

# 5 STEPS FOR BUILDING A GREAT CUSTOMER ONBOARDING PROGRAM



## Start by defining “success”

“The goal of your onboarding program is to get every customer to this milestone as quickly and painlessly as possible. If you don’t know what your customer success milestone is, just ask your customers!”



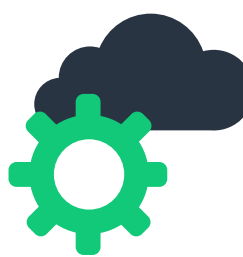
## Set goals and build your team

Whether you’re working as an individual or a team, the key to success is staying focused on your goals and not getting distracted. Your ultimate goal is to provide customers with their first win – that “success” moment.



## Map the customer onboarding journey to milestones

Make sure your onboarding journey has the fewest required steps. These are the ones you should focus on: signup form experience, welcome communication, first login, product tutorials, documentation.



## Select the technology

Whether you want to provide a simple onboarding experience or a segment-based one, choose an onboarding platform depending on your products and goals. Make sure you can customize every touch point.



## Edit, test, launch and evaluate

Create a list of the metrics that you’ll monitor to evaluate your onboarding program. Some of them could be: interactions, feature adoption, feature usage, customer sentiment, trial conversion, onboarding cost.