Creating an onboarding journey for your product?

This checklist can help you nail it

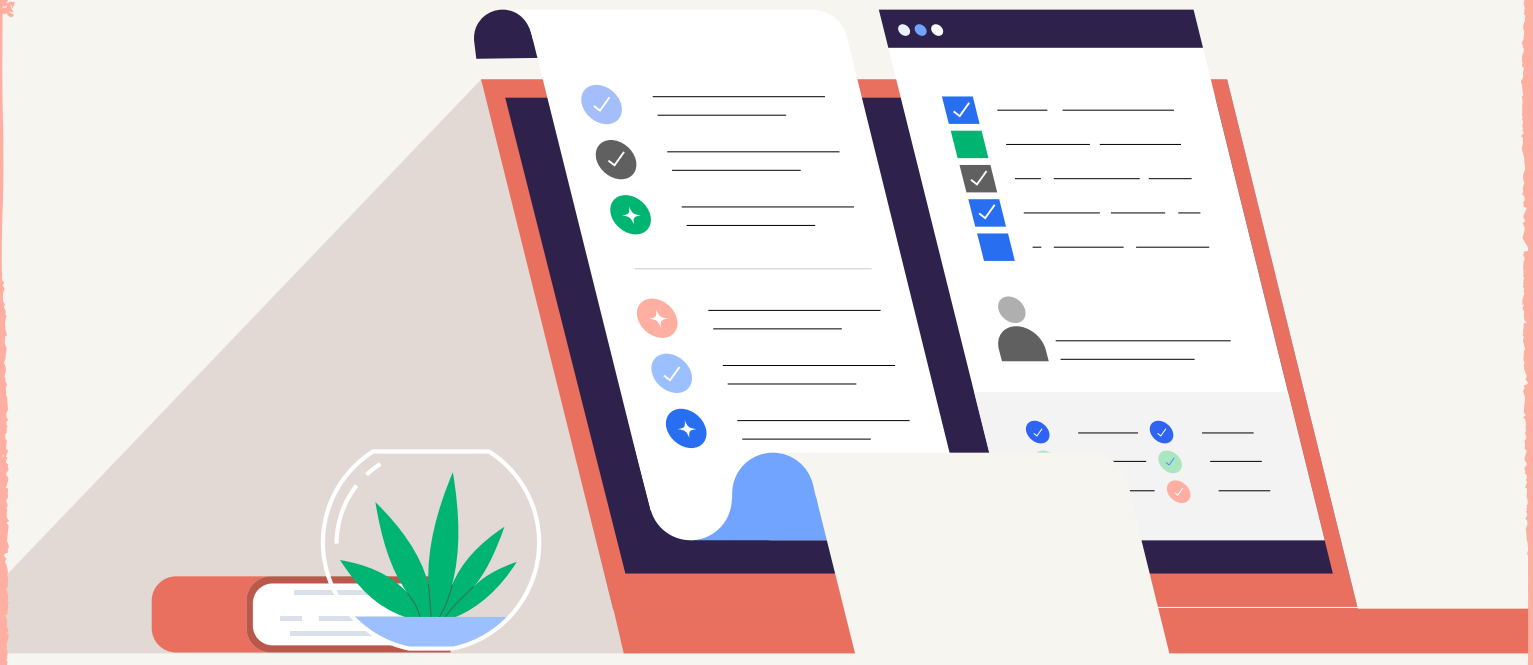

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Table of Contents

The key to a successful onboarding project: planning 4

The 20-point customer onboarding checklist 4

1. Scope, Requirements, Resources 4

2. Value Realization 5

3. Stakeholder Engagement And Management 5

4. Methodology 5

5. Documentation And Project-tracking 6

> “You will never get a second chance to make a first impression.”
>
> **– Will Rogers**

While effective customer onboarding in SaaS is the best way to make a great first impression, it has the potential to be much more. Think about it: the most common reasons for churn in SaaS are that customers don’t understand the product well enough, and they don’t see any value in it. Customer onboarding done right can solve both of these issues, besides saving you time and effort in the support phase.

