



Managing Onboarding for Low Touch Customers

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Account Executive



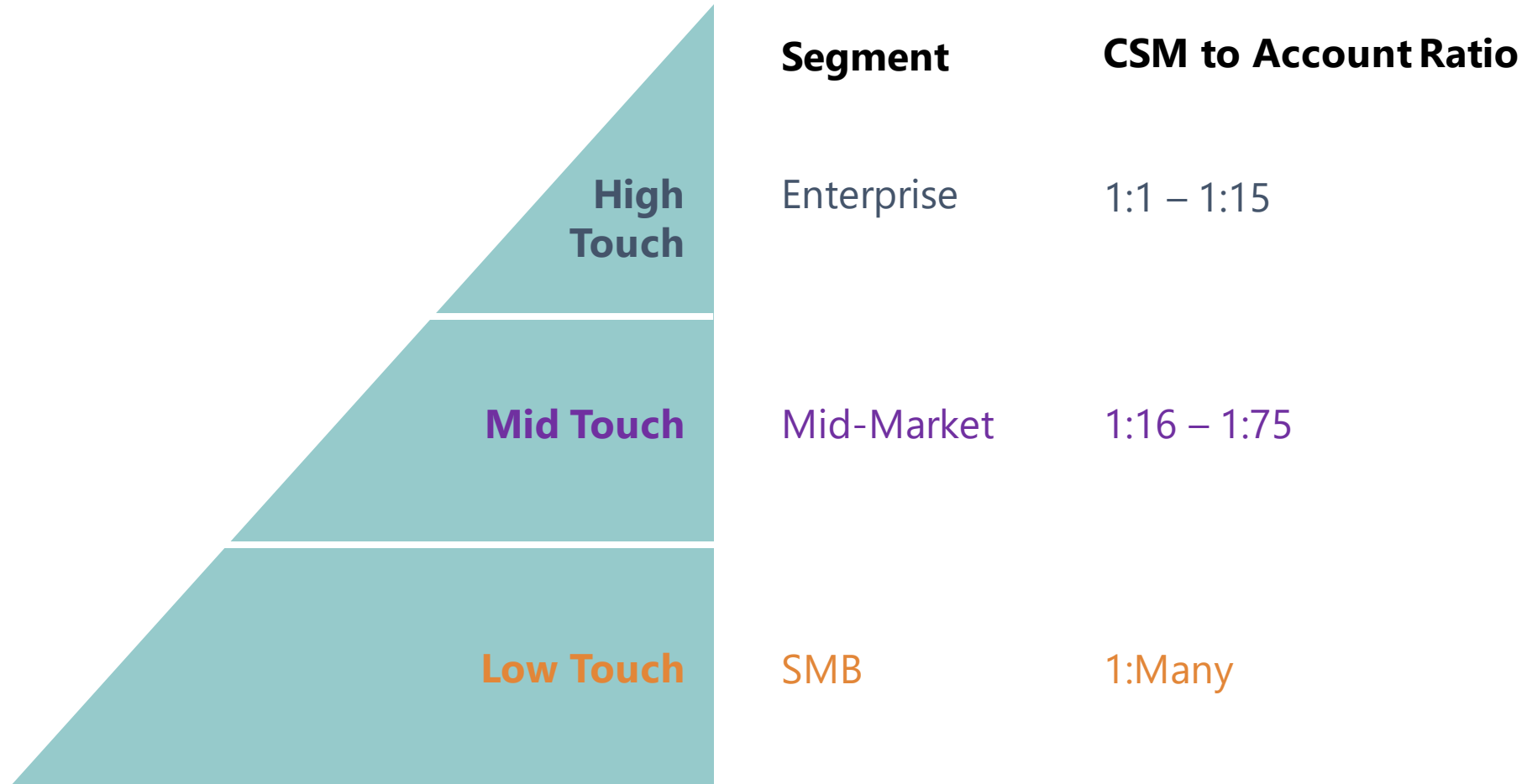
Agenda

Using data to empower customers to be self-sufficient

“Activation” vs “Ah-Ha” moment

Keeping the excitement high for low touch customers

Coverage Models



POLL

Percentage of Customers you deem “low touch”

