the platform increased the implementation team’s capacity for customer integrations by 40%¹⁵.

“With GUIDEcx, we have more data. We can easily identify our problem areas. Growing and maturing isn’t intimidating or overwhelmingly challenging.”

– Brooke Cantwell
Kount

After implementing GUIDEcx, Maxio experienced a 30% decrease in onboarding time and a 40% increase in capacity. Additionally, 20% more tasks were automated¹⁶.

“How did we even do this before GUIDEcx? We didn’t know where the projects were. I didn’t have that visibility. Being able to pull that data in [has] made it a lot easier for me. It’s made it easier for the implementation team. It’s made the customer experience so much better.”

– Paul Ventresca
Director of Implementations, Maxio

So, how efficient is your onboarding process? If you don’t know, you can’t find ways to make it better.

“A brand must start measuring efficiency in order to improve it. If you are currently measuring your onboarding efforts, you can start to do exciting things. If you’re not, start right away.”

– Harris Clarke
COO, GUIDEcx



Reporting gives you the critical information you need to understand exactly what's happening during the process. With this insight, you can develop an accurate picture of your implementation process and identify areas where you can address challenges and further improve workflows.

Here are some of the questions to ask about efficiency¹⁷:

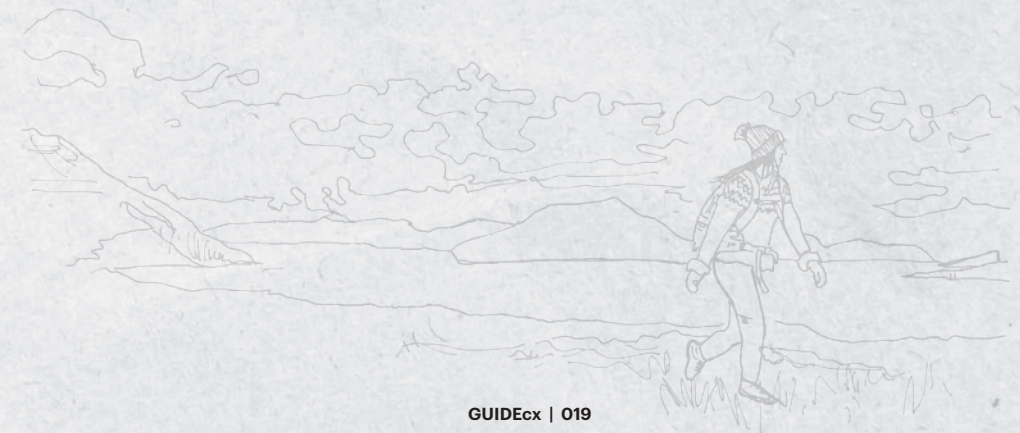
- On average, how long does the customer onboarding process take?*
 - Measure by milestones, products, and customer types*
 - Identify any outliers and mark them for further analysis*
- How many projects are delivered on time?*
- How many projects are delayed?*
- Which team member generates the highest customer satisfaction?*
- Which team member shows low satisfaction rates?*
- How much does it cost you to onboard a new customer?*

These are just a few of the crucial questions to ask. Depending on the specifics of your company and customers, there may be other questions to ask to evaluate onboarding efficiency.

Asking the questions isn't enough; you must answer them as well. This is where reporting can help. The more data you can gather, the better you'll be able to understand how the onboarding process is working for your team and your customers.

There are many ways to gather data for analysis. A great place to start is by installing internal and external surveys in your process. Basing these surveys on milestones simplifies the timing and ensures that you'll always get data from customers at the same points in onboarding. Measuring customer satisfaction at regular intervals gives you the opportunity to make adjustments as quickly as possible.

What does it actually look like to evaluate efficiency? Here are some critical metrics to consider.



