

THE SIX DO'S & DON'TS OF SUCCESSFUL CUSTOMER ONBOARDING



DON'T

Don't keep onboarding as your best kept secret.

The earlier you show new customers you know what you're doing & that you've done this before, the faster you foster trust, & the easier it is to engage them quickly.

Don't focus solely on your product.

You won't create customers for life if all you focus on is going live with your product. Instead build trusting & enduring relationships.

Don't wait until customers have problems.

Customers don't want problems. Instead of waiting until new customers get lost & need help, give them the guidance & the right path to follow.

DO

Do start onboarding before the deal closes.

Establish continuity from the buyer journey to the customer journey by setting expectations & holding handoffs.

Do onboard the people who use your product.

While you celebrate when an account is officially launched, this is just the beginning of user adoption. Users are the actual people who employ your product to do their jobs.

Do quickly guide customers to value.

The quicker you drive customers to wins by using your product the more customer loyalty, retention, and revenue will grow.

THE BOTTOM LINE

You make your company successful by engaging your customers & the people using the products without hesitation.

Your new customers realize the real value of the solutions you sell.

Your business gains more loyal, long-standing customers & the revenues they contribute.

And, you become a proactive partner in everyone's success, rather than a heroic problem-solver always under stress.