Onboarding as the Foundation for Customer Success

Sandi Lin
CEO
Skilljar

platinum sponsor

Service ROCKET
Fwd: who can I call?

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

thanks. Bill

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

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

Low Touch

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

High Touch
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- Varied use cases
- Some friction in adoption
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High Touch
- New product/behaviors
- Extensive implementation
- Many stakeholders involved
- Enterprise users
# Milestones and measurement

## 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)

- 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

<table>
<thead>
<tr>
<th>Phase</th>
<th>Handoff</th>
<th>Kickoff</th>
</tr>
</thead>
<tbody>
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<tr>
<td>Activities</td>
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<td>Time post CW</td>
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<td>7 days</td>
</tr>
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# Milestones and measurement

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• 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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<td>• User experience works as desired</td>
<td>• Migration complete (optional)</td>
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Effective tactics for success

Self-service
- Product exploration
- Email messaging
- Knowledge bank

Low Touch

High Touch
Effective tactics for success

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Low Touch

High Touch
- On-demand training
- In-app guidance
- Community
- 1-many webinars
Effective tactics for success

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- Product exploration
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- Knowledge bank

Low Touch
- On-demand training
- In-app guidance
- Community
- 1-many webinars

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
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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