Customer Onboarding KPIs

Customer Retention Rate

This measures the number of clients that you've onboarded who are still part of your customer base.

$$\text{CUSTOMER RETENTION RATE} = \frac{\text{REMAINING \# OF ONBOARDING CUSTOMERS}}{\text{INITIAL \# OF ONBOARDING CUSTOMERS}}$$

Engagement Rate

This number indicates the number of users who are actively engaged in your product or services over a defined period of time.

$$\text{ENGAGEMENT RATE} = \frac{\text{ACTIVE USERS IN A GROUP}}{\text{TOTAL USERS IN A GROUP}}$$

Customer Satisfaction

This metric is also known as a net promoter score, and you get it from asking your customers to rate your customer service based on how likely they are to recommend you. Most companies use a 1-to-10 scale and classify the results this way:

1-6 are Detractors

7-8 are Passive

9-10 are Promoters

Once you have those numbers, you can calculate the net promoter score.

$$\text{NET PROMOTER SCORE} = \% \text{ OF PROMOTERS} - \% \text{ OF DETRACTORS}$$

Time-to-Value

TTV is one of the most important aspects of the onboarding process. This term refers to the period of time between the start of the onboarding process and the time at which the customer first experiences the value of your product or service. In other words, it's the moment when a customer realizes the return on their investment. You should find ways to shorten the TTV as much as possible to reduce buyer's remorse and customer churn.

$$\text{TIME TO VALUE} = \text{ONBOARDING START DATE} + \text{DATE OF ACHIEVED VALUE}$$

Net Revenue Retention

NRR indicates the percentage of revenue retained from current customers during a defined amount of time.

$$\text{NET REVENUE RETENTION} = \left(\frac{\text{MRR at the Beginning of the Period} + \text{Business Expansion Revenue} - \text{Canceled MRR} - \text{Downgraded MRR}}{\text{MRR at the Beginning of the Period}} \right) \cdot 100$$

Trial Conversion Rate

This measures the percentage of sales converted via trials.

$$\text{TRIAL CONVERSION RATE} = \frac{\text{NUMBER OF CONVERSIONS DURING THE LAST 30 DAYS}}{\text{NUMBER OF COMPLETED TRIALS DURING THE LAST 30 DAYS}} \%$$

Average Onboarding Completion Duration

This number represents the amount of time it takes a new customer to transition from the onboarding phase to being fully operational.

$$\text{AVERAGE ONBOARDING COMPLETION DURATION} = \frac{\text{TOTAL NUMBER OF ONBOARDING DAYS FOR ALL CLIENTS}}{\text{NUMBER OF CLIENTS}} \%$$

Customer Adoption Rate

You can quantify the effectiveness of your onboarding process by measuring how frequently customers use your product.

$$\text{CUSTOMER ADOPTION RATE} = \frac{\text{NUMBER OF ACCOUNT LICENSES PURCHASED}}{\text{NUMBER OF UNIQUE DAILY LOGINS}} \%$$

Customer Churn Rate

This is a critical metric that identifies the number of customers who bought your product and then left your company.

$$\text{QUARTERLY CUSTOMER CHURN RATE} = \frac{\text{TOTAL NUMBER OF CUSTOMERS LOST IN THE PREVIOUS QUARTER}}{\text{NUMBER OF CUSTOMERS THAT YOU STARTED WITH}} \%$$

All of these metrics give you insight into your onboarding process and the overall customer experience. Use them to identify areas for improvement, and regularly look at them to see whether the changes you make are helping.



