



# DONNA WEBER

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FOUNDER & CEO  
SPRINGBOARD SOLUTIONS



## **Onboarding, Onboarding, Onboarding**

*Why Continuous Customer Onboarding  
is Critical for Your Organization*



# Agenda

- What is onboarding?
- Onboarding accounts vs users
- Ongoing onboarding
- Next steps

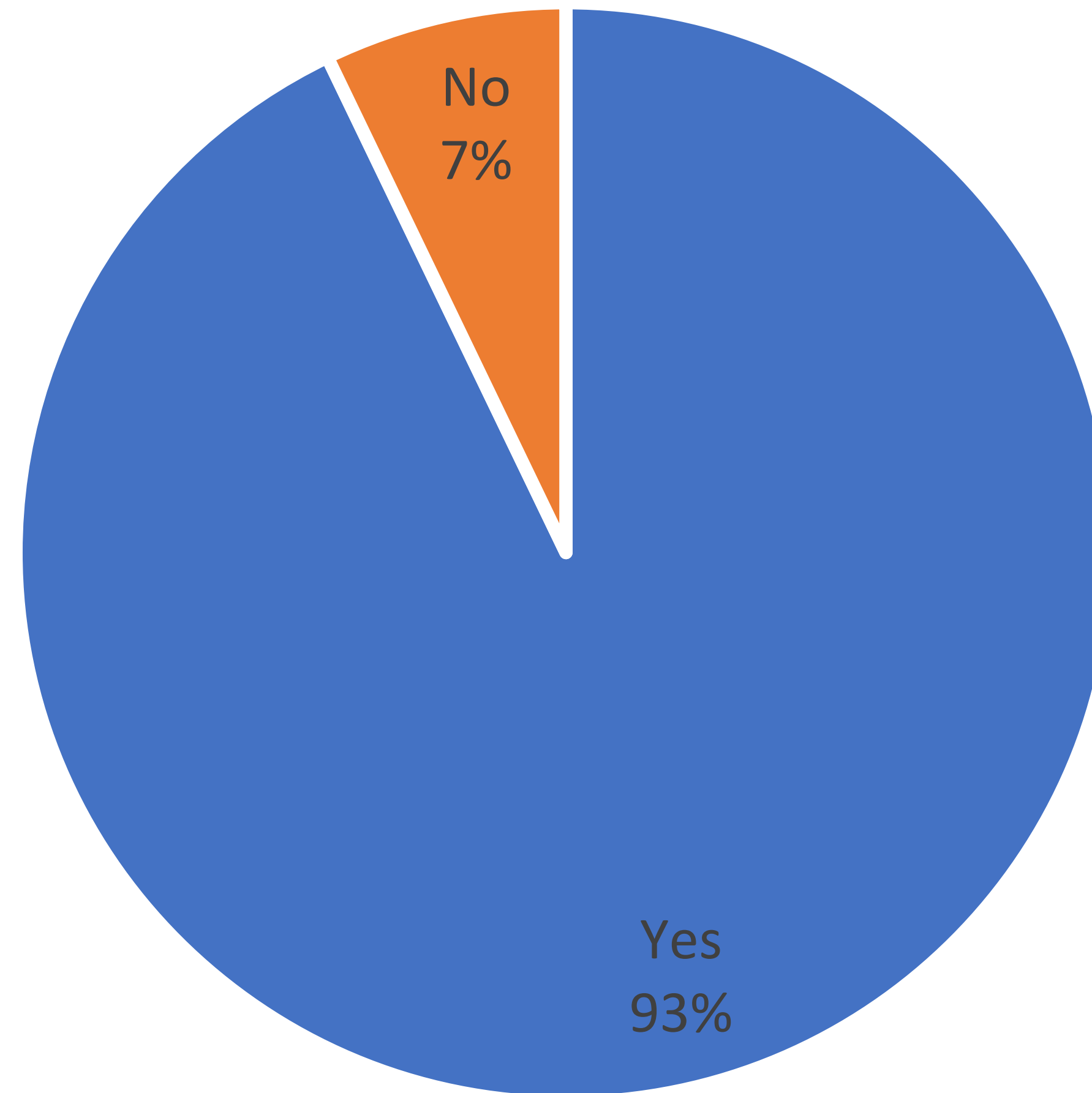
A background network diagram consisting of numerous nodes (circles) of varying sizes and colors (dark blue, grey, light blue) connected by thin lines, forming a complex web. The nodes are distributed across the frame, with a higher density in the upper right and lower left corners.

