CHURNZERO

Playbook: Onboarding

FOR YOUR

Low-Touch Customers

This is an example of an onboarding play for Low-Touch Customers. It provides a mostly automated interaction with a manual touch point.

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 you organization and lay out, step-by-step, where they can find the resources to execute on those goals.

3 Reiterate Resources

Step: In-App

Immediately deliver to the customer a step-by-step plan inside the app to reiterate what you've sent them in your email. Ideally, this also includes a clear video that explains what they should be doing next and where to find the resources they'll need to be successful.

4 Reiterate Best Practices

Step: Email

After a day or two, deliver another note to the customer focusing on what your most successful customers do and what what folks have typically done by this point. Offer up the best practices portion of your knowledge base for them to access.

5 Deliver a Video

Step: In-App

Deliver a video inside of the application that helps break down some of the more advanced features they can be using. Thank them for using your solution and make it clear that you want to hear from them if they have any feedback as to where they need help.

6 Call the Customer

Step: Task

Even though the majority of your interaction with the customer is low-touch it doesn't mean they don't want some sort of human element or interaction. Call the customer and offer some assistance if you know they aren't set up properly. It will go a long way with how the company perceives your organization and services.

7 Offer Guidance

Step: Task

Deliver an email detailing out what recommendations you may have for their Account. Simply make a few bullet points of common items that need to be addressed and add/remove as appropriate for each Account.

Final Thoughts

- Be sure to point them to specific resources they have available
- Provide them with a checklist or timeline to help set expectations
- It's OK to add some human element to a low-touch campaign
- Use bulleted points in your emails and add/remove to make it feel one-to-one
- Make small changes and iterations for customers with different feature sets
- Use data + automation to make it personal

Click here for more information and help setting up Plays.