



Best Onboarding Experience  
starts with understanding  
your customer

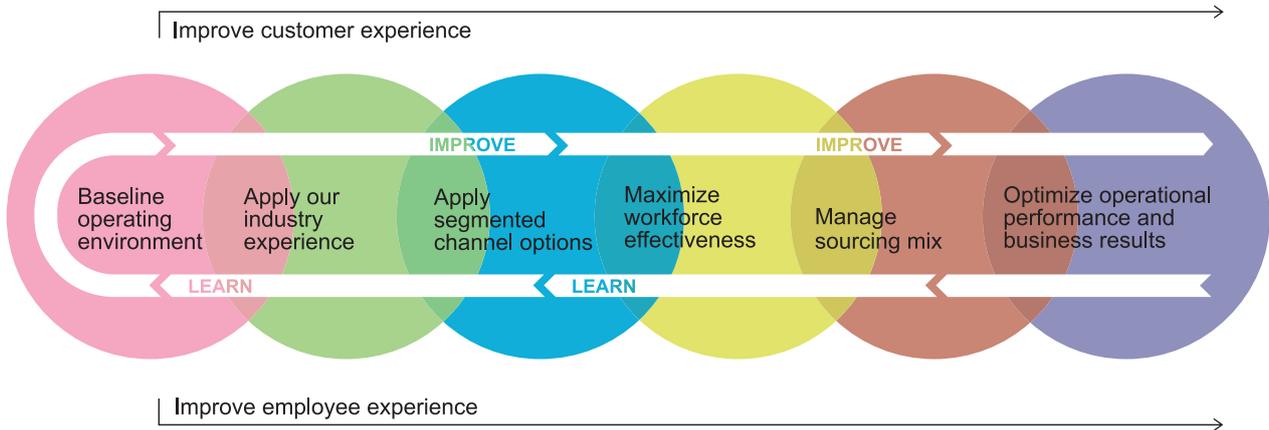
# Introduction

Onboarding is a jittery and nail biting period. Customers want the best Vendor! Vendors want the customer to sign up with them. Onboarding doesn't just associate both parties for the task at hand; it also brings to the fore their individual missions, work cultures, reputations and so on. So much is at stake in this venture and hence the need to succeed.

Onboarding is an opportunity for you to show how much you value the customer. This is the time for you to push the boundaries of expectations, rewrite management practices or use disruptive technology, and anything else just to provide the experience they haven't even imagined. Earlier, Onboarding was to:

Conceptualize - Execute - Hope.

Now, underpinning them is a customer experience delivery that is of excellent quality, empathetic in communication and adds extraordinary value. This article explores the realm of customer onboarding, which you can use to gain insights on how to provide the best customer centric onboarding experience.



## The Trial Period: Customer Experience

The trial period of onboarding is a delicate time. Research shows that customer experience journey is important in driving results as they predict the desired outcomes. This in turn affects the revenue and customer retention. You have to ensure your resources work right on every task to deliver results that satisfy the customer. Probably, borrowing the magic wand from Harry Potter may not hurt in achieving this objective!

### Customer Experience (CX)

Customers are aware you have the best product/service in the market. What they expect is the best experience to go along with your offering. Truth be told; technology has empowered customers to become aware of whom they are interacting with and at what level. Therefore, if you and a giant like Google are competing for projects in same domain, then expect the customer to put both of you through the same sieve. After all, everything is fair in business!

What are the questions customers have when evaluating you vis-à-vis others?

- What is the company's standing in the market?
- What do its existing or previous customers think about it?
- Is it financially stable?
- What do the company's employees think of it?
- What support system does it use? Is it prompt in responding to customer queries/issues?
- How forthcoming is it in communicating with its customers and the market?
- What are the growth plans?

Creating a customer focused and rightly managed end-to-end customer experience journey will address their concerns. Bringing your technology, processes and culture together to accomplish this goal can tilt the scales in your favour.

According to a report published by McKinsey\*, companies providing exceptional customer experience reap 26% more in gross margins than their competitors; riding on positive internal performances such as reducing costs 15 to 25 per cent within 3 years, and clocking 5 to 10 per cent revenue growth.

## What an Effective Onboarding must Achieve

To leave lasting impression on the customer you must ensure to tick off the following pointers:

- Deploy solutions that are customer centric and futuristic
- Establish a customer interaction portal accessible by mobile devices
- Digitize processes (self- help troubleshooting information, online interfaces, intuitive forms filling etc.).
- Rapid deployment of Support tools and advisory
- Comply with all regulatory norms and processes
- Treat customer data with utmost care
- Regularly communicate status updates
- Automate to ensure speed and reuse of repeated processes
- Document every workflow, stage, processes, technology etc.
- Provide effective customer focused training
- Manage all the processes end to end with utter transparency and accountability

Overall, provide a holistic and satisfying onboarding experience.

To achieve these outcomes it is imperative to have a strategy that is systematic, and provides feedback regularly, so you have a pulse on the operations. For, the onboarding journey is not without its challenges, as the next section explains.