5 Celebrate Milestones

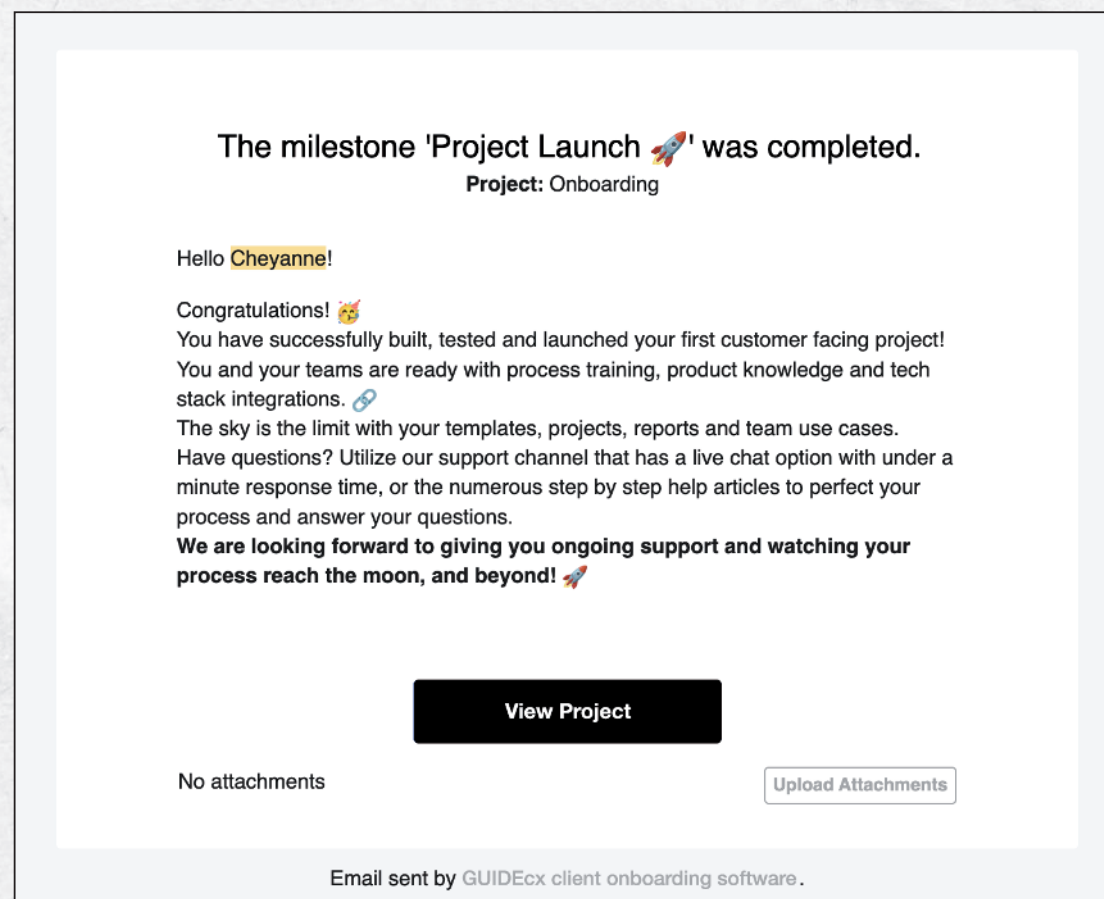
The last part of creating the ultimate customer onboarding process is celebrating milestones. Remember, every team is made up of humans, and it's essential to honor that human element as much as possible.

Customer experience is a critical aspect of a successful onboarding process. And when you take the time to identify and celebrate wins, it improves the customer experience by showing them that your company truly cares about their success.

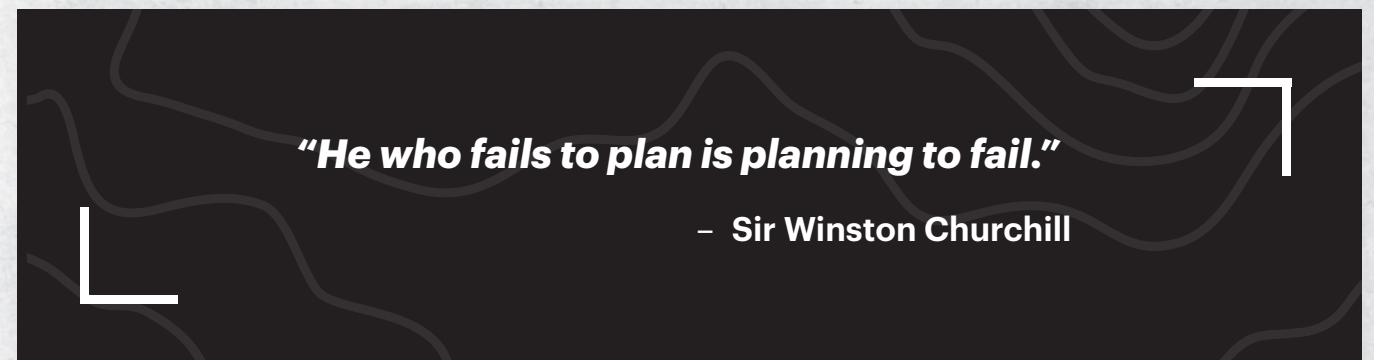
This is another aspect of onboarding where automation shines. Set up automated communications for reaching milestones and completing major tasks. Ideally, you should incorporate all stakeholders when you celebrate milestones. It's just as easy to send a celebration email to your customer as to an individual team member.

These automated messages don't have to be long or complicated, but they should be personalized. Just include a quick note celebrating the accomplishment and thanking the recipient for their work is all you really need. Everyone likes to be appreciated, including your customers. Celebrating progress can be a significant aspect of your customer's overall onboarding experience.

