Fueling growth with SwayTech's Tactical 20.

Tactic #15

Roll out the red carpet for customers.

Sway Tech.

Customer Onboarding Programme.

Why?

Think of onboarding as rolling out the red carpet for your customers so they feel valued, understood, and empowered from the get-go.

A customer onboarding program sets new customers up for success, fosters long-term loyalty and helps reduce churn by ensuring your customers are getting the most out of your solution.

KPIs you should have in place.

- Onboarding completion rate

- Time to first value

- Customer satisfaction score

- Customer retention rate

- Free to paid conversion rates (if applicable)

- Feature adoption rates (if applicable)

- Support tickets raised (if applicable)

Step 01.
Onboarding Strategy.

When customers understand the full capability of your product or service, they can extract maximum value from it.

Your onboarding strategy will depend on how you want your onboarding to occur, and the level of involvement you need from your team e.g. fully automated self-service is a no-touch onboarding model; onboarding with email and chat support is a low touch model.

PRO TIP: Get users to use your solution more than once within the first week and then establish a pattern of repeat usage.

Step 02.
Welcome Kit.

Welcoming new customers to your business is more than just a formality – it's a crucial opportunity to set the stage for a long-lasting and mutually beneficial relationship.

Prepare a welcome kit with relevant product guides, step-by-step tutorials, and helpful resources.

PRO TIP: Consider all of the channels you have available to welcome your customers e.g. email, in-app message, physical welcome letter to accompany hardware etc.

Step 03.
Interactive Training Sessions.

Take your onboarding experience to the next level by offering interactive, hands-on training sessions or webinars.

PRO TIP: Great to showcase advanced features, or to address common challenges.

These types of sessions provide a platform for customers to engage directly with your team to ask questions and provide you with valuable feedback and insights.
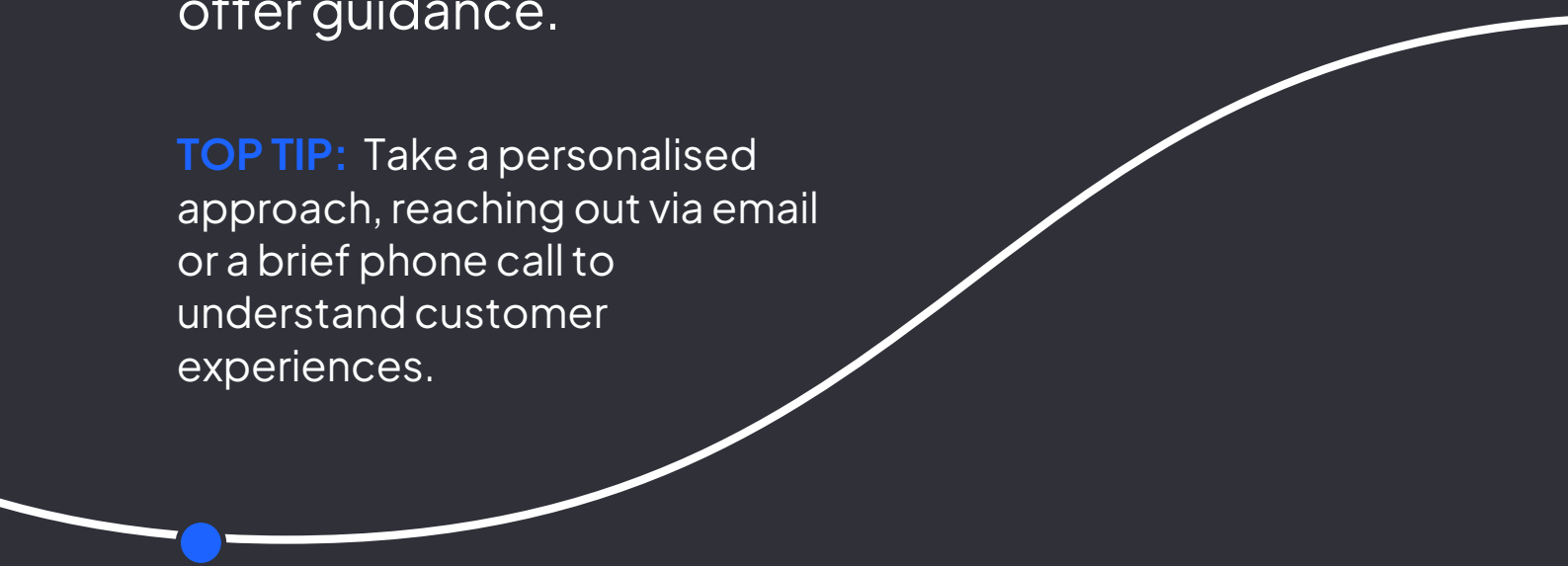
Step 04.
Check-in Regularly.