# What is onboarding?

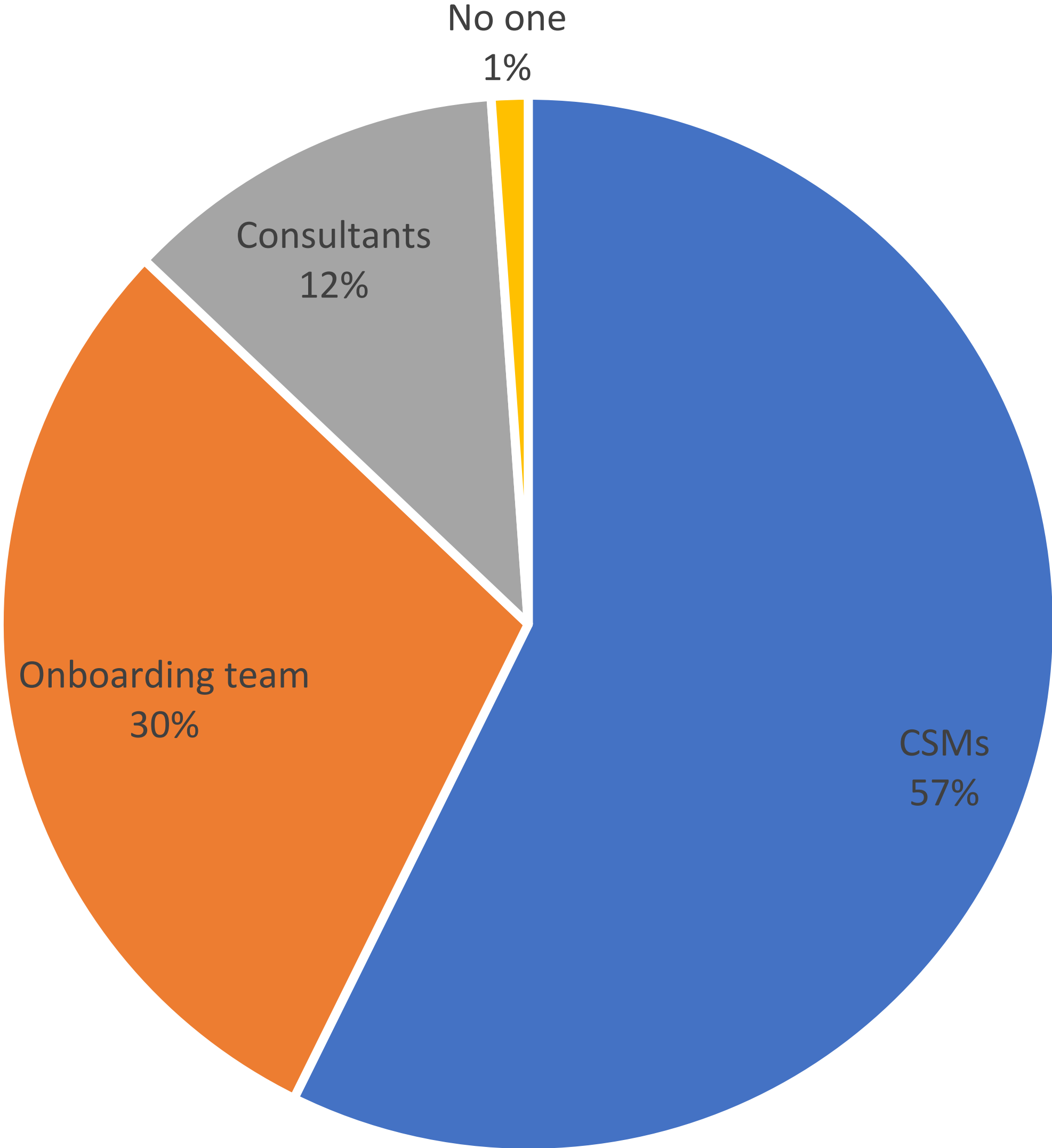
# Onboarding

The action or process of familiarizing new customers with your products & services

Do you have a process to familiarize new customers with your products & services?



# Who delivers onboarding?



# Orchestrated

Organizing & planning something that is complicated to achieve a desired or maximum effect



# The Orchestrated Onboarding Framework

					
<b>Pre-Sales</b> <ul style="list-style-type: none"><li>• Sell &amp; market CS value</li><li>• Set expectations</li></ul>	<b>Handoffs</b> <ul style="list-style-type: none"><li>• Internal handoff</li><li>• Customer handoff</li></ul>	<b>Kickoff</b> <ul style="list-style-type: none"><li>• Kickoff meeting</li><li>• Success plan</li><li>• Quick wins</li><li>• Schedule review</li></ul>	<b>Implement</b> <ul style="list-style-type: none"><li>• Training</li><li>• Services</li><li>• Go live</li><li>• Adoption</li></ul>	<b>Review</b> <ul style="list-style-type: none"><li>• Measure outcomes</li><li>• Wins &amp; feedback</li></ul>	<b>Ongoing</b> <ul style="list-style-type: none"><li>• New users</li><li>• New products</li><li>• New orgs</li><li>• Product updates</li></ul>

A background graphic consisting of a network of interconnected nodes and lines. The nodes are represented by small circles in various shades of blue, grey, and white. The lines are thin and grey, creating a complex web of connections. The overall aesthetic is clean and modern, typical of a corporate or technical presentation.

