Use Case: Improve Customer Onboarding Process

Learn how Alchemer can better engage new customers and improve customer onboarding programs with feedback.

Think About It

1. How do you define onboarding success? Is your Onboarding Team defining successful or unsuccessful onboarding?

2. Is your approach to onboarding one size fits all? Or are onboarding sessions tailored to that specific customer?

Challenges

Low product adoption is primarily attributed to customer confusion and slow initial usage: Product complexity hinders customers in realizing their desired functionality. Even with customer onboarding, often there is insufficient follow-up to ensure customers receive adequate training, increasing churn during renewals.

Insufficient information to dynamically change onboarding to meet needs of each customer. Onboarding Teams need to understand customer challenges, goals, and use cases to conduct effective sessions. However, this vital information is inconsistently provided, resulting in generic onboarding sessions that don't resonate with or apply to most customers.

Overview

Function: Customer Success / Onboarding

Sales and Onboarding Teams use Alchemer Survey to collect information at various points throughout the sales and onboarding process and keep track of customer records in their CRM. They use Alchemer Workflow to automate their onboarding process to improve the efficiency and quality of their customer onboarding program.

Integrations Supported

> To view all Alchemer Workflow integrations, click here.

1. Alchemer Workflow HubSpot Integration

2. Alchemer Workflow Salesforce Integration

Solution

After a new customer purchases an onboarding package, a survey is sent to the Sales team to gather the new customer's use cases. Once completed, these use cases and customer details are

automatically sent to the Onboarding Team. Simultaneously, a welcome email is dispatched to the customer from the Onboarding Team, followed by session scheduling, including additional sessions tailored to their product tier and add-ons. Once onboarding sessions conclude, customers are prompted to provide feedback. Alchemer automates all of these processes, enhancing efficiency and providing the team with the information necessary to deliver a personalized and more relevant onboarding experience.

Outcomes

1. Improved Product Adoption

Successful onboarding leads to a rapid deployment of use cases and transforms onboarding participants into product advocates, driving product usage.

Business Impact: Active users increase.

2. Reduced Churn

Effective onboarding facilitates post-session product scaling and deepens customer understanding of the software's value, reducing long-term churn.

Business Impact: Higher customer renewal rates.

3. Revenue Opportunities

Customer needs mentioned during onboarding generate sales opportunities for additional services, integrations, or features.

Business Impact: Growth in ARR.

How to Build This Use Case

> There are many different ways to build a Customer Onboarding Workflow. This is just one example to get you started.

Survey Components

1. In Alchemer Survey, create the following surveys:

- **Onboarding Context Survey.** This survey is intended for the Account Executive that closed the deal. Make sure to ask the following questions:
    - Which department or team is the customer a part of?
    - Could you share some common scenarios where they will use our product/service in their daily work?
    - Are there any specific functionalities or aspects of our product/service that they will find most valuable in their role?
    - Are there any areas where you believe additional training or resources would be beneficial for maximizing the customer ability to use our product/service?
   - Add any additional questions that will help you prepare for a customer onboarding

session!

- **Onboarding Follow-Up Survey.** This survey is intended for the customer that received the onboarding training. Make sure to ask the following questions:
  - Were you satisfied with your onboarding experience?
  - Do you feel confident in using our product/service after the onboarding session?
  - Did you encounter any difficulties or confusion during the onboarding that we should address?
  - Is there any specific aspect of our product/service that you feel uncertain about after the session?
  - Did the onboarding session cater to your specific needs and objectives?
  - Add any additional questions that will help you gauge the success of your onboarding sessions!

- **Post-Onboarding Reflection Survey.** This survey is intended for the Onboarding Team. Make sure to ask the following questions:
  - Did you feel adequately prepared to handle the onboarding process for this customer?
  - Did you encounter any bottlenecks or challenges during the onboarding process? If yes, please specify.
  - Do you believe the customer's needs were adequately addressed during onboarding?
  - In what areas could the team improve to enhance the onboarding experience for future customers?
  - Are there any suggestions or resources the team believes would assist in improving future onboarding experiences?
  - Add any additional questions that will help you reflect on the onboarding sessions!

Workflow Components

1. In Alchemer Workflow, create a new Workflow. Name the Workflow then hit "Next."

2. Scroll down and select the Salesforce Workflow Initiator. In this use case, we want to initiate the Workflow when an onboarding package is purchased.