## Challenges to Onboarding

Customers use the Onboarding period to gauge the challenges you encounter and how soon you can resolve them. Here are a few challenges you are likely to face.

## Challenges to Onboarding

Insufficient understanding of the customer:	this arises if you have not engaged with the customer either in one to one or through various forums to understand them, not just their need for a solution.
Diverse Communications:	this issue arises when departments communicate differently (tone, replying TAT) prompting the customer to think if they are dealing with different companies.
Non-aligned Functional groups:	working in silos may make you ignorant of what the other teams are doing or if they are working on the same issue as you are. Imagine what the customer might think if they receive different responses for the same issue?
Regulations:	all regulations need to be studied and complied with, else both you and customer are at risk.
Data:	not handling customer data correctly can make them jittery. Data is wealth and customer would expect you to treat it like gold, anything short of that can make customer shun you.

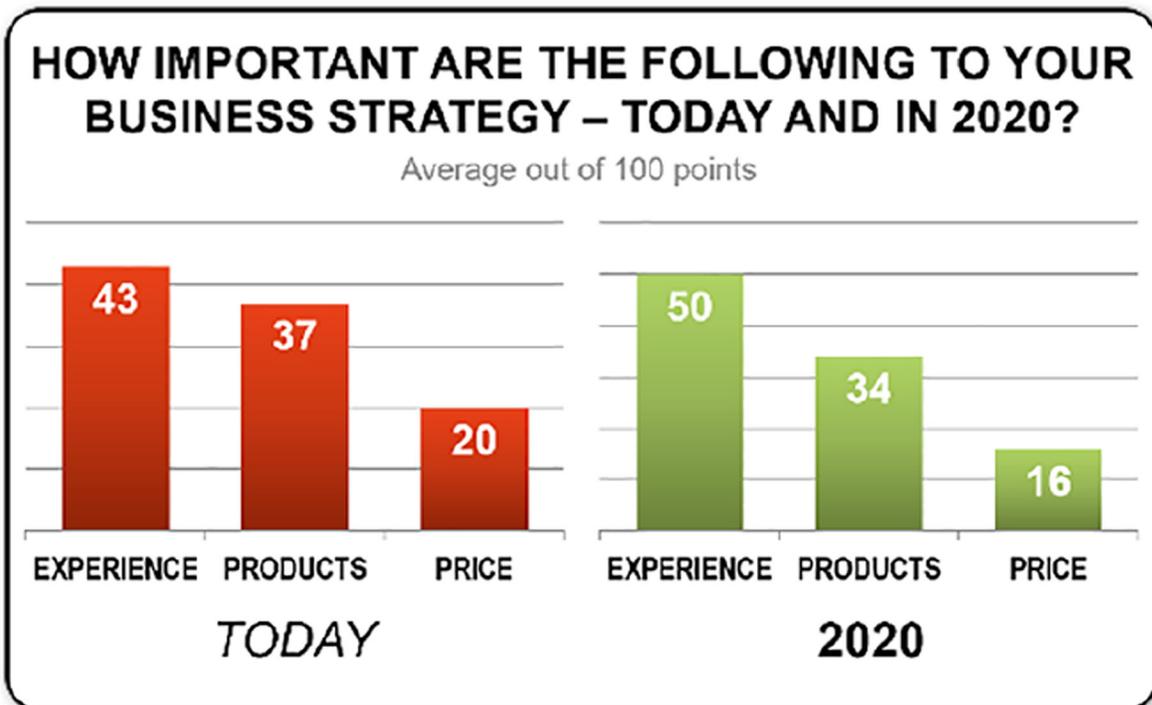
## Providing a Satisfying Onboarding Experience

It is time to walk the Walk! With a firm focus on the outcomes, you must set measures that must span the entire onboarding journey. Documented in this section are a few suggestions that can help plan the Onboarding experience solution.

### Establishing Roles and Responsibilities

It is important to identify/establish the various roles in you that will participate in the onboarding process. Customers should be able to experience someone like VP of Customer Success who is responsible for putting in systems and process in place to provide the best possible customer experience to their clients. They play a bigger role than a customer account manager who handles customer accounts. He is responsible globally to ensure that they retain and delight their customers with the right platform and process.

- Identifying resources contributing to this project across departments
- Documenting team hierarchy or structure and communicating to departments
- Ensure that the sales team is in the loop for the entire onboarding cycle so that the transition is seamless and effective for the customer
- Conduct initial meetings with the customer's team
- Create a roadmap (contain scope of work) from the data obtained from both customer and you
- Conduct meetings between you and customer's team where the roadmap will be discussed and agreed upon by all parties
- Set up systems to communicate project updates, call for meetings and troubleshoot issues
- Preside over each task to be performed by organization resources
- Coordinate with customer to procure requirements for each task/ stage and communicate progress of the tasks
- Conduct update meetings with customer point of contact to apprise him/her of project status and resolve issues, if any



Source: Customers2020 Report, Walker Information Inc.