Initiate regular check-ins at critical points in your onboarding process to make sure customers are on the right track.

Check-ins provide an opportunity to address concerns, gather feedback, and offer guidance.

TOP TIP: Take a personalised approach, reaching out via email or a brief phone call to understand customer experiences.

Step 05.
Celebrate milestones.

Recognise customer achievements when they progress within your product or service with a congratulatory message or a badge as milestones are reached.
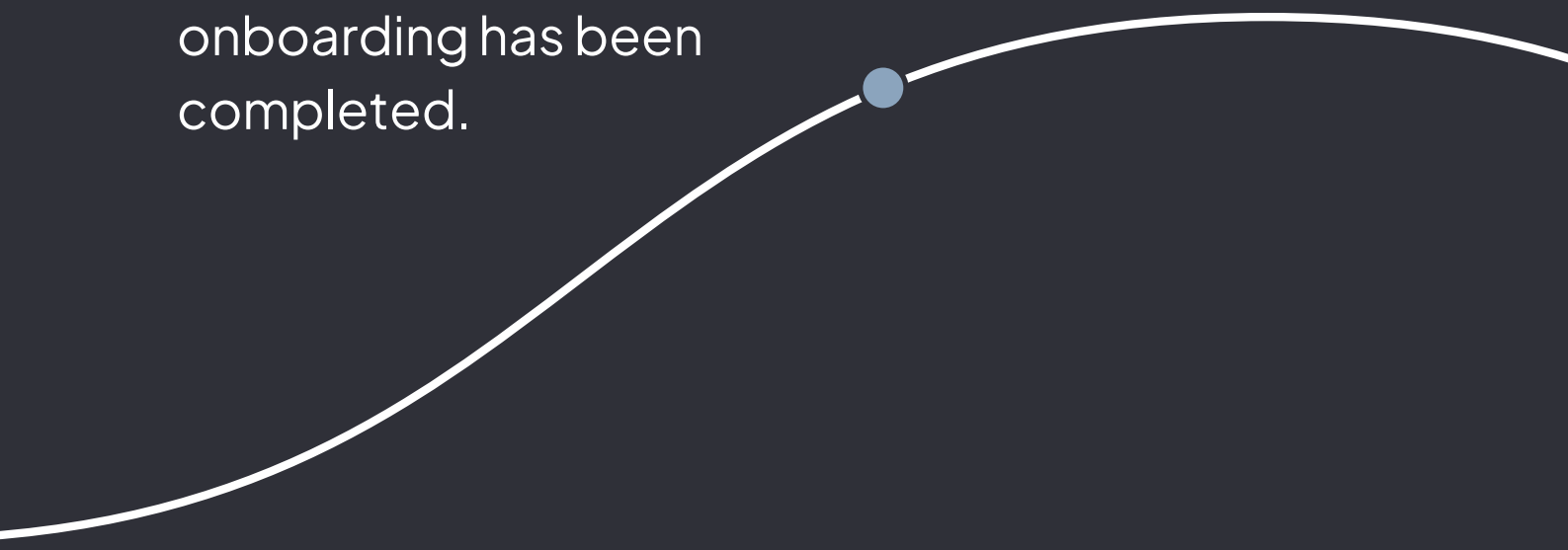
TOP TIP: These key milestones are often the perfect time to gather feedback from customers on their experiences so far.

Continuous Support.

Onboarding is not just limited to 30, 60, or 90 days. It's an ongoing process that requires constant communication.

Customers should get the support they need long after formal onboarding has been completed.

Step 07.
Measuring Success.

Measure the success of your programme by tracking customer onboarding metrics like:

- The time customers took to fully onboard
- Any points in the process that caused frustration
- Rate of product or service upgrades
- Level of engagement. Are customers taking the actions you expected?
- Customer churn rate
- Brand preference score

TOP TIP:
Use this data to refine and improve the programme.

Marketing Healthcheck.

Your first essential checkpoint. This quick but thorough analysis will help you assess and refine your marketing effectiveness and reveal results you may not have expected.

Follow SwayTech on LinkedIn to get notified as we share further tactical marketing plays and Feel free to connect with our CEO Michael.