5 Steps to Successful Customer Onboarding

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5 Steps

- Decide on your onboarding MODEL
- Identify onboarding MILESTONES
- Use the right MODALITIES
- MARKET your training
- Consider your METRICS
- Q&A
Why Is Onboarding Important?

Leading Causes of Churn

- Poor Onboarding: 23%
- Weak Relationship Building: 16%
- Poor Customer Service: 14%

(source: Preact)
Customers Have Choices

COMCAST → YouTubeTV → hulu → prime video
“Your customers expect you to make them wildly successful.”

Customer Success: How Innovative Companies are Reducing Churn and Growing Recurring Revenue, by Nick Mehta, Dan Steinman, and Lincoln Murphy
Step 1

Define your Onboarding Model

What is your customers’ path to success?
THE SELF-SERVE.

SIMPLE PRODUCT

HIGH-TECH USERS

B2C/DEV TOOLS
THE LOW-TOUCH.

MID-COMPLEXITY PRODUCT + MILD FRICTION/ADOPTION + SMALL TO MEDIUM BUSINESSES
THE HIGH-TOUCH.

COMPLICATED PRODUCT + HIGH-TOUCH USERS + ENTERPRISE LEVEL
Step 2
Identify Onboarding Milestones

What is your customers’ path to success?
Goal: Get Customers to Value

Identify
Key milestones in the customer onboarding journey
Goal: Get Customers to Value

Handoff
Sales team passes an account and all notes over to our customer success team

Kickoff
All stakeholders meet to plan implementation

Soft Launch
Training gets released to a test group

Launch
General release
**Goal: Get Customers to Value**

*Discovery*

With relevant stakeholders:

What are successful customers doing?
What About Content? - 3 Rules

1. Build content that teaches to your milestones.

2. Frame it that way for the customer.

3. If it’s not directly related to getting a customer to initial value, it’s not in your MVP (minimum viable product).
# Content Planning Map

<table>
<thead>
<tr>
<th>Knowledge or Skill</th>
<th>Prerequisite Knowledge</th>
<th>Existing Content</th>
<th>New Content Needed</th>
<th>Subject Matter Expert</th>
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</thead>
<tbody>
<tr>
<td>What do students need to be able to do or know to accomplish their goal?</td>
<td>What information do they need in order to do this?</td>
<td>What content do you already have at your disposal to teach to this?</td>
<td>What new content will you have to make?</td>
<td>Who can you ask for help?</td>
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<tr>
<td>Building a Course</td>
<td>Creating Sections</td>
<td>Help Article</td>
<td>Video</td>
<td>Molly</td>
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<td>Instructional Design Principles</td>
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</table>
Step 3

Pick Your Learning Modalities

Optimize the student experience
How do you deliver your customer education during onboarding?

• Classroom/in-person training
• 1:1 V-ILT
• 1:many Virtual Instructor Led Training (V-ILT) - webinars
• On-demand digital learning content
• Help articles
• Other ways?
Classroom Training

- High touch
- Structured
- Costly
- Limited access
1:1 V-ILT

- High touch
- Personalized
- Costly
- Hard to scale
1:Many V-ILT

- Cuts down on expenses
- Accessible
- Limitations around interactivity & timing
Help Documentation

- Inexpensive
- Reactive
- No interactivity
- Hard to curate
80% of extended enterprise training is still done in person
(source: Brandon Hall)

Customers are asking for more digital learning content
(source: TSIA)
Tying it all Together

Holistic Training
Ecosystem
Step 4

Market Your Onboarding Program

Drive students to your onboarding program
Do you charge for training?

- Always
- Sometimes
- Never
- Not yet
Should we charge for training?

Reasons to Offer Free Training

- Few public resources
- Faster time to value
- Reduced support tickets
Should we charge for training?

Reasons to Offer Paid Training

- Advanced offerings
- High-touch training
- Certifications
- Content updates
Marketing Resources

Do you have?

- Access to marketing ops?
- Integrations with marketing systems?
- A marketing strategy?
Salesforce Integration

• Increased student urgency

• Trigger Marketo drip campaigns
Step 5

Consider Your Metrics

How can you demonstrate the value of training?
Develop SMART Goals

- Specific
- Measurable
- Achievable
- Relevant
- Time-bound
Establish Baseline Metrics

- Product adoption
- Customer churn & renewals
- Registrations & completions
Key Takeaways

Step 1: Define your MODEL
Step 2: Identify MILESTONES
Step 3: Use the right MODALITIES
Step 4: MARKET your training
Step 5: Consider your METRICS