



BRITTANY SOINSKI

ONBOARDING LEADER

LOOM

Video-Driven Onboarding:
From Consumer Trends to Enterprise Success



CS100SUMMIT

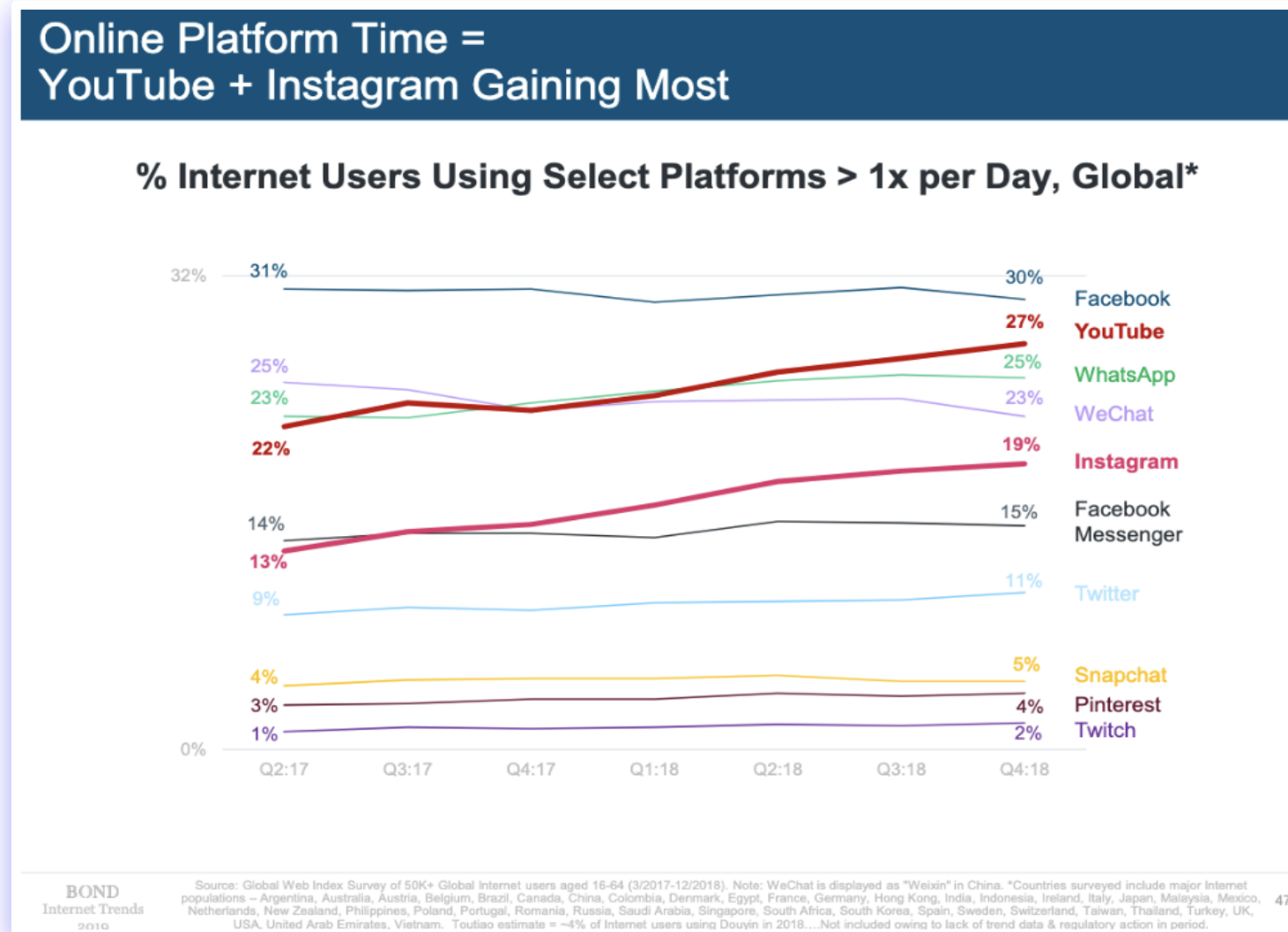
The Days of Long, Boring Guides are Over