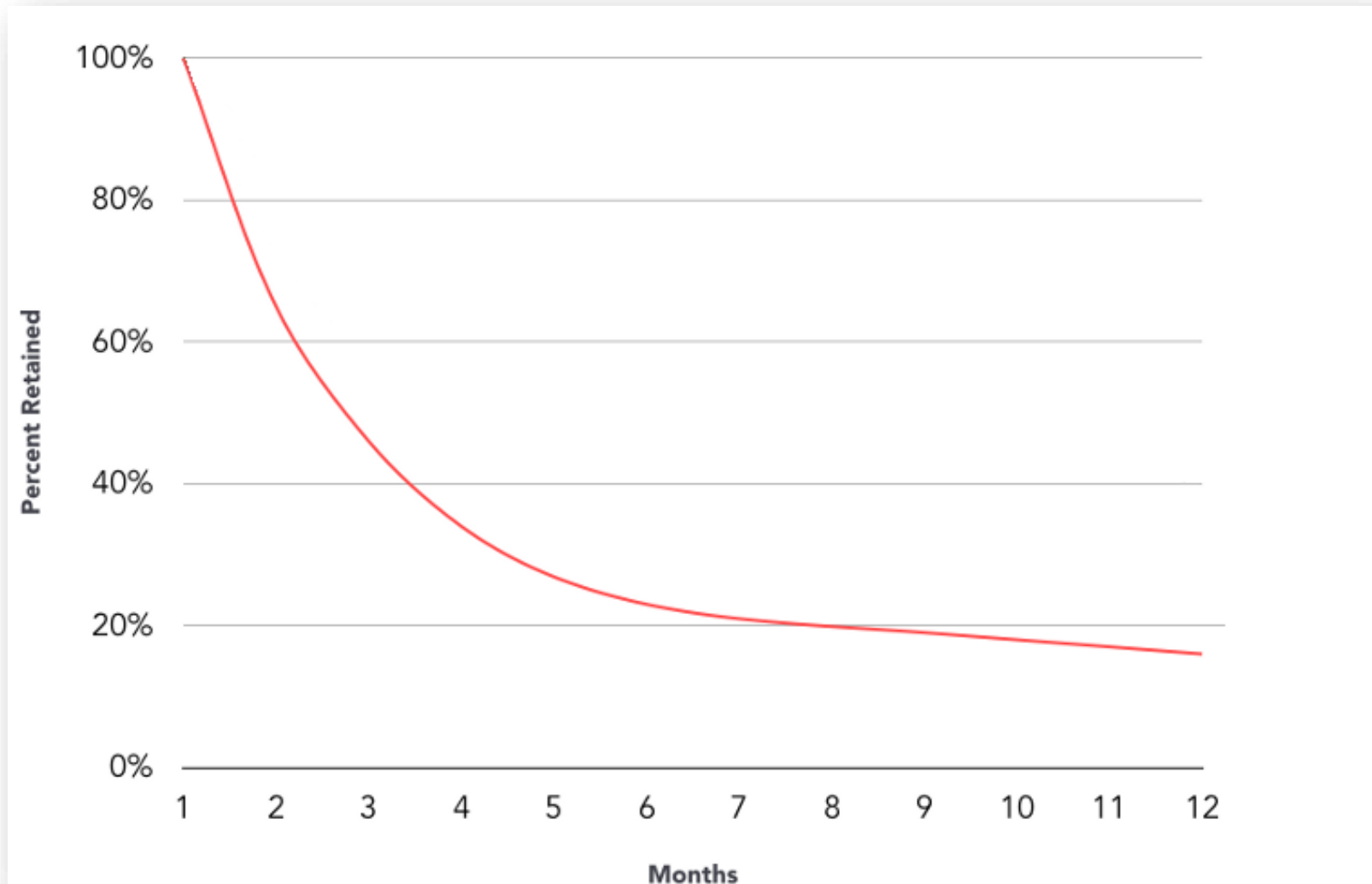
0 – 25%

26 – 50%

51 – 75%

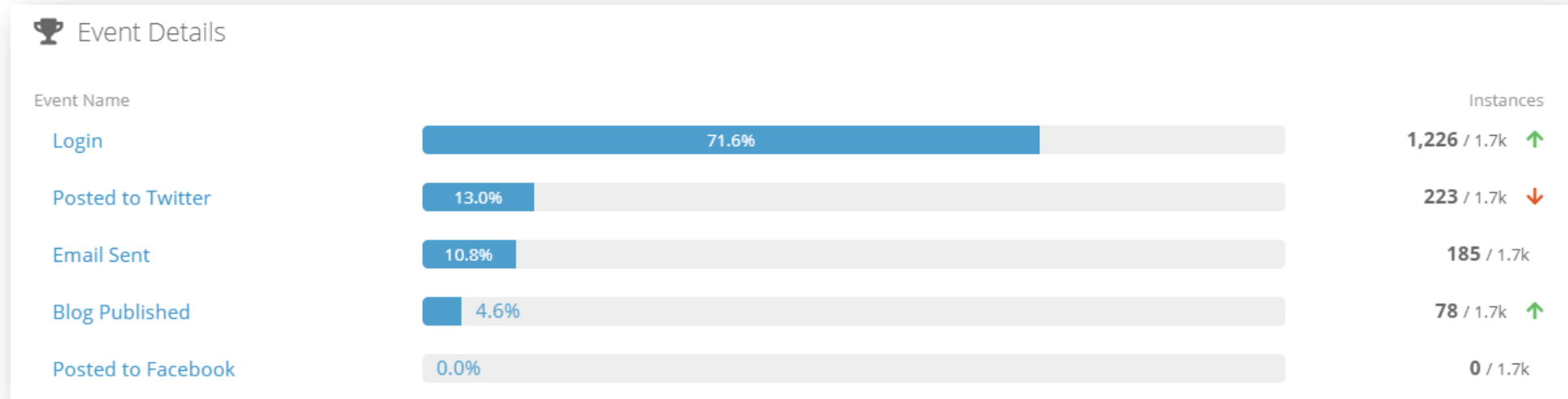
76% +

Retention Curve



Low Touch MUST be Data Driven

Digital Engagement MUST Be Data Driven



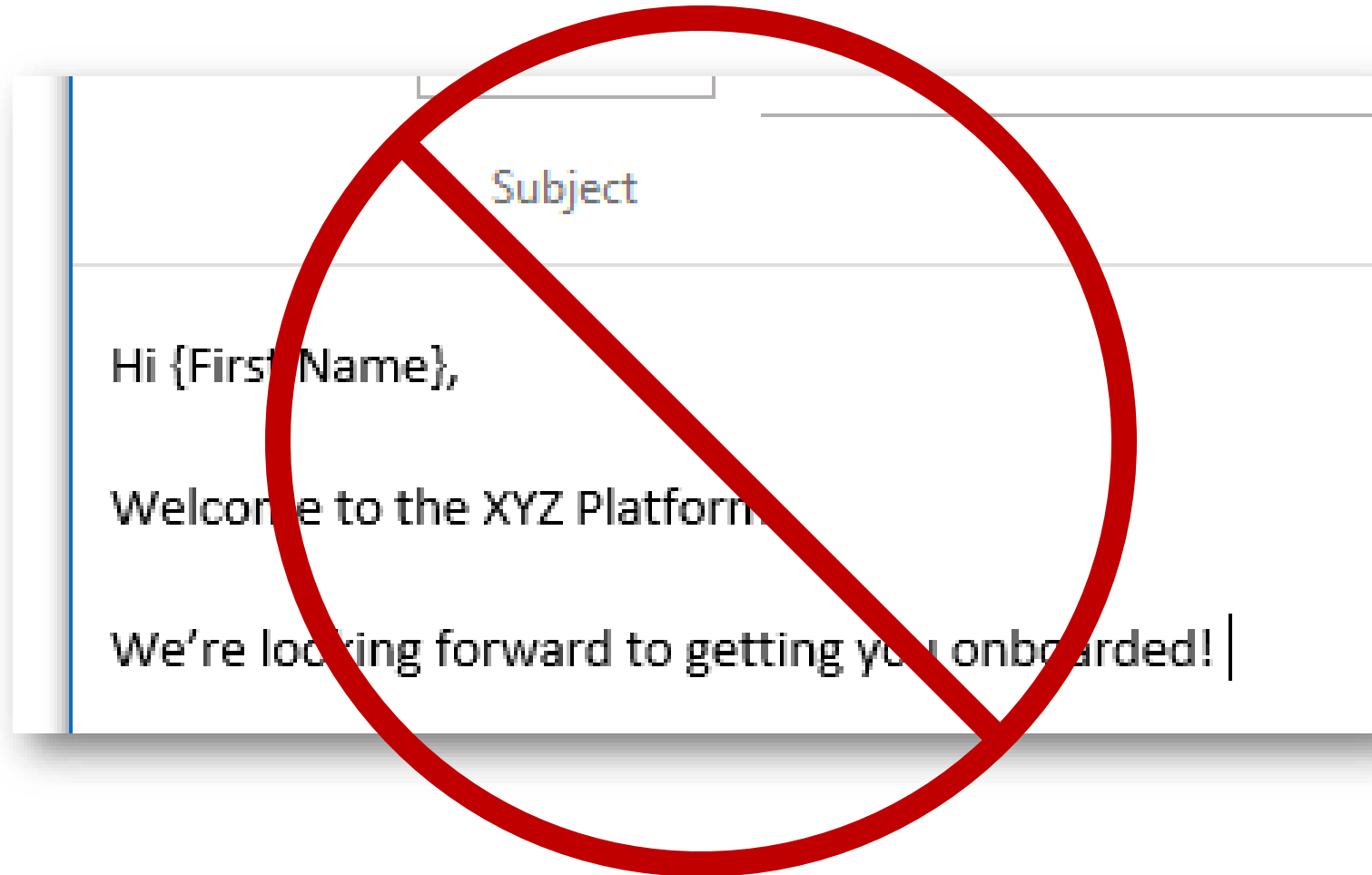
Personas

Role of user
Size of company
Desired outcome/goals

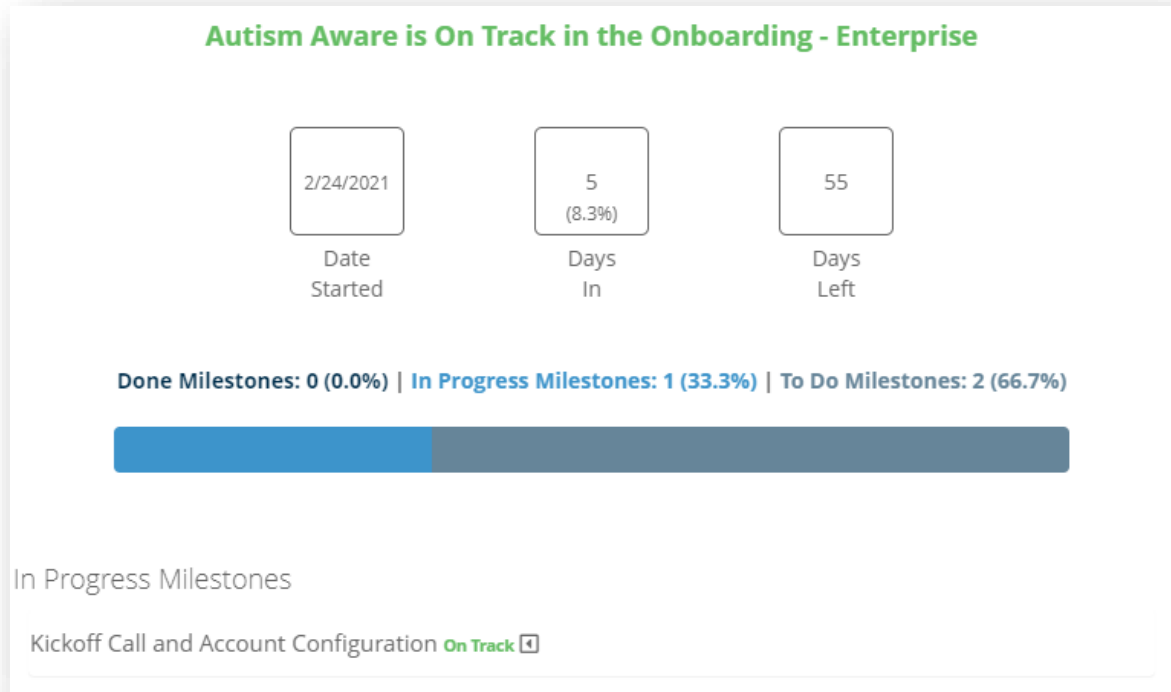
Usage Data

Login frequency
License utilization
Time spent in application