One overarching conclusion of this is that a personalized customer experience will increasingly be the key differentiator in B2B markets in the coming years.

- Communicate status updates through customer approved mediums Most of the time this role's responsibilities transcend beyond the trial period, that is, if the customer chooses you over other competitors.

### Role of sales in the customer onboarding

The role of sales and their accountability do go beyond just the closing of the deal as they are expected to assist the customer engagement manager in terms of successfully onboard the customer. The rationale behind this cross functional engagement is to ensure that the customer is a qualified prospect and their expectations are aligned well with the company's products and services. The outcome of this engagement definitely eliminates the risk of customer churn and their relationships will sustain for long term. As a company in technology industry and specifically in SaaS domain a small percentage of churn can have a major impact in terms of revenue, profitability and valuation.

It is sales team's responsibility to ensure that the customer is

- Not passive - who doesn't update the subscription
- Not a proactive - who cancels the subscription because he or she is not happy with some aspect of the product or service
- Not an intended - who asks for refund after using the product because the sales would have promised for money back guarantee
- Not a satisfactory customer - who discontinues after achieving the desired results

Customer engagement manager can deal with such anomalies only if there is a sustained effort from sales staff to retain the customer for successful retention

These insights can definitely give a milestone for CAM to onboard the customer in stages. They will know what kind of marketing strategy they need to come up with so that they can strengthen the relationship. At the end of the day every business want to gain competitive advantage and grow and if the customer is convinced that you can deliver that outcome then the relationship will move up from being a customer to partner.

### Develop an understanding of Customer

Customers expect high standards throughout their association with you. Today's explosion in information dissemination channels has made it easier for customers to be aware and share experiences of vendors. You need to marshal your resources to go out and learn more about the customer. Then it becomes easier for you step into your customer's shoes and see what they want to achieve by associating with you.

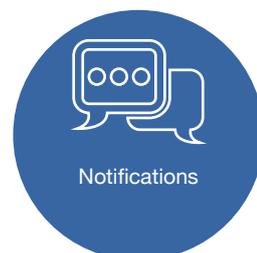
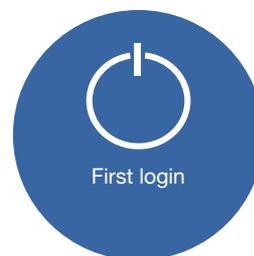
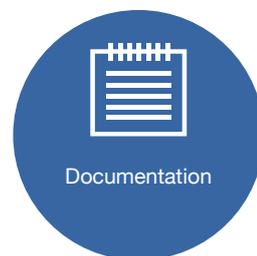
### Communication

The CAM role bears major responsibility in keeping customer well informed. If there is a requirement for multiple resources in the organization to talk to the customer then they must be trained properly on the nuances of communicating and sending a homogenous toned message. Customers can clearly spot inconsistencies in the way different departments communicate with them. Detect and resolve it before customers' impression makes its way into social media, forums etc. Communications must be compatible with all devices approved by customer.

Establishing a portal for customers and your resources to interact and update will be helpful. It aids transparency as all work performed,



## Elements of SaaS Customers Onboarding



issues logged, resolved-unresolved, meeting notes, feedback can be posted to keep all stakeholders informed.

#### Help from Automation

Automation helps in faster execution of tasks leading to better decision making. It can be applied in the Onboarding at appropriate stages like standardizing processes, integrating systems, managing risks, controlling information dissemination etc.

It must be noted that digitizing processes and systems, like self-help, automated logic, auto populated forms (when uploading documents), online interfaces etc. helps in faster turn-around times while lending to accountability as well. Needless to say, costs involving delays can be reduced leading to more revenue.

#### Measuring Efforts

A lot of interactions and engagements will take place during the onboarding. Therefore setting up systems to monitor the data generated will help in monitoring progress of the project. Surveys, reporting, quick feedback forms etc. can also be added

to supplement this effort. You must have data of your onboarding ecosystem to make insights and predict health of the onboarding process. This measurement will be used to study and improve tasks. Since it involves a human element, the concerned resource must be trained, encouraged, or rewarded to keep the moral high and execute tasks efficiently.

#### Conclusion

Trial period is a great time for customers to sample your offerings; but they are doing the same with your competitors too. The trial period will eventually have to come to an end and the customer will sign up for one firm. Apart from money aspect, it is in your interests that the customer Signs up with you because your vision, work and standing in the market must naturally indicate that you are the best fit. You need to gain their trust with focused strategies, deep involvement with every stage, positive results and prompt communication.

*Credits:*

*\* Customer Experience: Creating value through transforming customer journeys- McKinsey&Company*

## About Tarams

Tarams is a technology consulting and product engineering company that helps clients transform their mission critical business applications to digital platforms. With over a decade of experience, we offer robust technology solutions to attain performance optimization, revenue generation and cost savings to some of the Fortune 500 companies. Tarams takes an agile and collaborative approach across the value chain and provide you a strategic advantage.

#### For more details:

✉ sales@tarams.com

☎ +1-212-655-9638

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