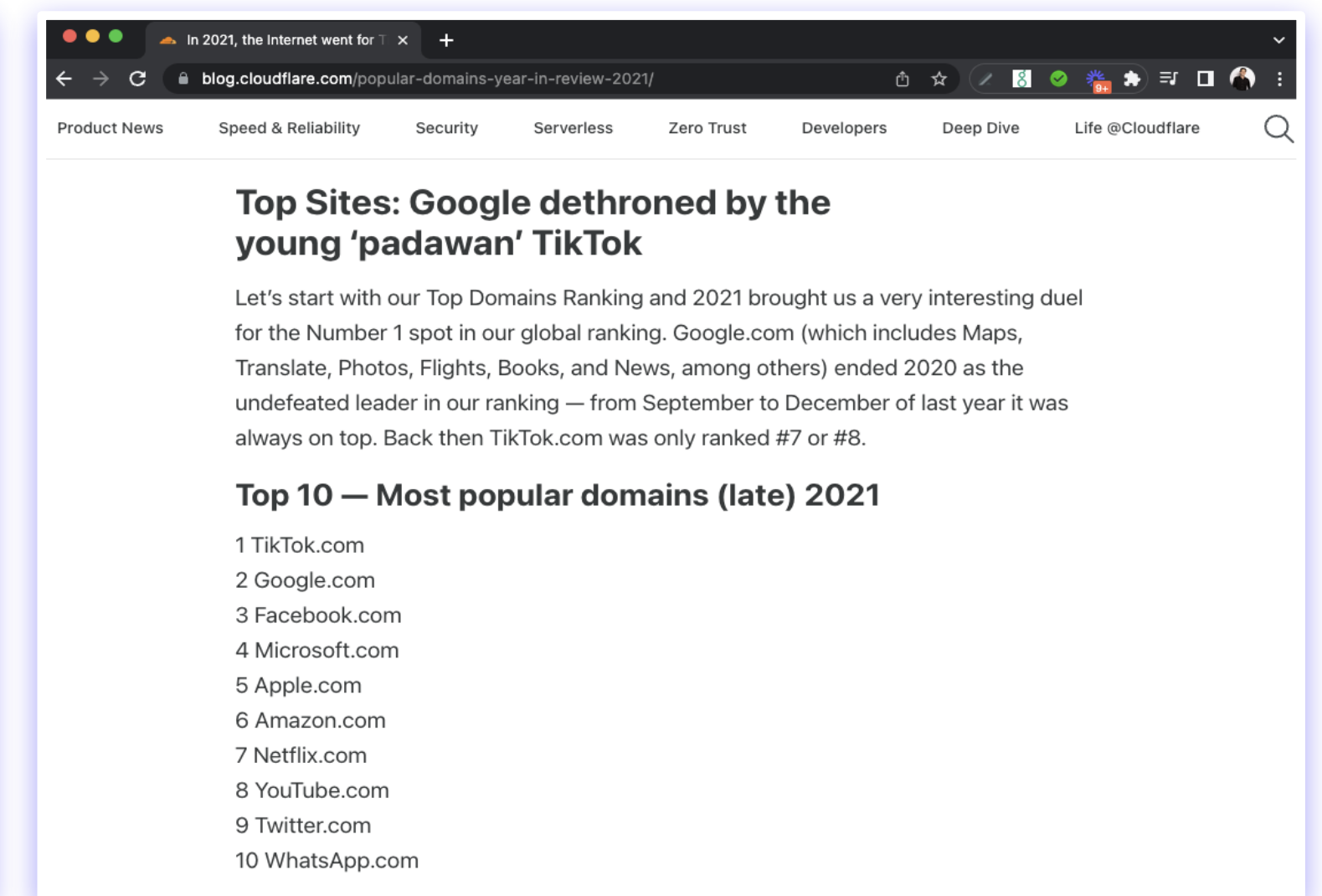
Consumer Behavior → Enterprise Behavior

“Social media has pivoted strongly to video, and communication pros are looking to learn from this trend and adapt it for enterprise use cases.”

[Forrester 2023 Best Practice Report](#)