Depth of adoption
Breadth of adoption

What Does Your Welcome Email Look Like?



Enable Self Sufficiency



Provide a clear path to success

Tactics

- Online Training Videos
- Public Training Sessions
- Customer Communities
- Success Plans

Activation vs. Ah-Ha



Connect with 7 friends in first 10 days
Chamath Palihapitiya, Former Head of Growth



Save 1 file in folder on 1 device
ChenLi Wang, Former Growth



Follow 30 users
Josh Elman, Former Head of Growth



2000 messages sent within a team
Stewart Butterfield, Co-Founder and CEO



Returning 1 day after sign up
Nabeel Hyatt, Former GM



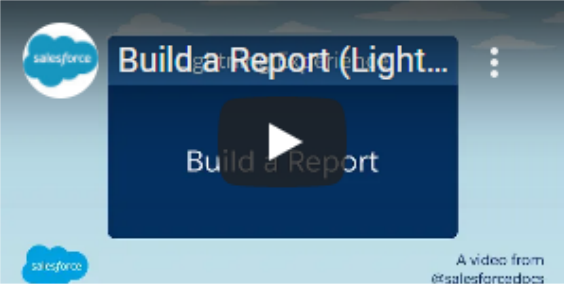
X connections in Y days
Elliot Schumkler, Former Product Manager

B I U A 14 [Icons]

Hey **{{ Contact First Name }}**,

Noticed you had an error trying to build your first report. Sorry to hear that.

