

Playbook: Onboarding

FOR YOUR
High-Touch Customer

This is an example of an onboarding play for a High-Touch Customer. It provides many personal touch-points with a bit of Automation to help.

1



Preliminary Research

Step: Task

Do preliminary research before reaching to the customer. Connect with your Sales Executive, follow the company on Owler, and connect with the Company on social.

2



Engage the Account

Step: Email

Focus on the initial wins throughout the customer's sales process. Identify and reiterate why the Account purchased. Immediately lay out expectations for their first few days with your organization and lay out, step-by-step, where they can find the resources to execute on those goals.

3



Set the Welcome Call

Step: Task

Call the customer within one day and focus again on reiterating that they've made a good decision and you're excited to set the meeting. Recommendation to set the meeting for your initial discussion during this call.

4



Conduct the Welcome Call

Step: Task

The customer is now feeling confident in their decision. Make sure to reiterate that they've made a good choice and take this opportunity to set clear, realistic expectations with the customer. Restate their goals, confirm they are correct, and commit to mutual timelines and goals for the relationship. Set the next meeting now vs. via email.

5



Welcome Meeting Follow Up

Step: Email

Reiterate your initial points from the Welcome Call and lay out in clear and concise steps what you need from the customer next to help them reach their goals. Ensure you restate their goals as they described them as you'll need to point back to this during further calls and quarterly business reviews.

6



Friendly Reminder In-App

Step: In-App

Ping the customer inside the application for another touch point while they're active in your solution. Reiterate the resources available to them from the previous email and take this opportunity to lightly remind them that you have expectations before your next interaction.

7



Reiterate Goals and Expectations

Step: Task

For a High-Touch customer this is a critical piece to understand as you get started. We don't want to get two or three months into the project and become misaligned with what their initial expectations or goals were. It's OK to have regular meetings - even if for 10 minutes to make sure your customer's expectations are indeed being met.

Final Thoughts

- Don't hesitate to pick up the phone - they want to hear from you.
- Provide them with a checklist or timeline to help set expectations.
- Restate goals and expectations for each interaction and give clear next steps.
- It's OK to use in-app communication to provide additional resources.
- Ask yourself if you're truly headed down the right path to meet the stated goals.