Here's a sample of an automated celebratory email:



Set Your Team and Your Customers Up for Success



Onboarding is your first chance to show new customers all the benefits they'll experience by working with you. It's imperative to do everything you can to create a customer onboarding process that's streamlined, efficient, and transparent.

It's not enough to just have a step-by-step process for your team to follow; you need to keep everyone (including your customers) updated and aware of their responsibilities. By increasing transparency and improving communication, you can ensure that your team members and customers have an exceptional experience.

Use this checklist to prepare for a successful onboarding experience:

- Define and learn the customer onboarding process from start to finish*
- Confirm your desired outcomes and share them with your team*
- Identify key stakeholders and what they need*
- Find opportunities to add more context and increase transparency*
- Make sure the information hierarchy is correct*
- Develop supporting materials for your team and customers*
- Establish a detailed training timeline and assign tasks to your team and customers*
- Give access to key stakeholders*
- Create and share templates*
- Confirm your integrated partnerships*
- Leverage reporting to identify and mitigate bottlenecks in the process*
- Solicit feedback from clients so you can address their concerns as quickly as possible*
- Schedule an onboarding debrief meeting to cover lessons learned*

Serving your customers well is about more than just creating exceptional products and services for them. It's also about giving them an outstanding experience every time they interact with your team. And onboarding is your first opportunity to showcase all the benefits of your company.

A new customer will compare their onboarding experience with everything they were promised by the sales team. They want a smooth transition that allows them to start using the product they paid for as soon as possible. It's your job to develop and guide that transition so a new customer has all the information and support they need to enjoy all the benefits of your product.

An excellent customer onboarding experience doesn't just happen. It requires your company to develop a comprehensive process, identify potential issues, and mitigate them. And the whole process should be as transparent and efficient as possible. By following the steps in this guide, you can build a solid customer onboarding process that ensures the best experience for your customers and your team.

At GUIDEcx, we help companies give their customers an outstanding onboarding experience that upgrades builds trust, reduces churn, and shortens time-to-value. Want more information about the GUIDEcx customer onboarding solution? [Book a demo today!](#)

APPENDIX

¹ Customer Onboarding, <https://www.guidecx.com/solutions/customer-onboarding/>

² Modern Customer Onboarding Tools, <https://www.guidecx.com/products/how-it-works/>

³ SaaS, <https://www.guidecx.com/industries/saas/>

⁴ 45% Increase in Client Engagement, <https://www.guidecx.com/resource-center/case-studies/quentelle-sees-45-increase-in-client-engagement-after-implementing-guidecx/>

⁵ 25% Reduction in TTV, <https://www.guidecx.com/resource-center/case-studies/maidcentral-switches-to-guidecx-cuts-onboarding-tasks-for-clients-by-75-with-guidecx/>

⁶ 3x Increase in Growth Capacity, <https://www.guidecx.com/resource-center/case-studies/catchafire-triples-their-growth-capacity-with-guidecx/>

⁷ 75% Decrease in Customer Onboarding Tasks, <https://www.guidecx.com/resource-center/case-studies/maidcentral-switches-to-guidecx-cuts-onboarding-tasks-for-clients-by-75-with-guidecx/>

⁸ 30% Reduction in Customer Churn, <https://www.guidecx.com/solutions/>

⁹ Customers' Success, <https://www.guidecx.com/role/customer-success-teams/>

¹⁰ Project Management, <https://www.guidecx.com/solutions/project-management/>

¹¹ Over 90%, <https://www.wyzowl.com/customer-onboarding-statistics/>

¹² Customer Churn, <https://www.guidecx.com/solutions/customer-churn/>

¹³ Tasks are Assigned, <https://www.guidecx.com/solutions/task-management-software/>

¹⁴ Reduce Customer Onboarding Tasks by 75% and Shorten TTV by 25%, <https://www.guidecx.com/resource-center/case-studies/maidcentral-switches-to-guidecx-cuts-onboarding-tasks-for-clients-by-75-with-guidecx/>

¹⁵ Capacity for Customer Integrations by 40%, <https://www.guidecx.com/resource-center/case-studies/kount-cuts-onboarding-and-increases-capacity/>

¹⁶ 20% More Tasks were Automated, <https://www.guidecx.com/resource-center/case-studies/maxio-cuts-six-weeks-off-their-onboarding-time-with-guidecx/>

¹⁷ Efficiency, <https://www.guidecx.com/solutions/maximize-your-customer-onboarding-efficiency/>



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