

8 Tactics to Onboard & Engage New Customers

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Customers that have great early experiences are much more likely to be loyal than those who have a hard time onboarding, or worse, never really engage with your products and services. Some organizations delight customers from the first moment:

- Uber can have a car in front of your door within minutes of entering your email address and credit card information.
- Top restaurants like Thomas Keller's French Laundry bring out an amuse bouche, a little treat, the minute you arrive, to get you in the mood for a great dinner
- Pandora requires only a single song to begin delivering a customized music station

If you want to set up your customers for success, you need to think of the sales transaction as the starting line, not the finish. This is especially true if, like most fast-growing companies, your business model includes elements of community and/or subscription pricing. In these situations, the customer needs to engage with your organization, and needs to recognize value from the start.

Why Onboarding Matters

Onboarding offers new customers a roadmap for how to get the most out of their relationship with your organization. Similar to employee onboarding, membership onboarding ensures that the member has the knowledge, habits and cultural mindset to be successful in this new community.

The Onboarding Gap

Many fast growing companies have sales organizations, and account management teams, but no one truly focused on the onboarding process. As a result, many customers are frustrated as they try to learn how to use your products and services, and, by the time they contact Customer Support, they are already really frustrated.

Customer Service Can Bridge the Gap

Customer Service organizations need to participate in defining this critical step in the customer relationship. Customer Service has the best understanding of what can go wrong in the customer relationship—and where the customer will need the most information and support as they begin to engage.

A successful onboarding process has three key steps:

- Removing friction,
- Delivering immediate value and
- Rewarding desired behaviors that will drive member success.

The Onboarding Process

In the Membership Economy, the first task of onboarding is removing friction – anything that slows down a user's ability to engage with the services offered, especially during the signup process. You want to make it easy so you don't lose your customer before they've even engaged! And they're more likely to give up before they've experienced your value, so you want to dazzle them early.

8 Steps for Onboarding

1. **Remove friction/Sign-up (free trial or regular):** Make the process as frictionless as possible. They should get something from you just for providing email address. And if they pay you, they should get something really good!
2. **Welcome/Deliver immediate value:** Make sure they know what they signed up for, thank them for joining. Provide initial value (a song, a gift, a fact).
3. **Engage immediately:** Start a “game” (gamification) to encourage ideal behaviors; connect with others in community.
4. **Ask for feedback:** Call, email or intercept within first week; be ready to listen.
5. **Provide feedback:** Let them know how they stack up relative to other members – time, engagement, demographics – if possible, point out strengths.
6. **Rewarding desired behaviors/Ask for referrals:** Encourage member to invite other friends in first 30 days.
7. **Customize experience using data analytics:** Offer unique elements to experience to demonstrate recognition – focus on continuous tinkering, and not the big reveal.
8. **Transition to nurturing program:** Continue to provide information to help them optimize their experience and connect; communicate in consistent, ongoing way.

The second step is delivering immediate value. Camille Watson, director of marketing in Netflix’s early days, says it was critical that new members got a great experience right away. She remembers, “We knew members couldn’t experience the full power of Netflix until they returned the first three movies and could experience the rapid turnaround in getting the next movie. So we made sure that they picked five movies up front.”

Pandora handles the issue of immediate value a little differently. By choosing just one single song or artist, the user gets to start listening for free to a “station” optimized around that song. Over time, you can add other songs and artists, or simply react to the songs Pandora picks with thumbs up or down.

The third step, rewarding desired behaviors, is about building the habits of successful users of your company’s value. There is significant data supporting the idea that getting someone to behave in a certain way for a certain period of time (such as 30 days) dramatically increases the likelihood that this behavior will become part of the person’s regular life. If you want trial users to become active, loyal members (and maybe eventually to become superusers), you want to acculturate them to these habits. For example, Kurbo Health, the popular weight loss program for kids, rewards kids with points and “status” for logging their food intake as a means of engagement them before they actually can see results on the scale.

How Customer Service Can Create SuperUsers

Onboarding is critical when an organization depends on recurring revenue and loyal customers in order to generate the kind of Lifetime Customer Value they need to be successful. Customers need to have a meaningful experience from their very first day. Customer Service can use their expertise to design a customer journey that goes well beyond “support” to an experience delights and engages customers every time.

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