# **Onboarding accounts versus users**

# Onboarding new accounts



## One-off events

Customizing & branding your product



## Implementation & integrations

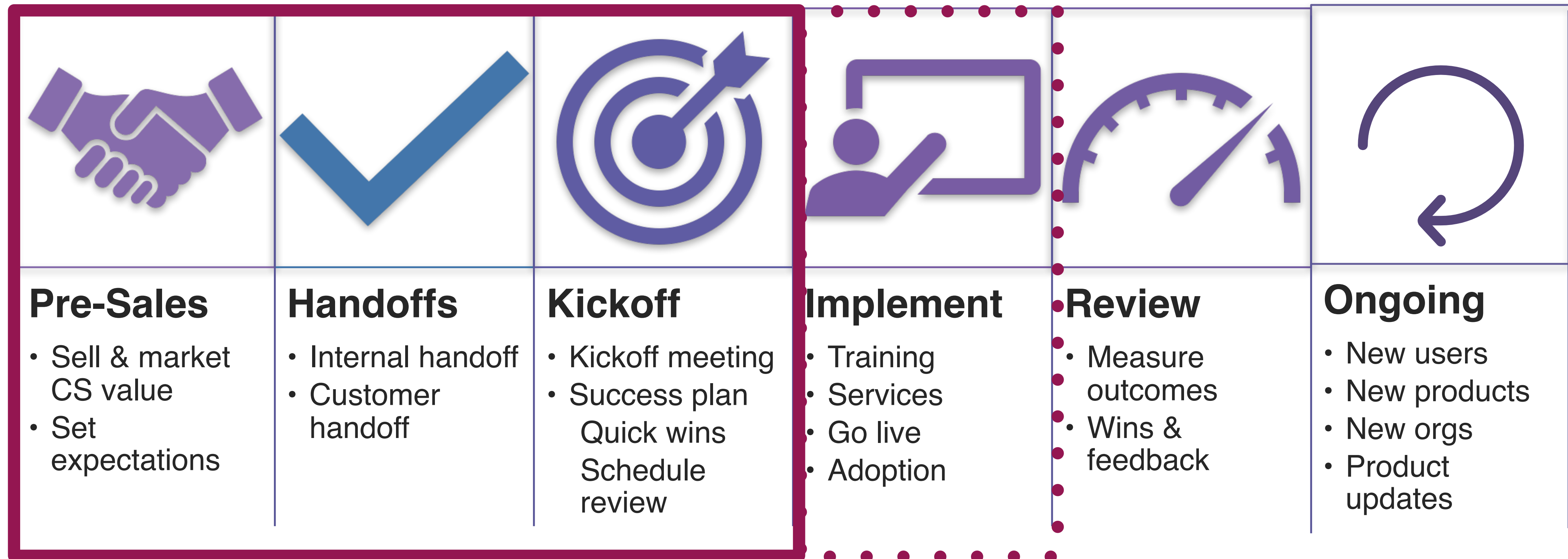
Connecting systems & data



## Go live

Launching product for users

# The Orchestrated Onboarding Framework





# Onboarding users

A woman with long blonde hair is smiling broadly while looking at a tablet computer. The image has a blue tint and a semi-transparent white text overlay.

**“When customers adopt quickly,  
they renew forever”**

~ Mark Ralls, Vista Equity

**13%** user turnover / year

**100** users

**13-25** users leave  
this year



A background network diagram consisting of numerous nodes (circles) of varying sizes and colors (dark blue, light blue, grey) connected by thin lines, forming a complex web. The nodes are distributed across the frame, with a denser cluster in the upper right and another in the lower left.

# What is ongoing onboarding?



# Ongoing Onboarding

A hand holding a pen over a laptop screen, with a staircase-like graphic overlaying text boxes. The background is a blurred image of a person in a blue shirt working at a computer. The text boxes are arranged in a descending staircase pattern from top-left to bottom-right.

New users in existing accounts

Existing product updates

New products

New organizations within existing accounts

Phases of customer maturity

# The Orchestrated Onboarding Framework

					
<b>Pre-Sales</b> <ul style="list-style-type: none"><li>• Sell &amp; market CS value</li><li>• Set expectations</li></ul>	<b>Handoffs</b> <ul style="list-style-type: none"><li>• Internal handoff</li><li>• Customer handoff</li></ul>	<b>Kickoff</b> <ul style="list-style-type: none"><li>• Kickoff meeting</li><li>• Success plan</li><li>• Quick wins</li><li>• Schedule review</li></ul>	<b>Implement</b> <ul style="list-style-type: none"><li>• Training</li><li>• Services</li><li>• Go live</li><li>• Adoption</li></ul>	<b>Review</b> <ul style="list-style-type: none"><li>• Measure outcomes</li><li>• Wins &amp; feedback</li></ul>	<b>Ongoing</b> <ul style="list-style-type: none"><li>• New users</li><li>• New products</li><li>• New orgs</li><li>• Product updates</li></ul>



