The Five-Finger Approach to Onboarding

And no, it is not using those five fingers to pull out your hair.

Whether it is users or projects, onboarding is the most critical component of your client's lifecycle. After the contract has been signed, and before the payment has been collected, those days, weeks, months, or years can be a make or break moment for your company's products or services. As a group who provides the software tools necessary to manage the contracts to cash process, we onboard users daily, and we have learned some important tips if you want to be successful when onboarding new clients and/or projects.

Tip #1:
Know Where You Are Going, and Make Sure They Know Also

You have onboarded countless projects and users in your lifetime; and you know the process from A to Z; however, do your clients? Unless they are former employees or clients, it is a safe bet that they are new to your processes, and it is important they know what to expect, and when to expect it. After the contract is signed, it is important to set goals and deadlines for you and your clients. It keeps everyone accountable and prepared for the road ahead; while avoiding wasting the most critical resource, time. Be sure that your goals and objectives follow the **SMART** concept.

- **S**pecific: Who, What, Where, When, and Why
- **M**easurable: Can you quantify the objective?
- **A**chievable: Can the objective be accomplished?
- **R**ealistic: Is the objective practical?
- **T**ime-Bound: Set a timeframe when the objective can be completed.

If a project fails, 35% of the time, it fails because of inaccurate requirement gathering[1]. If you do not know where you are going, it is going to be difficult to get there. Businessman and author Stephen R. Covey said it best, “Begin with the end in mind.”

According to Forrester, 66% of adults believe valuing their time is the most important thing a company can do to provide a good online customer experience.[2]

[1] Business 2 Community
[2] Forrester

Tip #2:
Ditch the Cookie Cutter

No one wants to be just another number in your user count, or project in your weekly projects meeting (yes, we have those too). Every customer is different, as is their situation. Often times your clients are specifically paying for your expertise and your team's time. They could have gone anywhere, but they did not. It is vital that your clients are just as important as they were during your sales process before the contract was signed.

Sure, as we mentioned before, it is important to have set processes and steps that are universally accepted. On the flip side, it is important to realize that you are working with people, and people appreciate having processes that are tailored to their specific needs. Here are a few creative ways you can personalize your interactions:

- Create personalized emails (if possible, use a mail merge template to save time)
- Welcome messages (customize your onboarding documents and have your CEO/Owner sign it)
- Videos that provide value (categorize them by type, and build a video library)
- Create online communities to allow for client to client connections (we found great success in creating client Slack channels)
- Build events that are tailored to clients at every stage of the process
- Have your sales team schedule 30-60-90 etc. day follow-up calls

59% of customers value personalization over speed when it comes to customer service.[3]

[3] Hubspot

Tip #3: Provide a Shoulder to Lean On

Your clients are with you for a reason. We will make a big assumption here and guess that they likely had a situation and you offered a solution. Even with the best solutions, there are bumps along the road and nothing is a 100% fit. Offer your clients the support they need when they need it. This long-tail approach is less profitable in the short term, but the long-term ROI through repeat buying and referral work is astounding. Remember, in this part of the client lifecycle, the contract has been signed; however, you might not have been paid in full yet, it is important to provide your solution successfully.

In addition to doing a bit of firefighting, be sure to offer content that may help avoid hiccups in the first place. Whether it is live chat, a robust help center, or reoccurring webinars; be sure they have the tools necessary to succeed. A few resources that we provide, that have proved successful are:

- **Personalized Welcome Email Campaign:** As mentioned in Tip #2, we have found that offering new clients/users a personalized (name, company name, title, etc.) welcome email drip campaign that provides the basic step-by-step guide to get started, with updated videos, helps users get onboarded even before the first project call.
- **Step-by-Step Walkthroughs:** Whether you have a homegrown tutorial system or utilize a third-party like Pendo (who we have partnered with), it's important to offer that tactile learning style that some users benefit from, that just can't learn through videos or phone calls.
- **Updated Help Center:** We had to make sure the word, updated, was included in this one. Many Software and IT groups provide a help center or resource center; however, it is sometimes a one and done help center, that does not get the regular updates it needs. If your product updates monthly, then your help center should at least be updated monthly.
- **On-Demand Webinars:** We began with creating live webinars every week, and quickly realized a few things. One, our schedule hardly aligned with our clients (we were global after all), and two, there were many times our clients would want to pause a webinar, break it up into pieces, or share it with a co-worker that could not attend. Our solution, record a webinar, make it as perfect as possible, then share that link for users to watch at their leisure. This freed up more time for our Client Success Managers and offered flexible support for our clients.

Tip #4: Keep Everyone in the Loop

What causes most client and user onboarding to fail? Well as the Captain once said, "What we have here, is failure to communicate." This goes along with Tip #3, make sure that everyone is on the same page. Check in regularly with your clients, and make sure that they are on track. One thing we have learned over the years is that no news, is not always good news. Respond to every email, answer every call, and if they do not initiate a conversation, pick up the phone and start it yourself. Regular progress emails and reports offer transparency in how hours and training are progressing. Another great tip, engage with more than just your PPC (Primary Point of Contact), as it is likely that there was more than one party that bought into your product/service and signed the contract, make sure everyone is up to date with where they stand.

Pro Tip: Another thing we have found extremely successful was creating a customer facing project view portal for our clients to use for managing their client's projects. These portals include:

- Timelines, Milestones and Tasks
- Participants with Contact Information
- Notes: It is hard to track emails, papers, and document comments, log your notes in your portal instead.
- Files: Similarly to emails, dozens of attachments can get complicated fast, having a document manager reduces headaches and lost files.
- Discussion Threads: Think Slack, but in the context of a specific project, without the distractions of others that are not involved in the project.

Most people are familiar with paying bills and engaging with vendors online these days, and you should take advantage of that!

Tip #5:
We have All Been Onboarded At Least Once

We have all been a new user/subscriber once. Heck, if you are reading this brief eBook, then we know you have subscribed at least to this channel, and if you got the email, then you were a new user to whatever email provider you chose, and then... well you get the picture. Onboarding new clients can be frustrating to you and your team. You might get loads of bad data about new prospects, or perhaps false expectations were set during the sales and marketing process; either way there will likely be at least one hurdle to overcome. Our advice, do not take it out on your clients. Onboarding is hectic for all parties, and the reason they are being onboarded is because they already had a situation before they came to you. Do not be another churn statistic. Be the resource that case studies and testimonials are written about.

Speaking of churn stats, 80% of people have deleted an app because they did not know how to use it.[4]

[4] Wyzowl

Wrapping Up

Many of these tips do not require an engineering degree to understand; however, sometimes it is best to just reassure yourself that onboarding new users and projects can be a complicated scenario, and following these five tips can prevent you, your company, and your clients from pulling their hair out on the next call/email/text/etc.

Who is Aysling?

You are probably wondering, who is Aysling? Why are they talking about onboarding users and projects? Well that is a great question. Aysling is a cloud-based B2B PSA SaaS platform that assists Professional Service and Software & IT groups manage their back-office operations. Aysling provides the tools necessary for contracts to cash management. Features include everything from Sales & Order Management, Project Management, Workflow Automation, SaaS Subscription Management, to Billing & Financing. Have a tool that you cannot let go? Do not worry, Aysling offers dozens of dedicated integrations, a Zapier integration, and an API that works well with others; plus, Aysling also houses a terrific software engineering team that has built our products from the ground up, and are experts when it comes to adopting new processes.

Manage Your Contracts to Cash Processes with Aysling

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