Onboarding is tricky since all customers are unique and have their own definitions of success depending on their business, team, or use case. Consequently, no two onboarding plans will ever look the same. However, they all need meticulous planning for each aspect and stage of the onboarding process. It is especially important in high-touch or concierge onboarding with multiple touchpoints — where missing (or messing) even one of them could jeopardize the entire project.

The key to a successful onboarding project: planning

There can never be a one-size-fits-all approach to customer onboarding. Customizing onboarding experiences to the needs of each customer can be daunting. However, an effective onboarding experience combines a solid first-principles approach and best practices with individual customer needs.

The best way to do this is to plan and design the onboarding process for each customer thoroughly. A good tool to have at this stage would be a checklist that makes sure you cover all aspects and phases of the process — both at your end and the customer's end.

We have put together an onboarding checklist covering all aspects of the process, from project goals, scoping, and methodology to change management, stakeholder management, documentation, and communication.
If you're looking to develop an onboarding plan, this 20-point checklist is a great starting point. If you already have an onboarding plan in place, use this checklist to see if it covers the five elements of successful customer onboarding.

The 20-point customer onboarding checklist

1. Scope, Requirements, Resources

- [ ] Are the project goals understood and formally agreed upon by key stakeholders?
- [ ] Are the scope and requirements frozen?
- [ ] Are the solution and technical architecture confirmed to align with the customer's goals and internal practices?
- [ ] Have you received compliance clearance/signoffs from the customer's infosec and IT teams?
- [ ] Do you have a formal/written commitment from the customer for resource(s) availability as per the scoping timelines?

2. Value Realization

- [ ] Are the goals mapped to ROI? Do you have a framework to capture and showcase ROI at different stages of onboarding?
- [ ] Is the baseline scenario captured for all of the above?
- [ ] Do you have the first value and Time-To-First-Value (TTFV) identified for all users or cohorts?

3. Stakeholder Engagement And Management

- [ ] Do you have a defined path and cadence for engagement (not necessarily 1:1) with each key stakeholder?
- [ ] Do you have communication channels identified for each stakeholder type and group?
- [ ] Do you have the protocol laid out for conversations and clarifications, status updates, troubleshooting, and escalations?
- [ ] Do you have a feedback mechanism built into your communication and engagement strategy?
- [ ] Do you have a way to ensure accountability from the customer's end?

4. Methodology

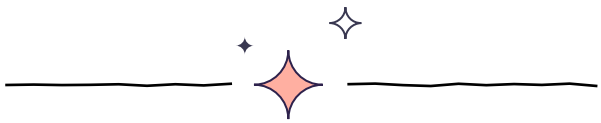
- [ ] Do you have a defined methodology for execution with timelines and milestones?
- [ ] Does it account for:
    - [ ] Integrations, configurations, customizations, and setup?
    - [ ] Migrations?
    - [ ] Training?
    - [ ] UAT/any other testing?
- [ ] Do you have systems and tools to assign, track, communicate tasks and follow up on them?

- [ ] Do you have training and user education modules scoped and developed for different sets of users?
- [ ] Do you a roll-out and adoption plan in place?

5. Documentation And Project-tracking

- [ ] Do you have all the documents (SOW, scope and requirements document, project plan, project charter, kick-off deck, goal alignment, test plan, customer FAQs, etc.) saved centrally? Have you built versioning and visibility into the customer-facing documents?
- [ ] Do you have ways to ensure visibility of the progress of tasks as well as risks, lags, deviations, and blockers?

Once you've completed your onboarding, review the checklist. Ask the team what worked and what didn't, and tweak the checklist based on their feedback.

No matter how good your solution, if your customers don't get around to using it, they'll never know for themselves. We hope this checklist helps you plan and improve your customer onboarding to help you deliver the maximum value to your customers each time, every time.

Rocketlane, a collaborative platform purpose-built for customer onboarding, allows for creating and assigning checklists to the individuals concerned. Give it a spin!