2019



2022



Video Communication is Effective and on the Rise

32%

of employees

say the majority of work meetings could be replaced by recorded or async video

72%

of customers

would rather learn about a product or service by way of video

32%

of Gen Z

Say it's harder for them to communicate in writing versus verbally

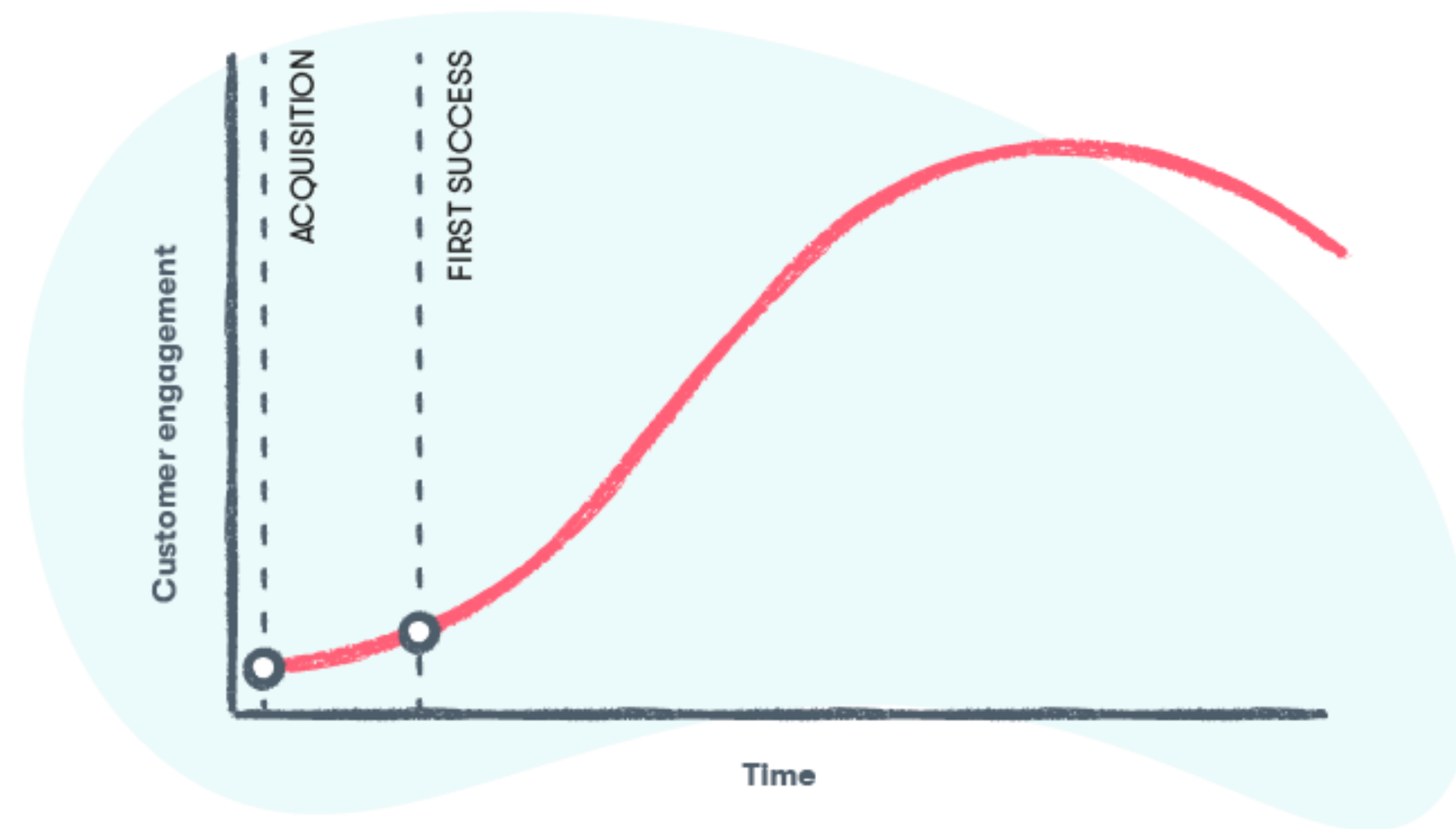


Video Onboarding

From Viewer to Doer: Accelerating Time to Value

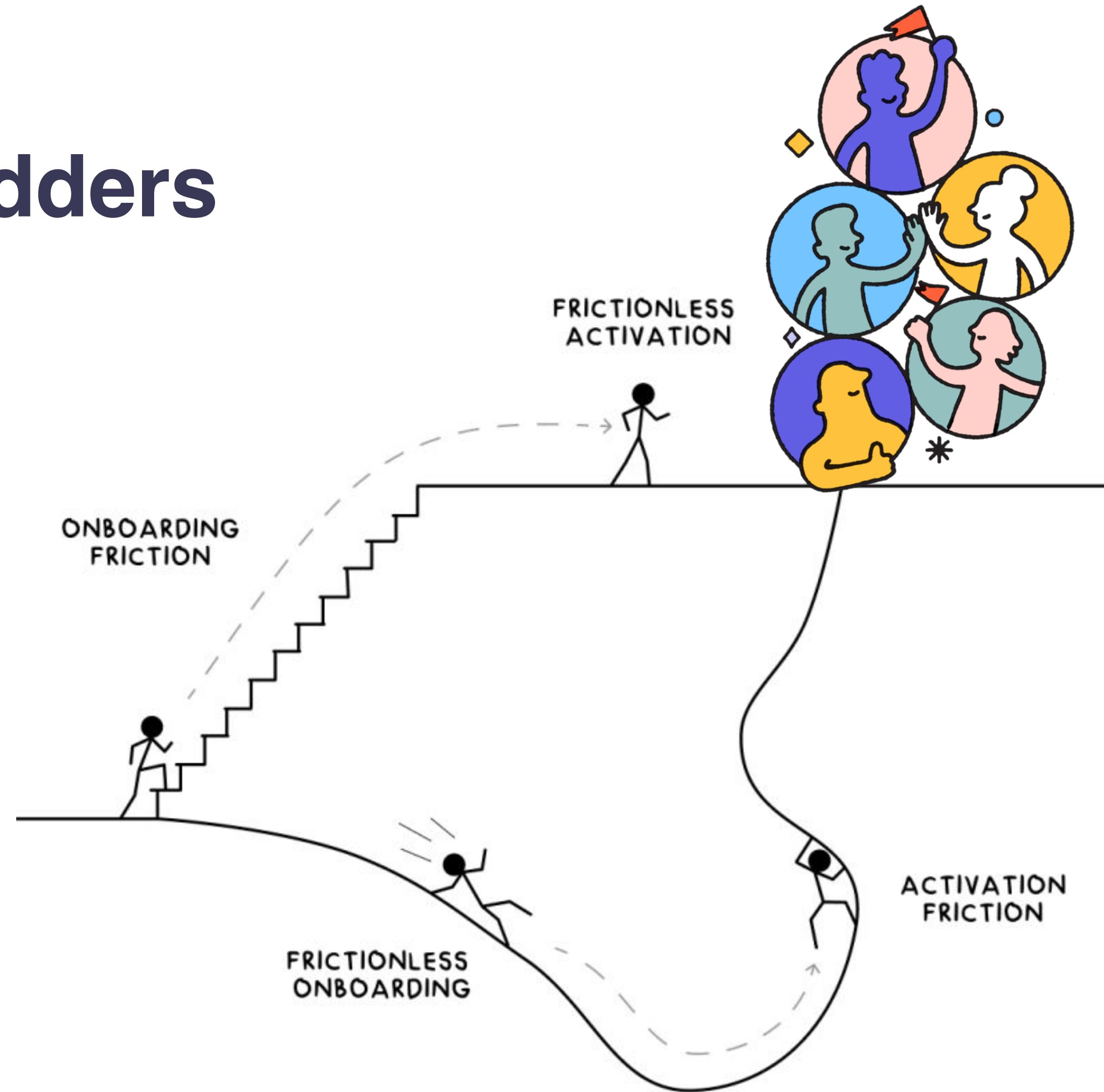
“40-60% of software users will open an app once, and never log-in again”