## New users in existing accounts

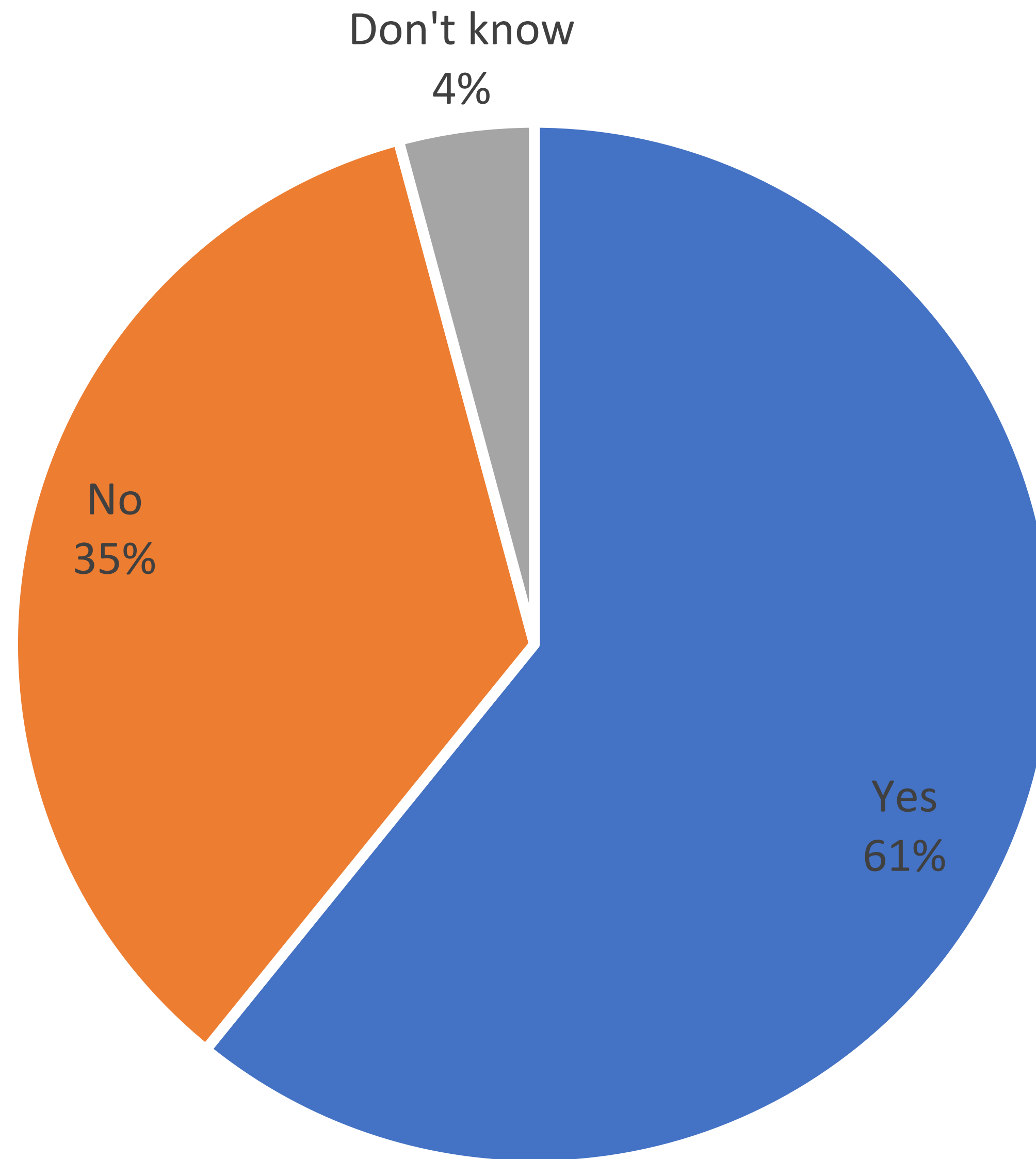
Self-paced

In-App

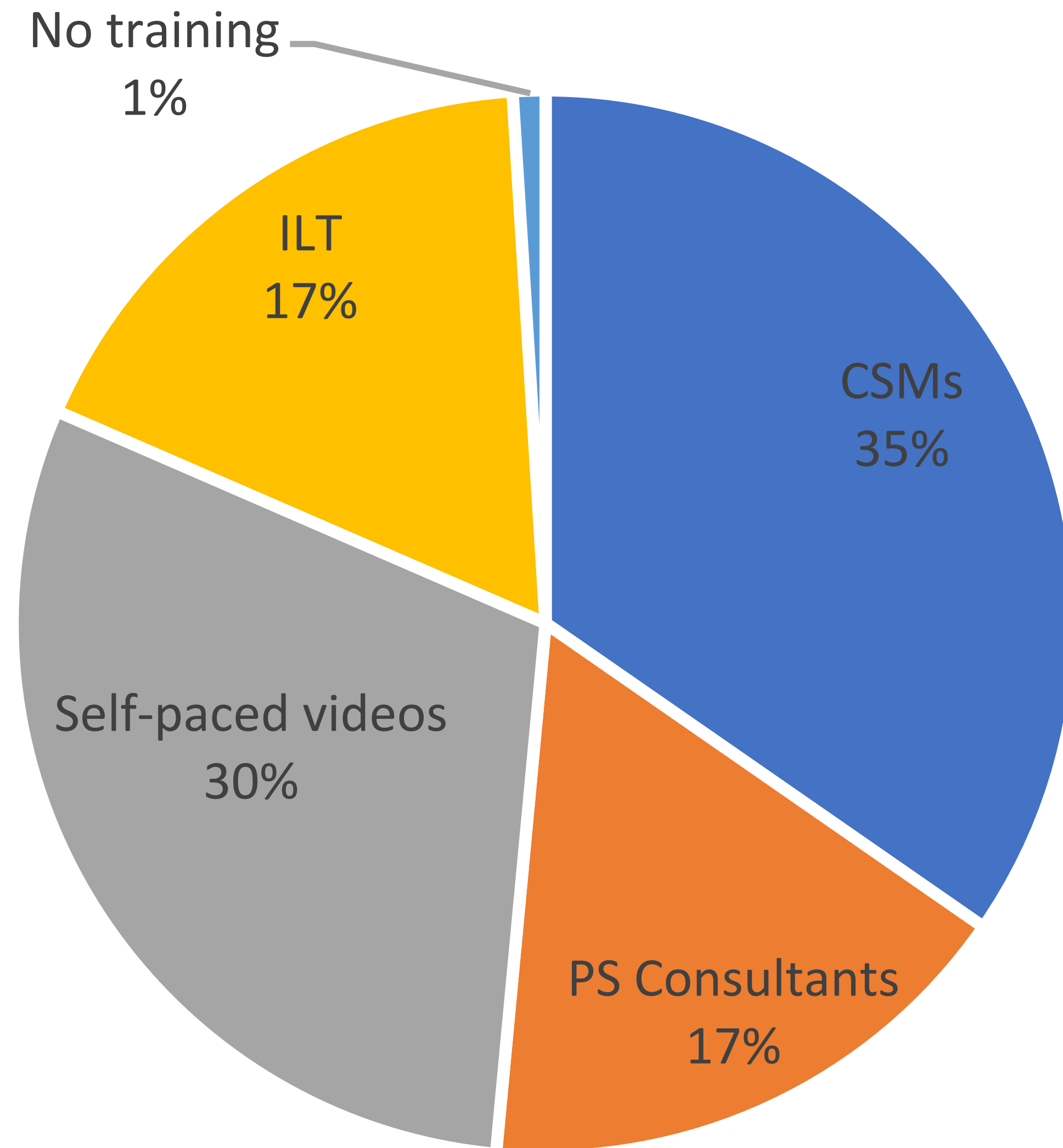
Live Online

Webinars

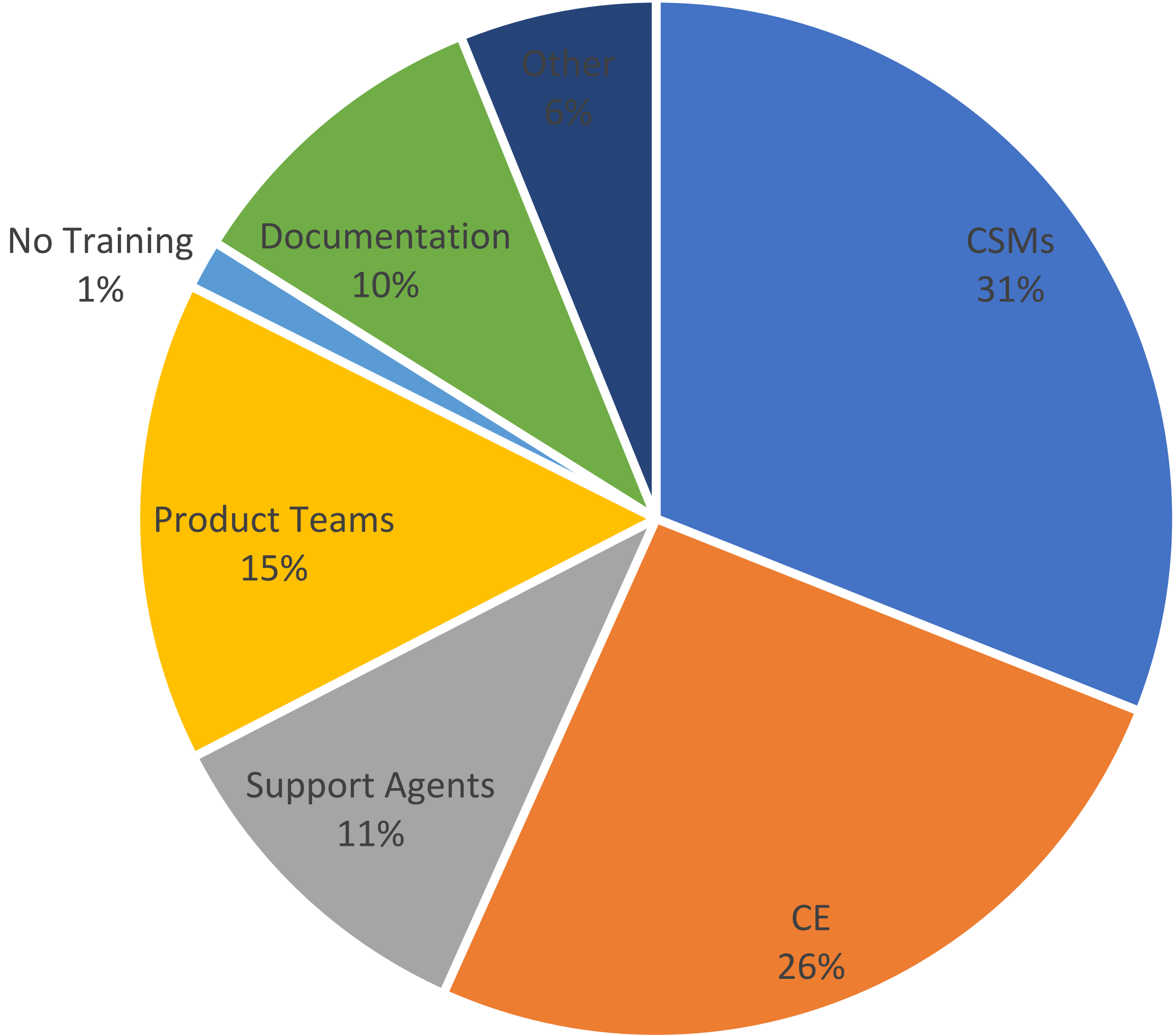
# Do you formally onboard new users in existing accounts?



# How do customers learn how to use your product?



# Who creates customer training or enablement content at your company?





# Existing product updates

- **Webinars: Live & on-demand**
- **Delta courses**
- **Email campaigns**
- **In app**



# New products

- WIIFM
- Courses
- Webinars
- Email campaigns
- In app



# Considerations for new organizations within existing accounts



Separate  
implementation &  
integration?



Onboarding new  
users to existing or  
new  
implementation?

