

# Customer Onboarding: After the Sale

Maximize Your Customers' Success, Satisfaction,  
and Retention with an Exceptional Post-Purchase  
Experience



**Course Book**

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# Introduction

"How you think about your customers influences how you respond to them."

- *Marilyn Suttle, coach and author*

**A**ccording to one of the leading customer experience consultants Colin Shaw, it costs a company 6-7 times more to acquire a new customer than to retain an existing one.

Colin Shaw also mentions that, according to Marketing Metrics, the probability of selling a product or service to an existing client is in the neighborhood of 60-70 percent, while the probability of selling to a new client is only 5-20 percent.

Whichever studies or statistics you choose to look at, it's clear that it's much easier to sell to existing customers than it is to find new ones. By focusing more on customer retention, you can mitigate future expense. Customer retention allows you to get repeat sales for a fraction of the marketing budget needed to gain a new customer.

## **Learning Objectives:**

By the time you have completed this course, you'll be able to:

- Explain the value and necessity of having a structured customer onboarding process to aid in customer retention and future sales
- Follow a step-by-step process for developing a customer onboarding program

- Create a system for the first few weeks after purchase to ensure customer satisfaction and successful use of your product or service
- Draft the content customers will receive after their purchase and how it will be delivered
- Outline the next steps in the months following a purchase that you can automate to keep engaged with your customer for future sales
- Identify the common mistakes in the first stages of the client onboarding process and how you will avoid them.
- Consolidate and implement your learning and plan future action steps so you can achieve the goals you set for this course.

This course is broken down into 6 modules, an introduction and conclusion, to take you step-by-step through Customer Onboarding: After the Sale.

The modules follow a logical order, so while you can skip around if you want, it's best to work through them one at a time.

As you go through each module, use your Action Guide to help you complete the Action Steps at the end of each.

## **Expectations**

Before we start the course, take a minute to think about what you want to get out of it.

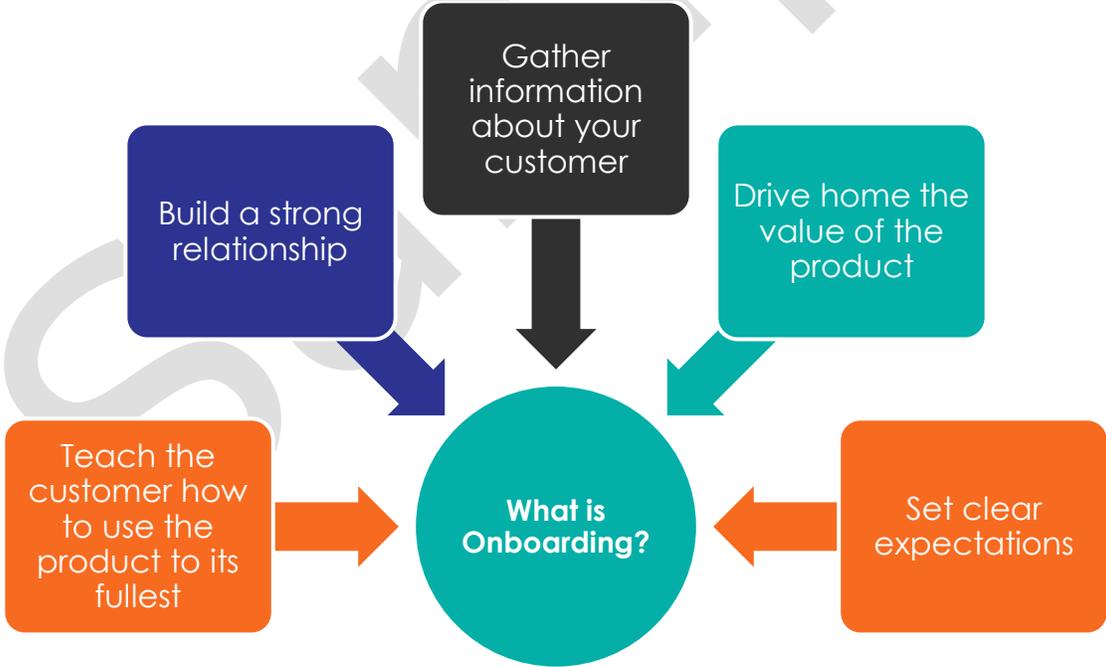
In the Action Guide, write down three skills you expect to gain.

Now that you're clear about what you want this course to deliver, we can get started.

# Module 1 - The Importance of Customer Onboarding in Your Sales Cycle

## What Is Customer Onboarding?

While onboarding has traditionally meant the process of orienting new employees, it is also an important key to the customer experience and a vital part of customer retention. It's what you do immediately after someone purchases your product or service, including:



- Teaching the customer how to use your product to its fullest and enjoy its intended benefits. In effect, you are getting the customer up to speed on your product or service.
- Building a strong relationship with your customer so that the experience lasts well into the future. Your customers will become loyal brand advocates as well as repeat buyers.
- Gathering information about your customers so that you can provide even better products and services for them.
- Driving home the value of your product so that it's easy for your customers to understand how it helps them or solves their problems.
- Setting clear expectations for your customer regarding your products and services.

Onboarding is an integrated approach that creates a consistent customer experience, which is very important in overall customer satisfaction. Ideally, a customer feels that the product or service is custom-tailored to meet their needs. At the same time, Customer A and Customer B should have a similar experience with your deliverables and service care. A good process in place ensures this and gives you better control over the experience of your customers.

## Why You Need Onboarding

What if you don't have an onboarding process in place? Without proper onboarding, you may face:



- Unsatisfied clients who find that the product or service doesn't deliver as expected
- Poor online reviews of your product or service
- A lack of referrals, which are the best marketing any business could hope for
- Low sales for service renewals or other products
- Confused and frustrated staff, who don't know how to deal with customer issues after the sale
- Lack of metrics to measure product value and quality
- Lack of feedback to help you with future product development

**ATTENTION:**

This is only an excerpt from our full course **Customer Onboarding: After the Sale**. The full, customizable course contains 6 major modules and Action Steps.

When you purchase a license for the course, you'll receive the editable files for the Course Book, Action Guide, graphics, social posts, and other resources.

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