Onboarding as the Foundation for Customer Success
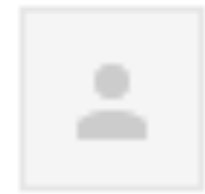
Sandi Lin

CEO
Skilljar

Fwd: who can I call?

5/16/16

to . ___ , sandi

please see below....apparently ___ is out of town.....I would like to get started.....at least understand next steps...

thanks. Bill

---------- Forwarded message ----------
From: ___
Date: Mon, May 16, 2016 at 3:49 PM
Subject: who can I call?
To: ___

I want to get started...

I'm not happy that I have gone an entire day without hearing from anyone....

que pasa?

Bill

ONBOARDING

when expectations meet reality

Poor onboarding is the most frequent cause of churn (23%)!

Followed by:
- *Product underperforms (20%)*
- *Ineffective relationship building (15%)*
- *Overselling (14%)*

What we'll cover today

1. Establish three customer onboarding models

2. Define milestones and measurement

3. Identify effective tactics for success

- **Founded in 2013**

- **Customer onboarding and education**

- **VP CS <25 hire**

What is your primary customer onboarding model?

Self-service

Low Touch

High Touch

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High Touch

- Simple product
- Very high volume of users
- Freemium or low ACV
- B2C, Dev tools

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- Mild complexity
- Varied use cases
- Some friction in adoption
- SMB, small team users

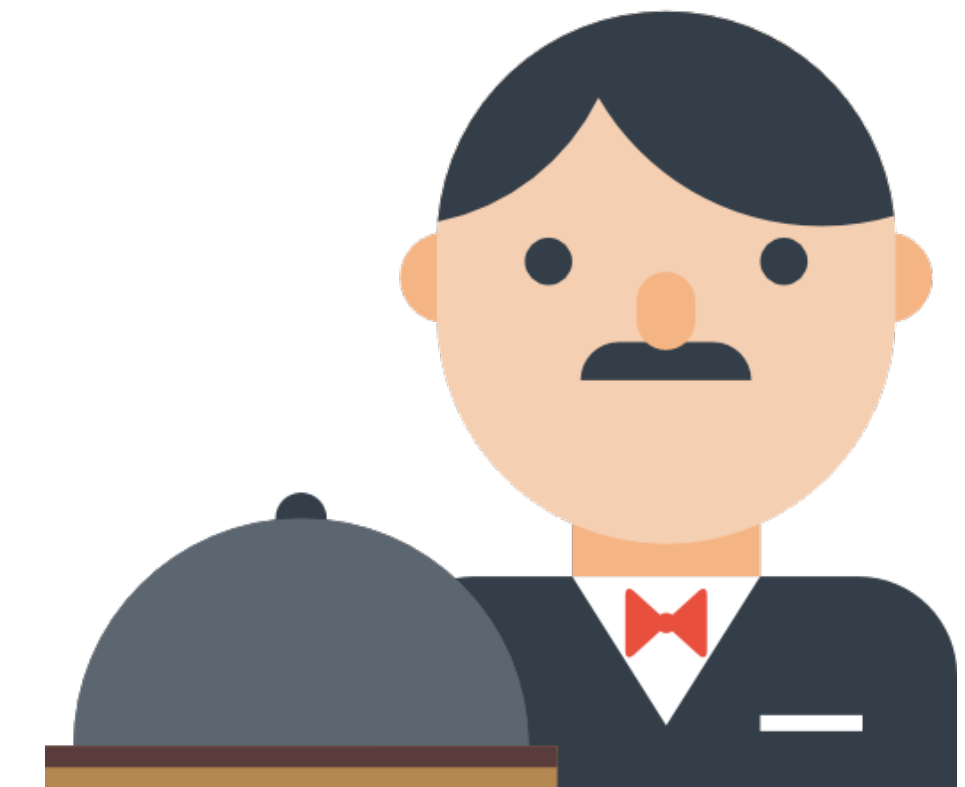# What is your primary customer onboarding model?

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Low Touch

- Mild complexity
- Varied use cases
- Some friction in adoption
- SMB, small team users

High Touch

- New product/behaviors
- Extensive implementation
- Many stakeholders involved
- Enterprise users

Milestones and measurement

Phase	Handoff
Activities	• AE completes handoff form • CSM assigned • AE intro's CSM to customer
Time post CW	1 day
Measured by	• Customer entered into ClientSuccess • Date entered

▼ **Sales Handoff** (3)

  ▼ **Internal Operations Tasks** (6)

  Scheduled internal Opportunity meeting with Sales & AM

  Completed internal Opportunity meeting

  Created Skilljar Org

  Created new Zendesk Org

  Added Contacts, License Package, and Success Package to Client Success

  Attached contract to Client Success

Milestones and measurement

skilljar

Phase	Handoff	Kickoff
Activities	• AE completes handoff form • CSM assigned • AE intro's CSM to customer	• Call with key stakeholders • Confirm goals and strategy • Review onboarding plan
Time post CW	1 day	7 days
Measured by	• Customer entered into ClientSuccess • Date entered	• Kickoff call held • Date entered

Milestones and measurement

Phase	Handoff	Kickoff	Soft Launch (Beta)
Activities	• AE completes handoff form • CSM assigned • AE intro's CSM to customer	• Call with key stakeholders • Confirm goals and strategy • Review onboarding plan	• Training content review (beta testers) • User experience works as desired • Review data and integrations
Time post CW	1 day	7 days	30 days
Measured by	• Customer entered into ClientSuccess • Date entered	• Kickoff call held • Date entered	• Customer confirms OR product usage • Date entered

Milestones and measurement

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Phase	Handoff	Kickoff	Soft Launch (Beta)	Launch
Activities	• AE completes handoff form • CSM assigned • AE intro's CSM to customer	• Call with key stakeholders • Confirm goals and strategy • Review onboarding plan	• Training content review (beta testers) • User experience works as desired • Review data and integrations	• Customer markets launch to arms-length users • Migration complete (optional)
Time post CW	1 day	7 days	30 days	60 days
Measured by	• Customer entered into ClientSuccess • Date entered	• Kickoff call held • Date entered	• Customer confirms OR product usage • Date entered	• Customer confirms OR product usage • Date entered

Effective tactics for success

Self-service

Low Touch

High Touch

- Product exploration
- Email messaging
- Knowledge bank

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Plus:
- On-demand training
- In-app guidance
- Community
- 1-many webinars

High Touch

Effective tactics for success

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High Touch

Plus:
- Instructor led training
- Implementation team

ACCOUNTS
≠
USERS

Takeaways

1. Poor onboarding is the leading cause of churn
2. Three customer onboarding models - self-service, low touch, and high touch
3. Define your milestones and measurement
4. Choose tactics aligned with your onboarding model
5. Remember that onboarding is a continuous process

THANK YOU!

Customers don't expect you to be perfect.
They do expect you to fix things when they go wrong.

DONALD PORTER

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