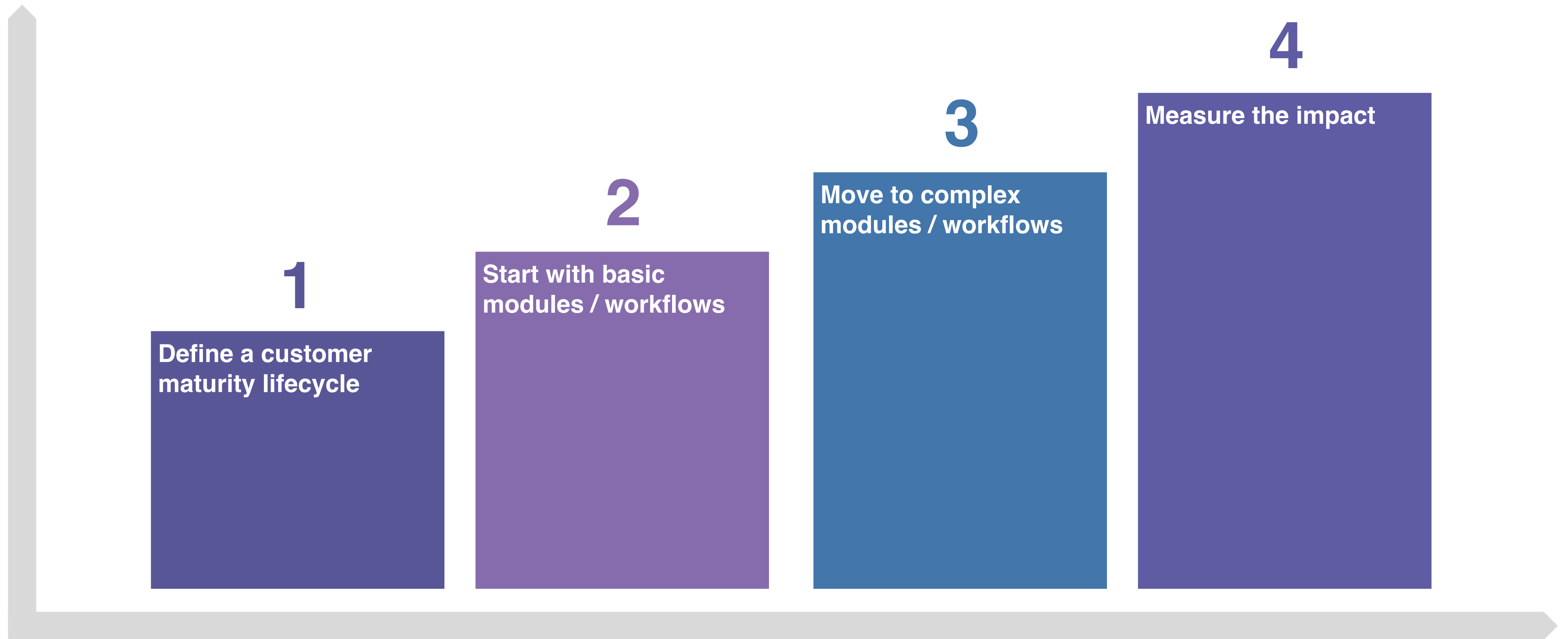


What are the  
requirements of the  
new organization?