Grove Content Team



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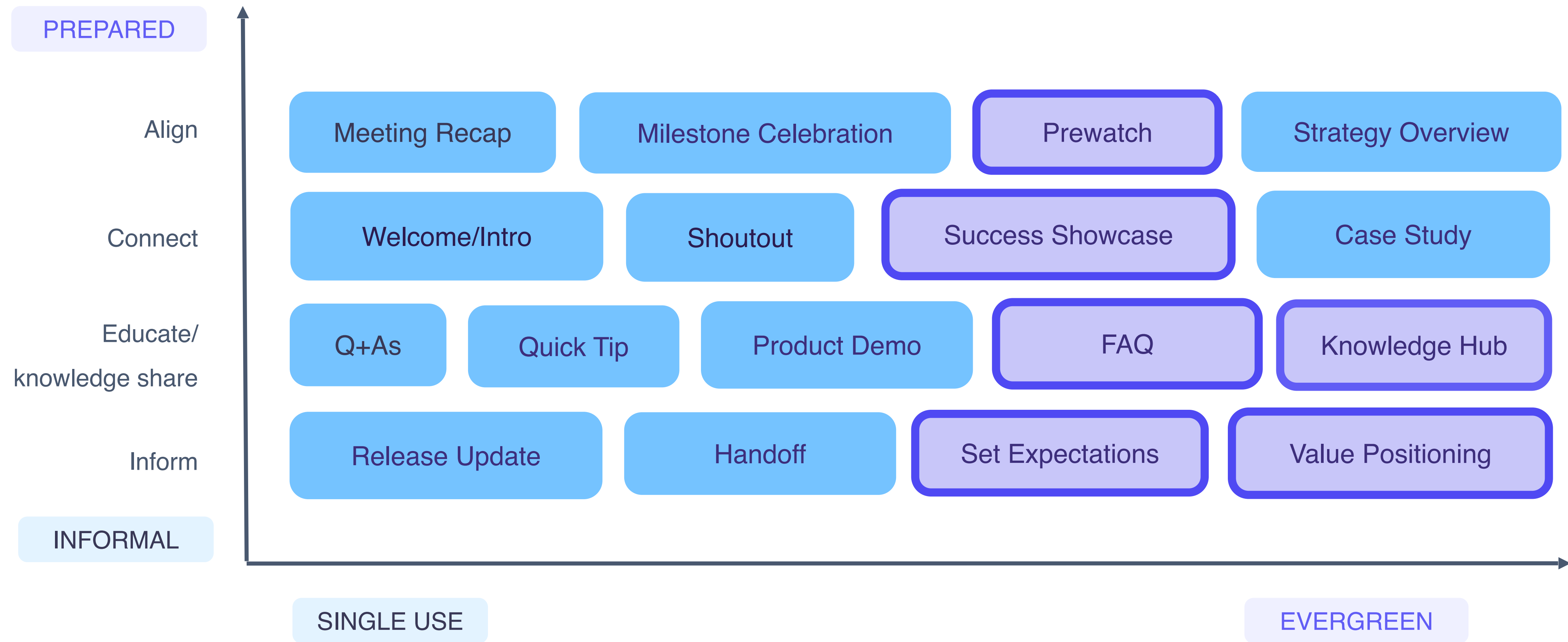
Chutes and Ladders



@YAAKOV CARNO



No Agenda, No Attenda




Use Cases

From Q&A to FAQ: Video Rich Content that Scales

Onboarding Videos (24) ^


 **Tamira Davis**

#team-support

 **Loom**
Product Walkthrough


Paste your link here loom.com/share/3a...

Onboarding for Fatima
January 21 2024

 **Addie Gill**

Client Handoff


Handoff Checklist for Gordon
February 1 2024

 **Tamira Davis**


Onboarding for Sonar
February 10 2024

 **Addie Gill**

Congratulations!