> For more details on setting up the Salesforce Initiator, refer to this documentation.
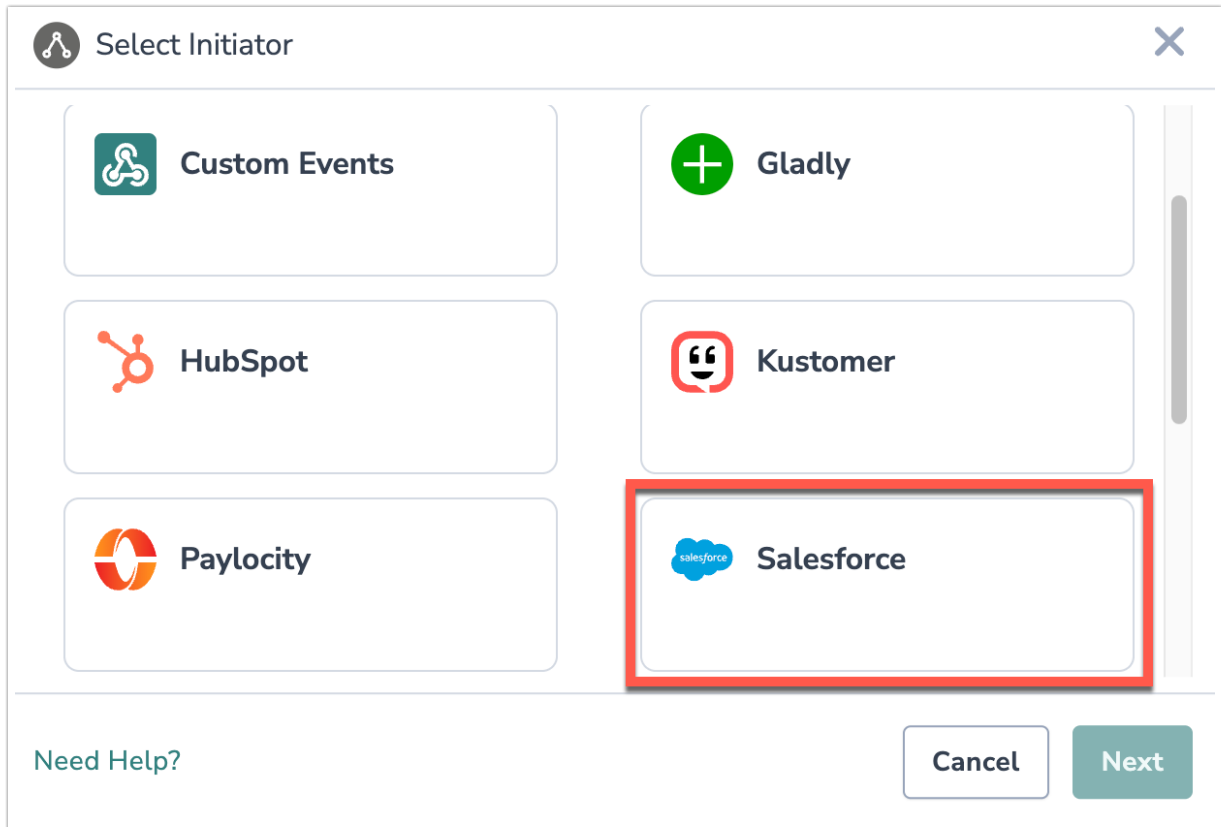
3. Add a Survey Invite step that will invite the Account Executive for that new customer to take the Onboarding Context Survey.