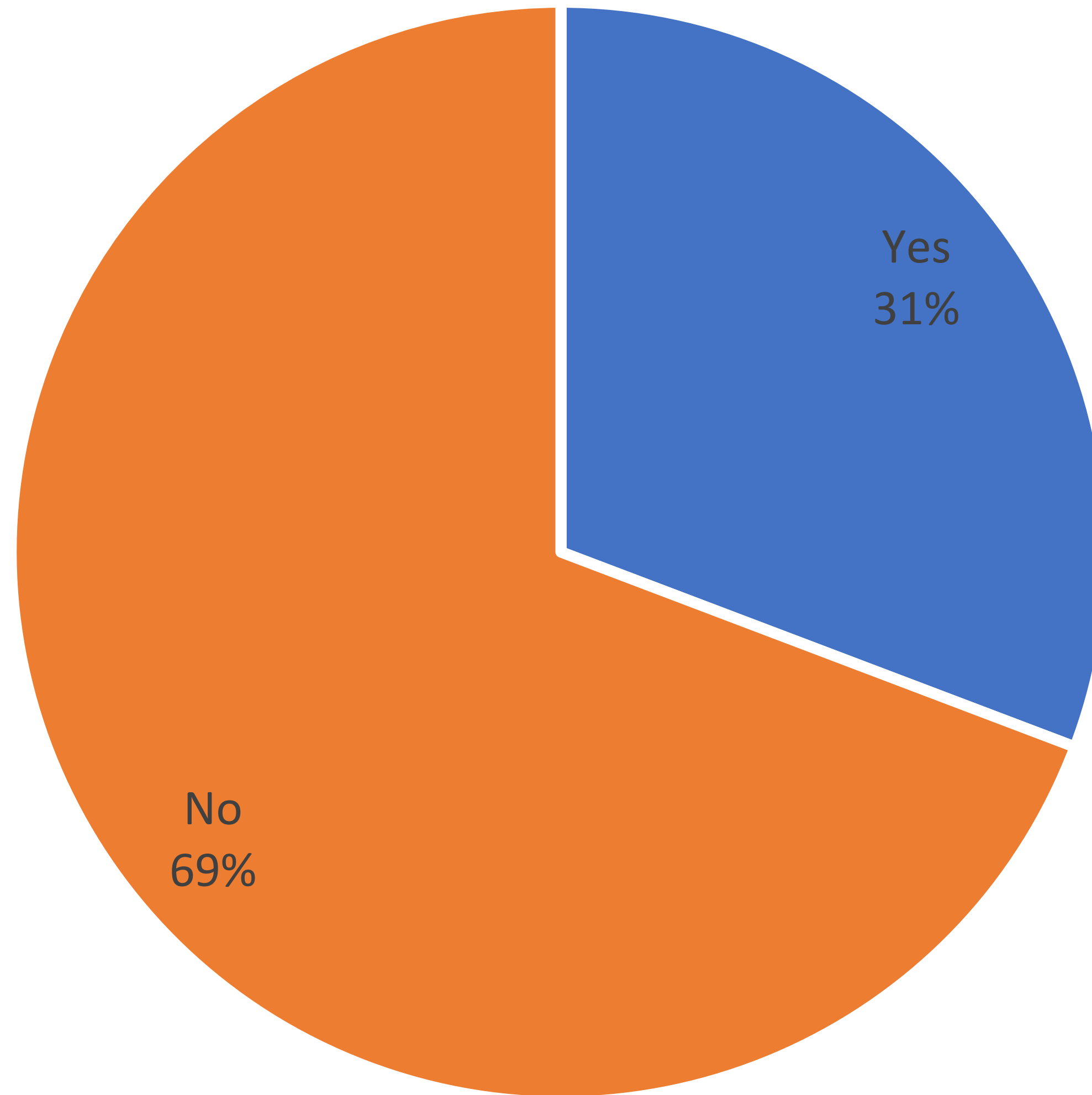


What are their  
desired goals &  
outcomes

# Phases of customer maturity



# Do you charge for customer onboarding?

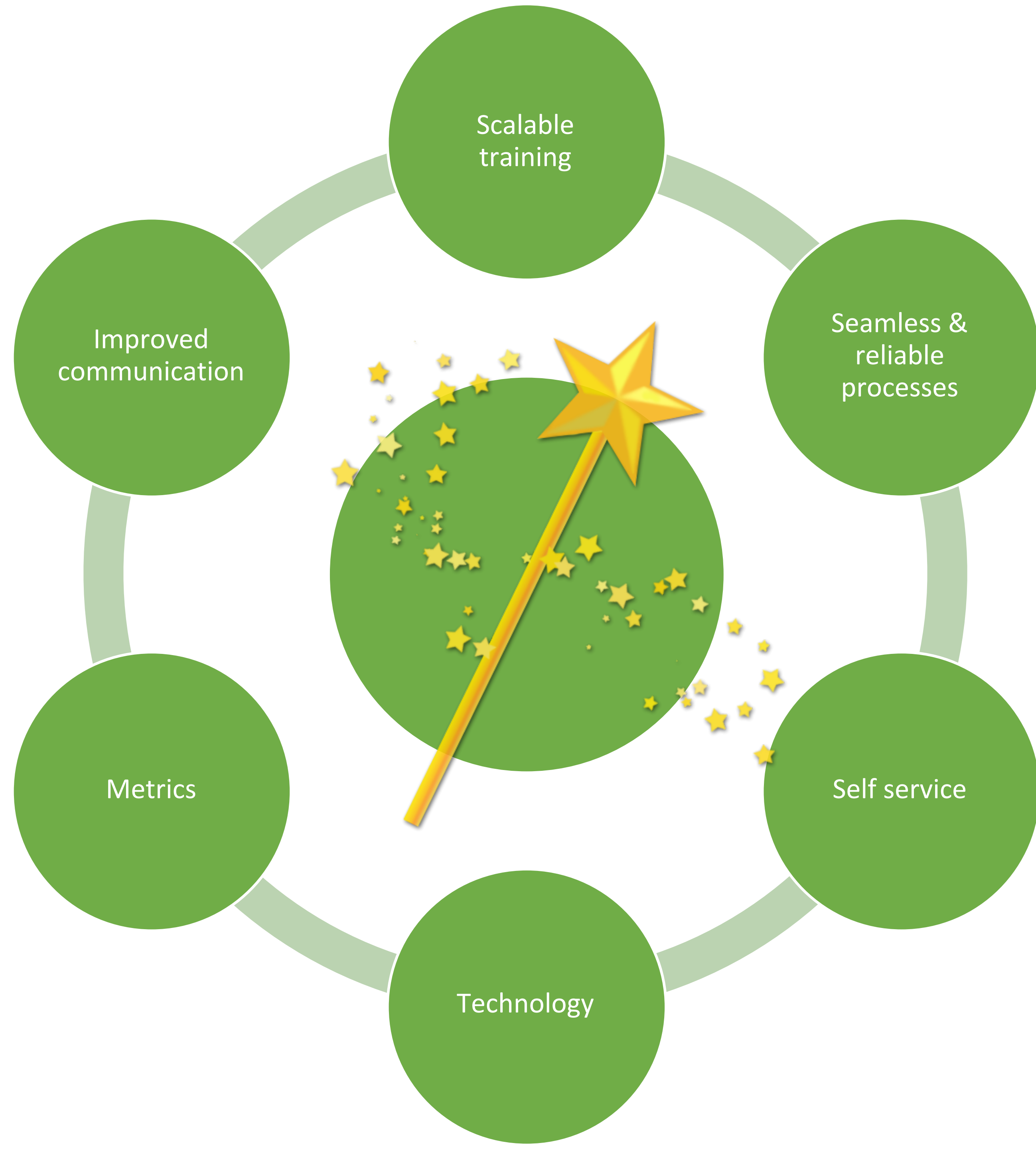


A background network diagram consisting of numerous nodes (circles) of varying sizes and colors (dark blue, grey, white) connected by thin lines. The nodes are arranged in a complex, interconnected pattern, with some nodes having multiple connections, suggesting a hub-and-spoke or mesh network structure. The overall aesthetic is clean and modern, with a light grey background.

# Next steps

**If you had a magic wand what is one thing you would change today?**









**New users in existing accounts**



**Existing product updates**



**New products**



**New organizations within existing accounts**



**Phases of customer maturity**



**Let's  
connect!**

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# CS100SUMMIT

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client**success**