 **Eric Zhou**

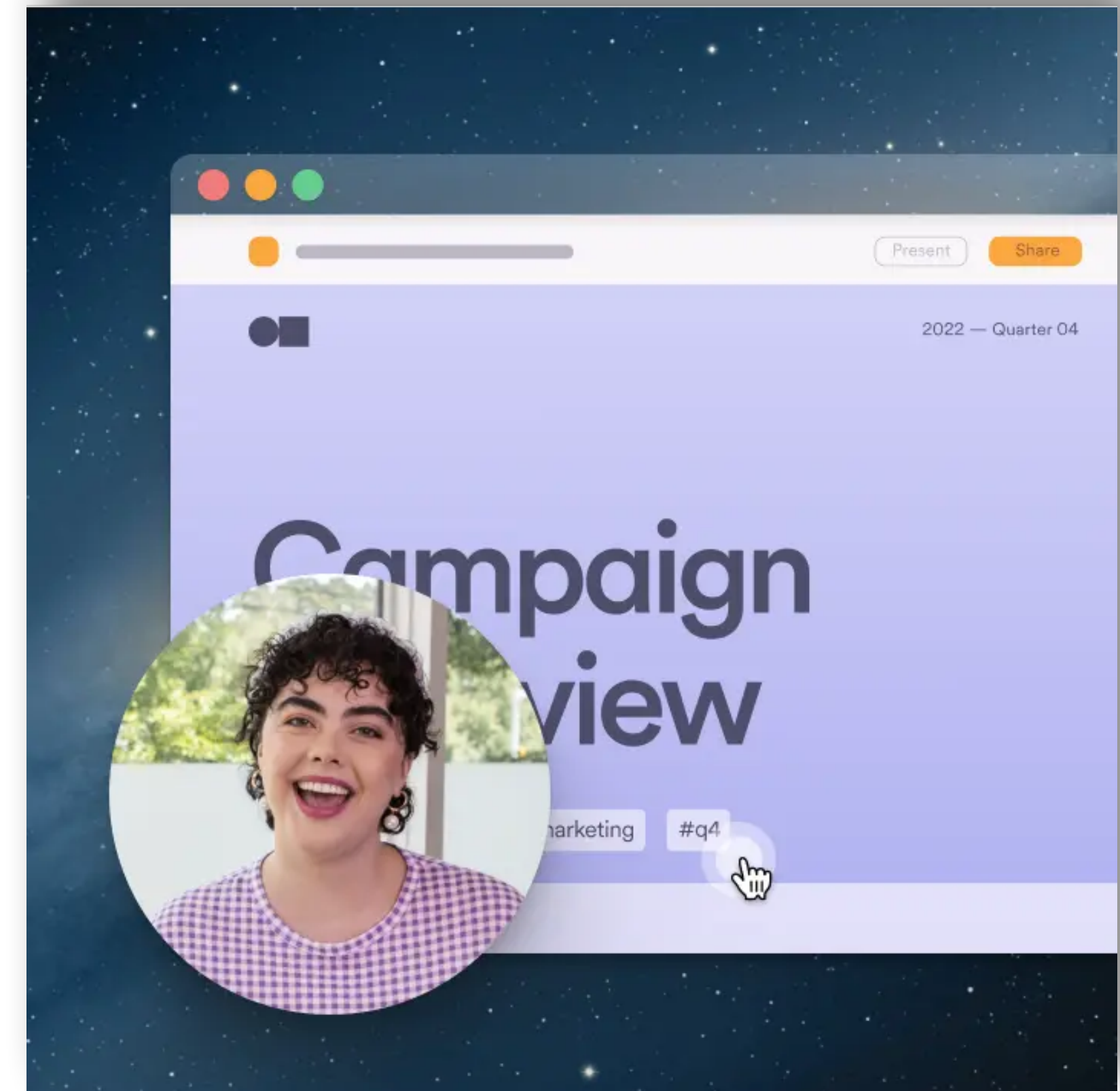
Client Handoff Guide

 **Tamira Davis**

Feature Roadmap



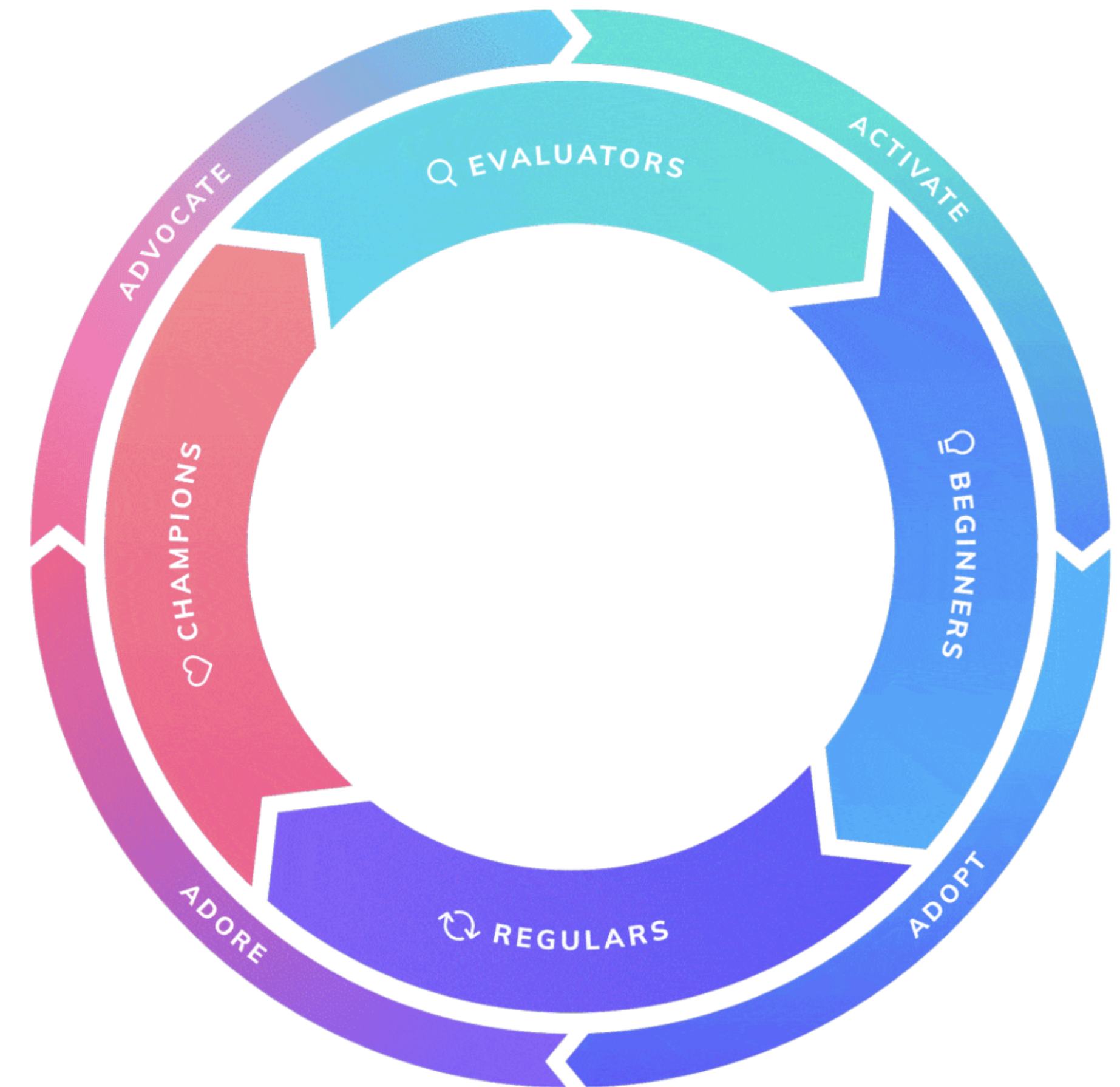
Positioning the Value of Onboarding



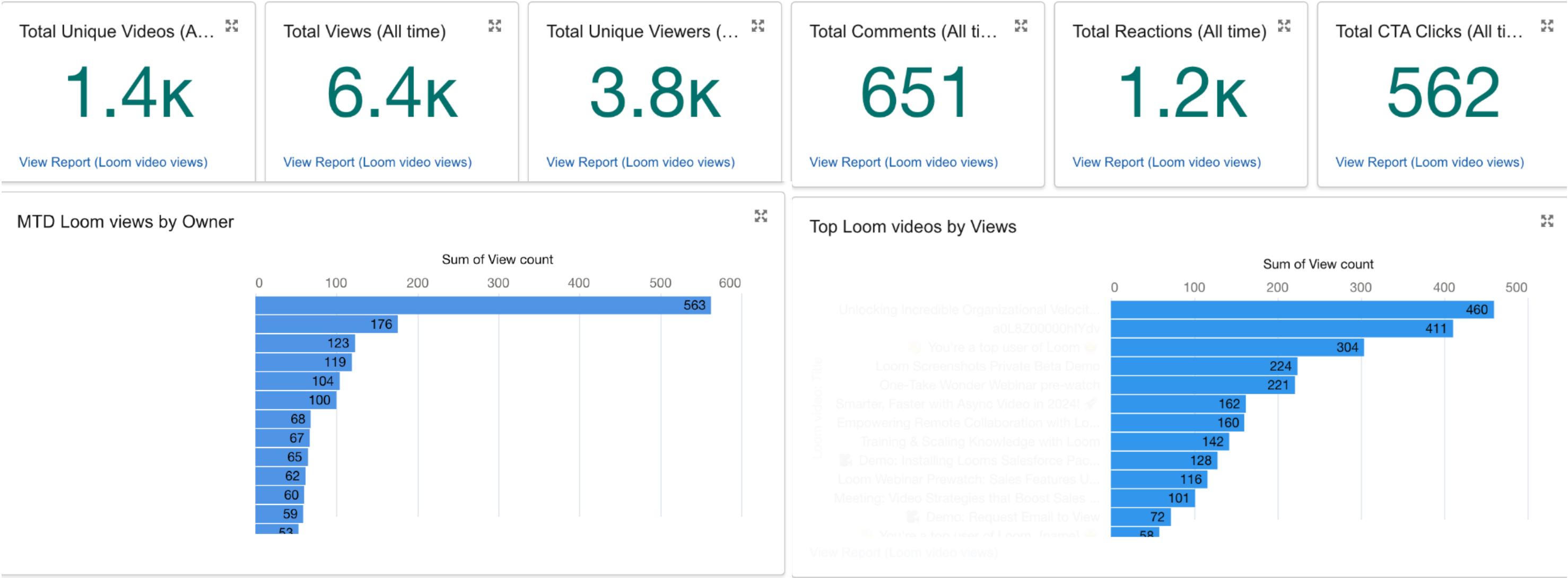
Onboarding Videos Help you Achieve your Ultimate SaaS Goal: **Widespread Adoption.**