4. Add a Survey step for the Onboarding Context Survey.

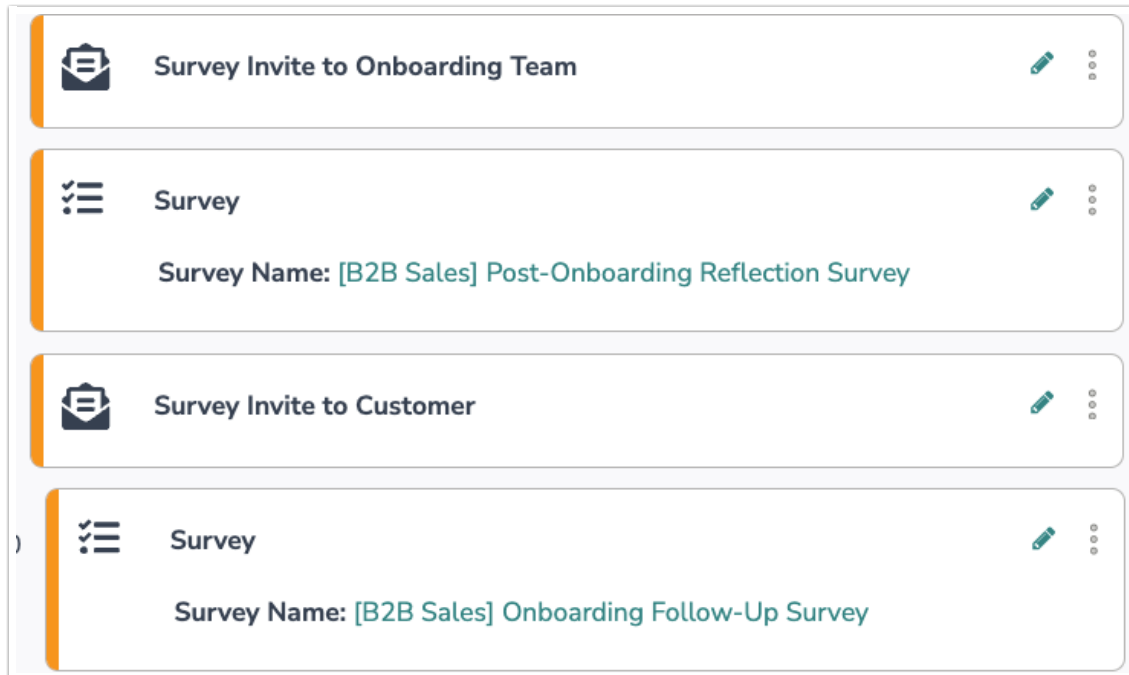5. Add a Salesforce Push step. This Push step will push the survey results into the customer's Salesforce record.

> For more details on configuring a Salesforce Push step, refer to this article.

6. Add a Delay step, that will delay the subsequent step for 14 days.
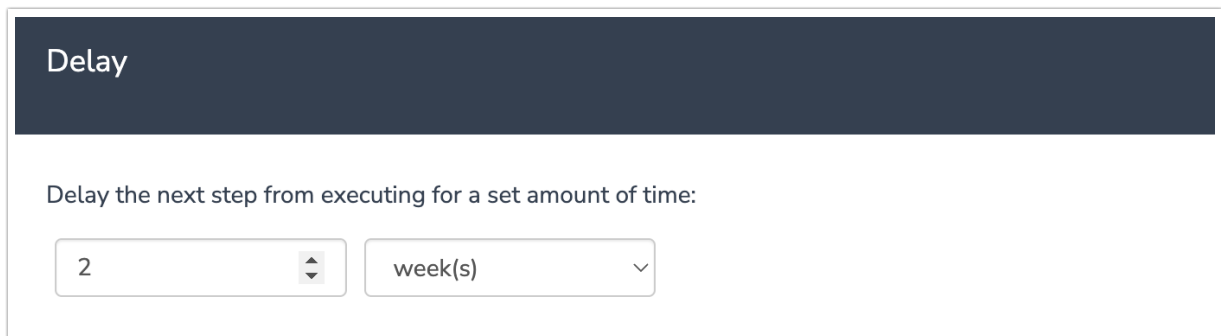
5. Add two more Survey Invite steps with corresponding Survey Steps. One survey will go to the Onboarding Team, the "Post Onboarding Reflection Survey" and the other survey will go to the
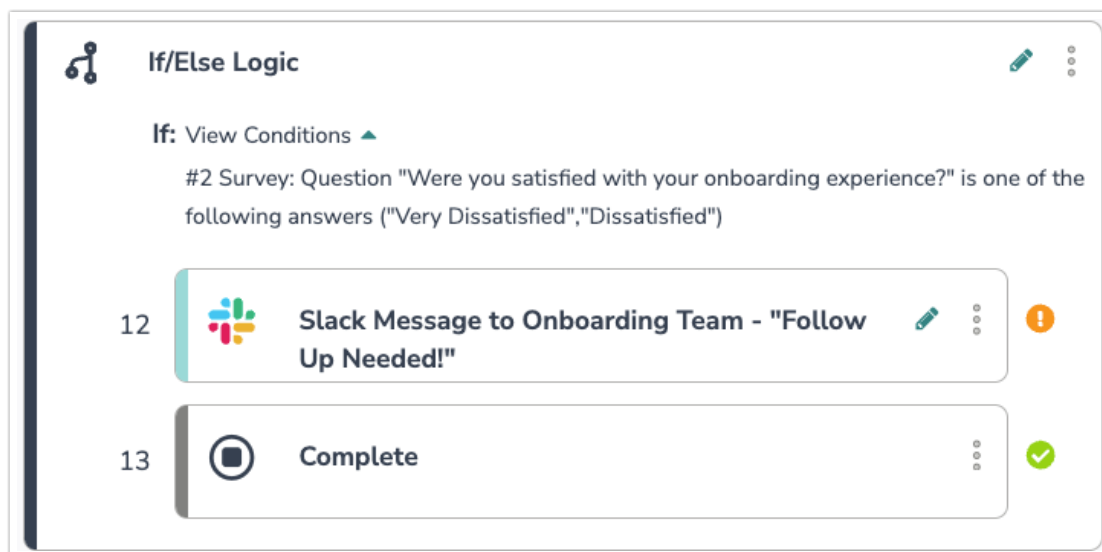
customer, the "Onboarding Follow-Up Survey".