I included a 2 minute guide on building your first report.



I hope you find this helpful.

Identify the “Oh-No!” Moments

Where are the pitfalls

Immediately provide a solution


How to Keep the Excitement High

Checklists & progress bars

Set expectations

Give customers a sense of achievement

Gamify the experience

Onboarding Checklist 

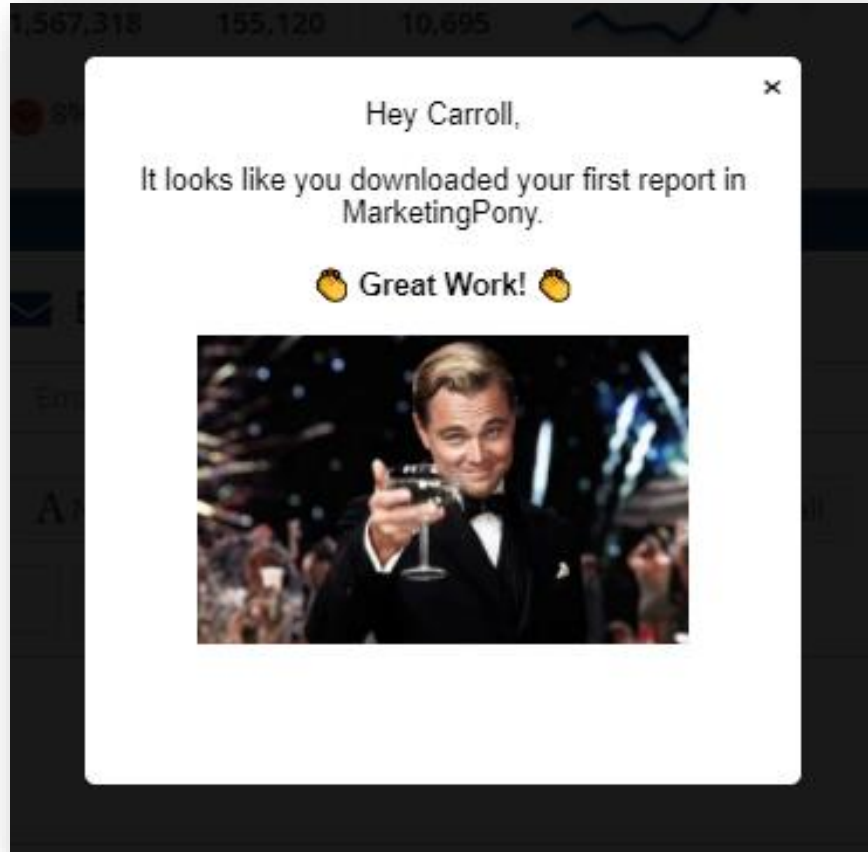
Account Set Up ▾

- Watch Introduction Video
- All team members have logged in ⓘ
- Fill out implementation worksheet

Training ▾

- Complete Training #1
- Complete Training #2
- CRM setup is complete ⓘ

How to Keep the Excitement High



Positive reinforcement

Reward customers for completion

Demonstrate the value to non-daily users

Use data to empower customers

Drive customers to the “Ah-ha”

Keep excitement high!

Takeaways

An abstract graphic on the left side of the page consists of several thin, curved lines in various colors: yellow, orange, red, purple, teal, and grey. The lines originate from the bottom left and curve upwards and to the right, with some lines crossing each other. One red line has a small red dot on it.

Q&A

IMPACT WEBINAR

CS Everywhere: Leveraging Insights in Salesforce, Slack, Teams, Zendesk, & More

Tuesday, March 23rd at 1PM ET



Spiros Theodore
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Thank You



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Contact Us

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POLL

Ask a Poll Question Here

1

Dedicated tool: CS platform
or BI Tool?

2

Salesforce/CRM reporting

3

Excel/Google Spreadsheets?

POLL

What does your customer success Dashboard look like?



Low Touch Coverage Models

Too many customers

No visibility

Difficult to prioritize onboarding



Headline Sample

Text goes here
Screenshot goes there →