“People are 52% more likely to share video content than any other type of content.”

[Hubspot Research Study](#)



Metrics that Matter: Video Led Expansion



56%

Win rate

75%

Win rate with video engagement



Follow-ups Work Best if the Timing is Right



Use **Engagement Insights** to understand WHO is watching your content & WHEN

Get alerted as soon as a customer watches or reacts to your video. Monitor watch time and shares.

Tip 💡 : Set up notifications to be alerted when someone watches your video.



Optimize

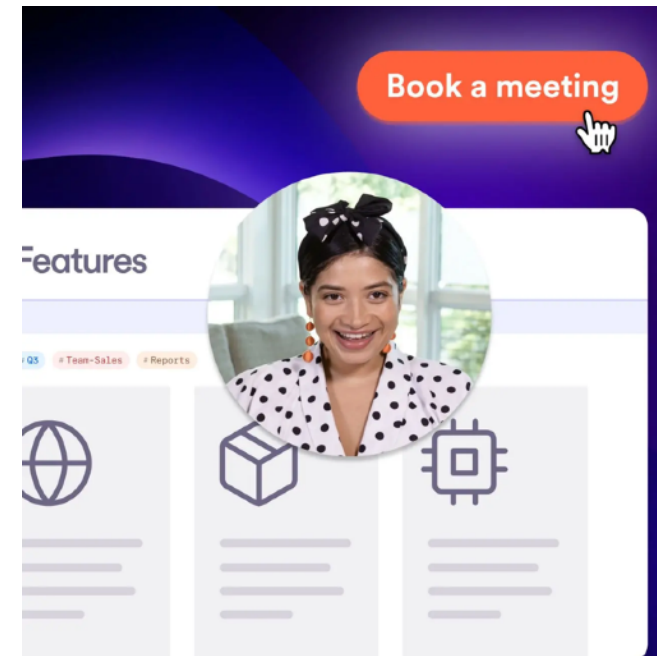
Reflections on Effective Communication

“Welcome emails have 4x the open rate and 10x the click through rate of other kinds of emails”

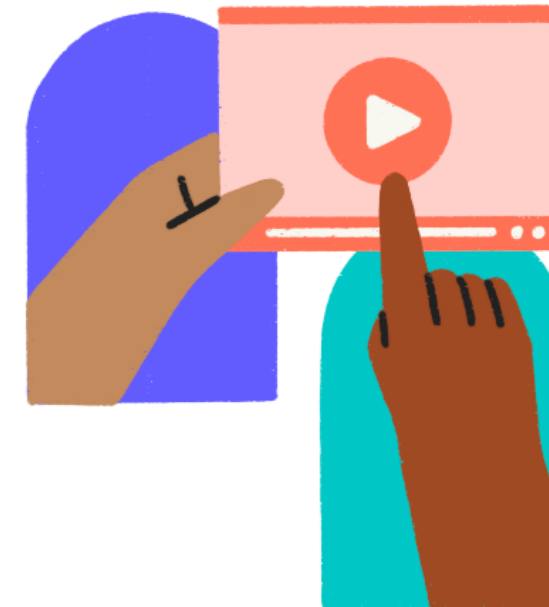
[Customer.io Research Study](#)



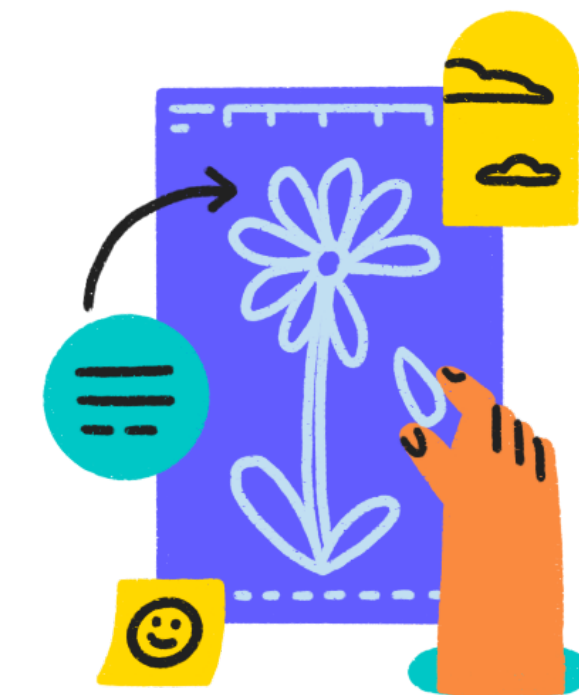
Personalize where possible. Tone matters!