| | Survey Invite to Onboarding Team | ✏ ⋮ |

| | Survey | ✏ ⋮ |
| | Survey Name: [B2B Sales] Post-Onboarding Reflection Survey | |

| | Survey Invite to Customer | ✏ ⋮ |

| | Survey | ✏ ⋮ |
| | Survey Name: [B2B Sales] Onboarding Follow-Up Survey | |

6. Add an If/Else Logic block that will send a Slack message to the Onboarding Team if the customer indicates they are not satisfied with their onboarding experience. The purpose of this message is to let the Onboarding Team know that they need to follow-up with the customer.
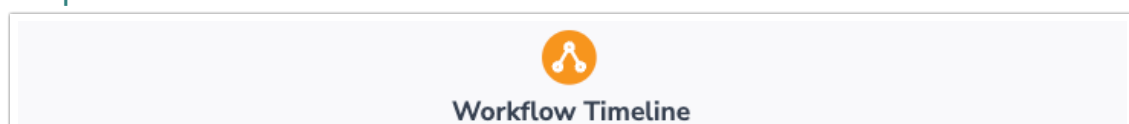
If/Else Logic ✏ ⋮

If: View Conditions ▲

  #2 Survey: Question "Were you satisfied with your onboarding experience?" is one of the following answers ("Very Dissatisfied","Dissatisfied")

  12 Slack Message to Onboarding Team - "Follow Up Needed!"   ✏ ⋮ ❗

  13 ⊙ Complete   ⋮ ✅

> For more details on using If/Else Logic in Alchemer Workflow, refer to this documentation.

7. Outside of the If/Else Logic block add another Slack step. This step will send a Slack message to the Onboarding Team and includes the onboarding feedback provided by the customer.

Example Workflow

Workflow Timeline

Initiate Workflow

Salesforce

Action: Record updated

Survey Invite to Account Executive

Survey

Survey Name: [B2B Sales] Onboarding Context Survey

Salesforce Push: Survey responses added to customer record

Send Email to Onboarding Team: Onboarding Context Survey Answers

Send Email to Customer: Welcome and Session Scheduling

Two Week Delay

Survey Invite to Onboarding Team

Survey

Survey Name: [B2B Sales] Post-Onboarding Reflection Survey

Survey Invite to Customer

Survey

Survey Name: [B2B Sales] Onboarding Follow-Up Survey

If/Else Logic

If: View Conditions ▲

#2 Survey: Question "Were you satisfied with your onboarding experience?" is one of the following answers ("Very Dissatisfied","Dissatisfied")

12 Slack Message to Onboarding Team - "Follow l

13 ⬛ Complete

Slack Message to Onboarding Team: "New Onboarding Feedback!"

⬇

✓
Complete