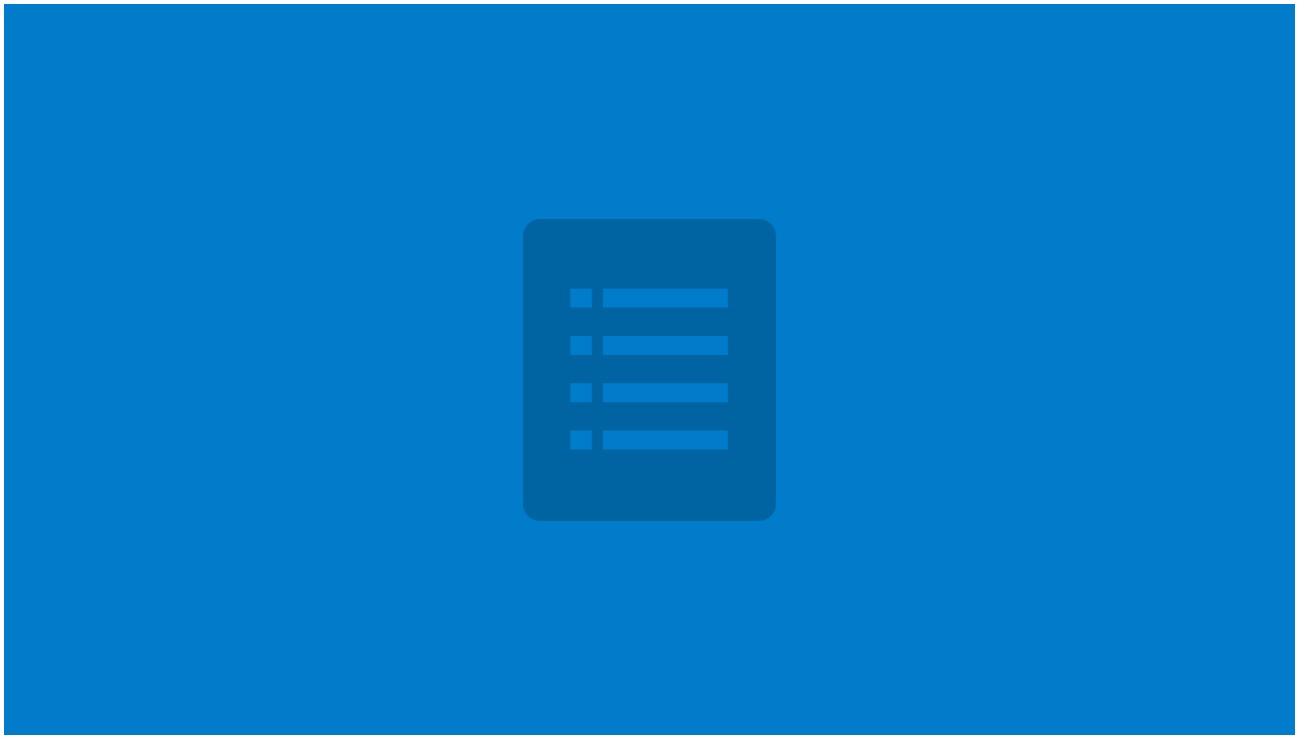
Checklist: SaaS Customer Onboarding

Customer Onboarding Expert Tips and Tools



Start from the customer POV:

- [ ] What is success for your customer? What contributes to your chum rate? These are the fundamental questions to answer for onboarding and to make customers stick. If you're not solving their problem, and making it for them to do so, it's time to rethink _ You Will ascertain this from interviews. questionnaires, or conversations with customers who have exited. Or ask them upfront when potential customers land on your site.

prove your value ASAP:

- [ ] When the Aha moment comes early and the customer reaches value. that's when customers are more likely to stay. You can consider every milestone as a potential Aha moment, which is also how you should design your customer journey.

Provide guidance:

- [ ] Every user is bound to run into some kind of issue. Make tutorials and documentation simple and understandable, but also make it easy for customers to reach out for the next level if they re stuck.

Think Video:

- [ ] They’re engaging, Can be replayed, and Simply make Sense in the customer-centric universe.

Don't overwhelm:

- [ ] It depends on what you're selling, but a stepped approach to information is easier to take in than all-at-once. Consider a

mixture Of methods to bring Customers along.

Check your data:

- [ ] The best method to employ is to carefully focus your onboarding efforts on the key metric that's most relevant or important to your particular SaaS. while tracking and monitoring the other ones. Depending on your service. your metric may be network density. visit frequency. recurring revenue, churn, or lifetime value.

Provide the right support:

- [ ] Ideally, you have conversations through instant messaging/phone or some other means. but that isn't necessarily practical at scale. The best Way to approach that is with a mixture Of various Customer support methods. based on Customer profiles and where they are in their customer journey.

Stay in touch:

- [ ] Brief, useful notifications based on where the customer is in their journey can be a nice reminder of your value, and keep them on the and to buying. or buying more.

Pick up the phone:

- [ ] There is nothing like human contact to create loyalty and a sense of caring. Sometimes, only a call will do.

Keep refining:

- [ ] Onboarding doesn't end; you should at ways keep looking for ways to make your customers more successful, Customer Success is the alpha and the omega that keeps you successful. too.

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