Consider your CTA



Keep it short & make it skippable



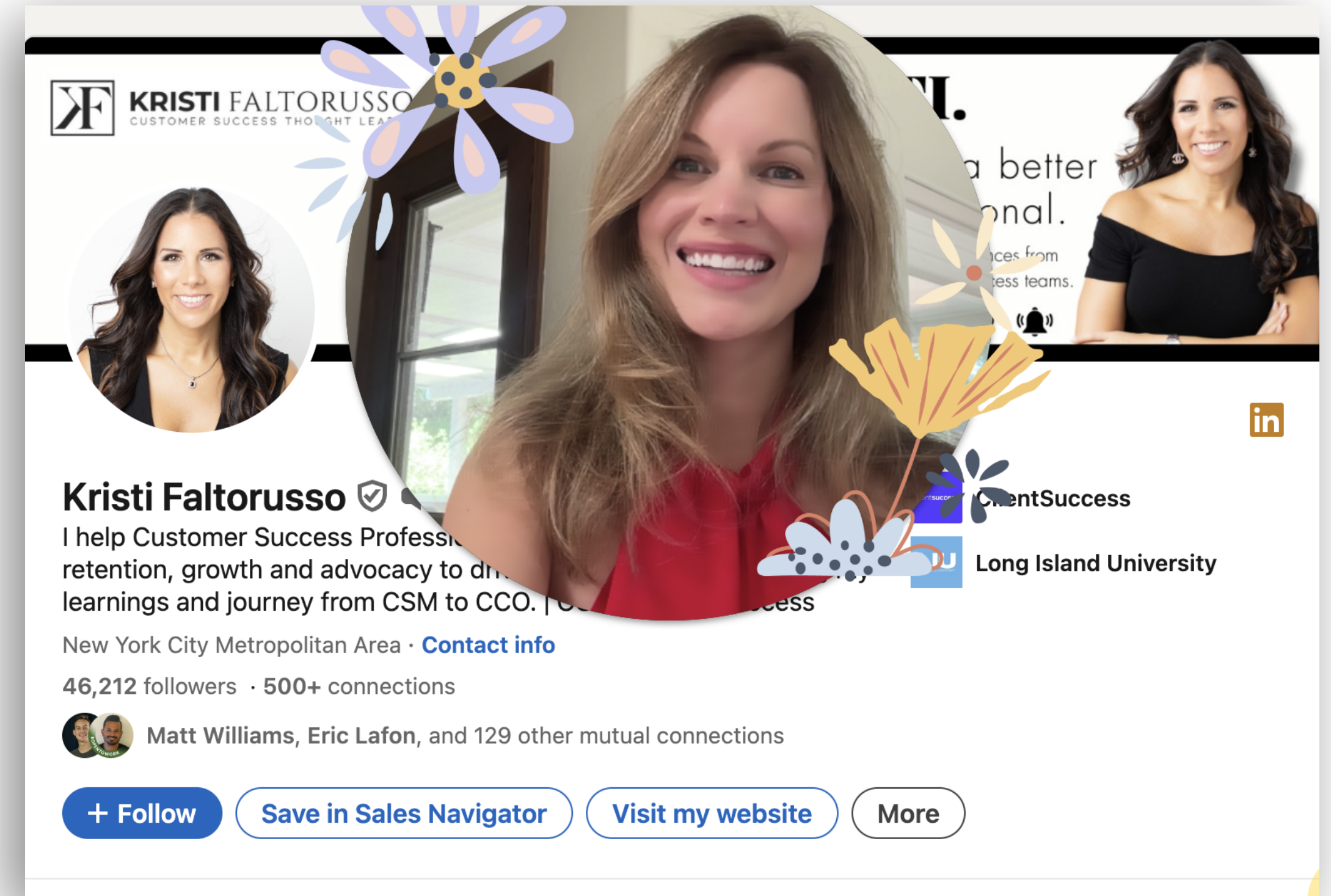
Leave something to discover



Optimize

Increase your Views

- Be **Human**, be yourself
- **Short** and sweet
- Surface the **next step**
- **CRM Integrations** are your friend
- Share an image they recognize
- **Customize by name**



Tip 💡 : *Expectations are everything. Include the the word “video” + someone’s name in the email subject line to increase open rates by 26%.*

