

Playbook: Onboarding

FOR YOUR
Mid-Touch Customers

This is an example of an onboarding play for Mid-Touch Customers. It provides a healthy mix of automated communication and assigned tasks.



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, enforce their decision to purchase, and identify quickly that you'll need to connect to maximize their investment and get to their goals.



3

Set the Welcome Call

Step: Task

Call the customer within the first day or two and focus again on reiterating that they've made a good decision and you're excited to set the meeting. Recommend setting the meeting vs. having it on-demand so that you can better prepare.



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 here 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.



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

Offer Guidance

Step: Task

Call customer and offer assistance on the materials you've asked them to deliver with the only intention being to deliver help to them (no expansion efforts here). Do this at a time where you have 15-20 minutes in your schedule in the event that you need to jump in and work on something in the moment to expedite their progress.

Final Thoughts

- Be sure to point them to specific resources they have available
- Provide them with a checklist or timeline to help set expectations
- Summarize their goals to point back to during and beyond your onboarding
- You can set a message for review so don't hesitate to lean into automation
- Ensure you have a few human touch points in the process

[Click here for more information and help setting up Plays.](#)