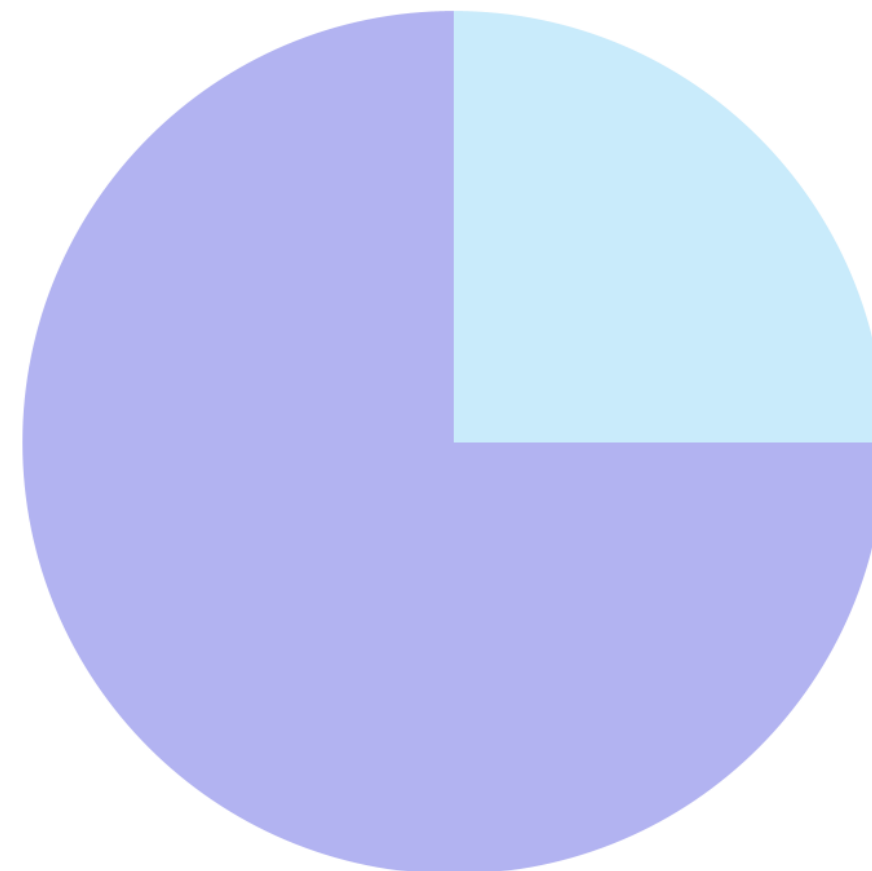
Optimize

Production Values

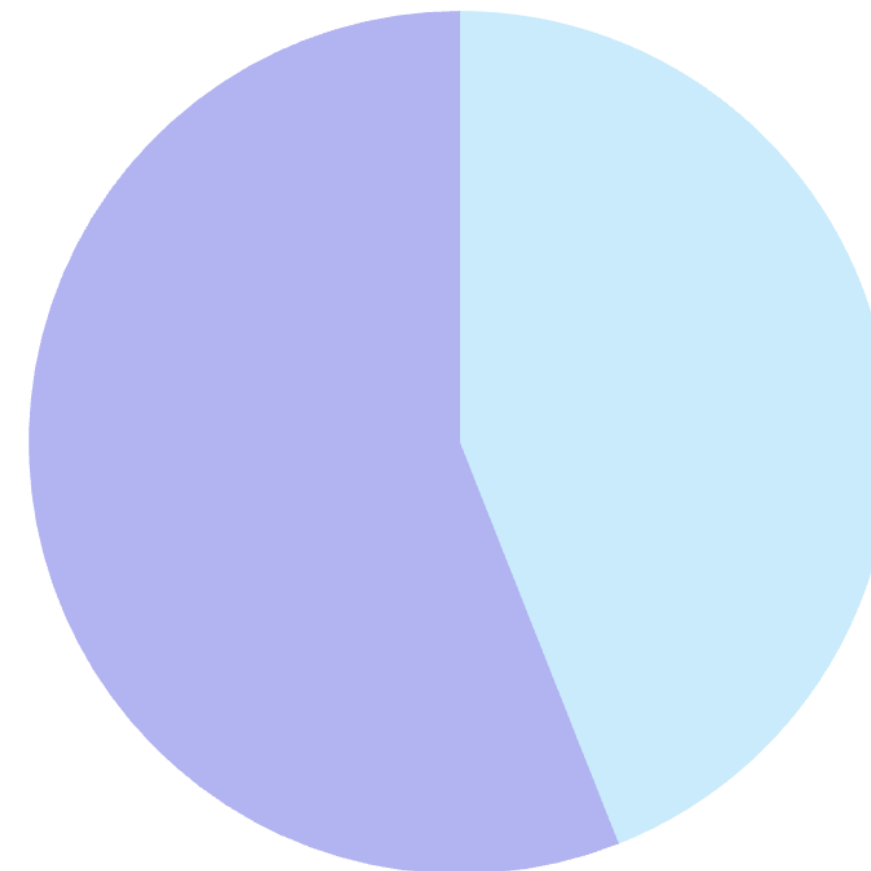
“The Baby Boomer generation significantly values relatability and authenticity (75%) over video production quality (25%)”

[Hubspot Research Report](#)

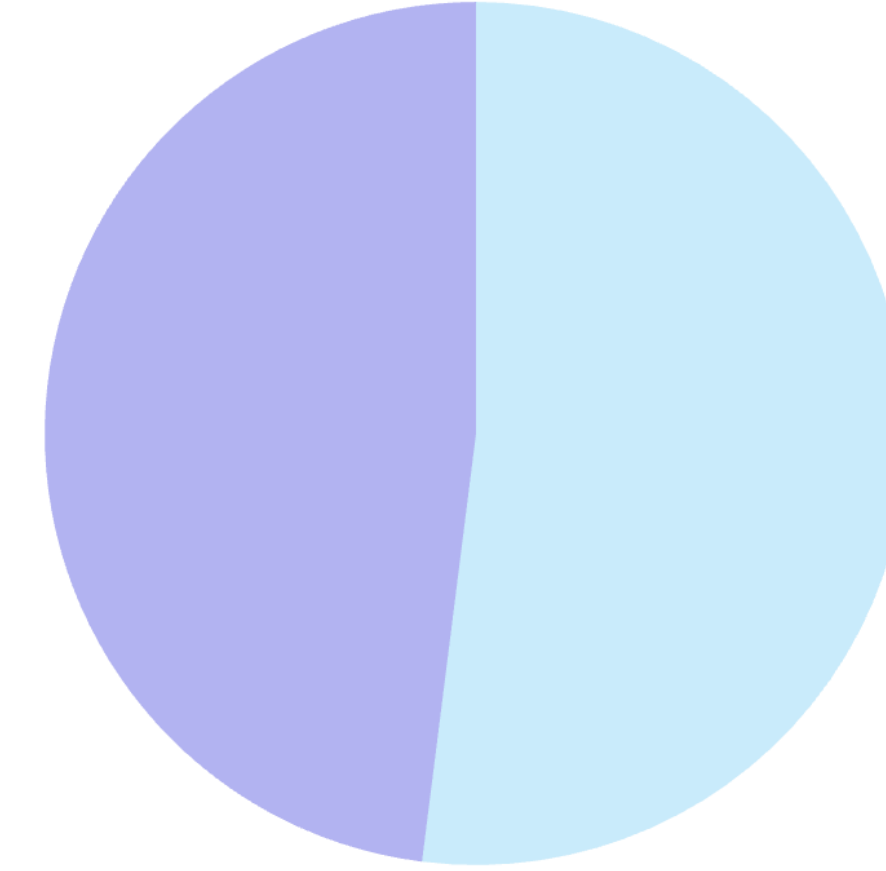
● Production Quality
● Relatability & Authenticity



Baby Boomer



Millennials & Gen X



Gen Z



Conclusion

Your Next Steps: Implementing Video Onboarding Strategies



Thank you!