



SYSTEMS SUNDAY

Downloadable

Creating Your Onboarding Process Week 2 Action Steps

Brought to you by

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#1: Take one product or service you have and create your picture of your customer's post-purchase experience

How will your customers use your product or service?

	Uses
1	
2	
3	
4	
5	
6	

What key benefits does the customer receive with this product or service?

	Benefits
1	
2	
3	
4	
5	
6	

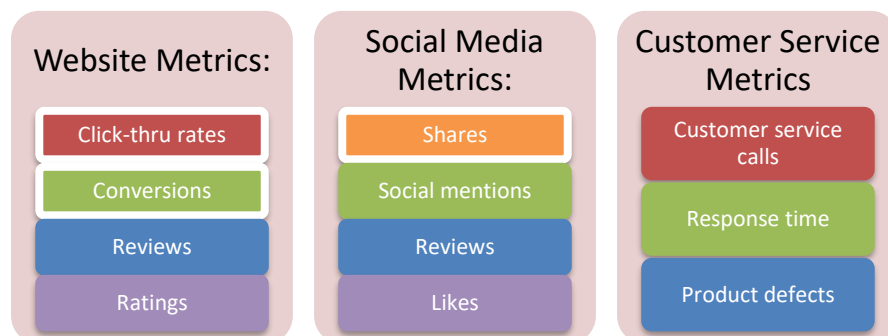
What details are involved in the post-purchase experience? As you list the details, take notes on the How, What, and When for each item.

	How	What	When
Deliverables			
Installation			
Use			
Features			
Changes in Use			
Maintenance			
Problems			
Benefits			

Use a separate piece of paper or spreadsheet to create a visual representation of your customer’s post-purchase interactions with you and your business, along with what they do in between any **points of contact**. Be sure to label the timeframe between points of contact.

#2: Create a list of the systems, processes, and tasks that you will set up to implement your customer's post-purchase experience, including

- **Your CRM** – What system will you use to track customer details and communicate with customers? For your system, each step should trigger the next step. For example, when the customer pays for the product, this triggers the payment confirmation email, the new product "welcome," and access to additional content of a "how to" nature. Included in this system should be a way to track and implement these steps. This can be done with automated software programs like shopping carts, email autoresponders, or advanced CRM platforms.
- **Service & operations training/implementation** – What type of training will you need to set up and in what time frame? Ensure that your team members have all of the same materials and tools for following up so that your messaging and service are consistent. A good way to do this is to provide a checklist for them to follow after a customer purchases the product. They can check off each item as it's completed. The same customer onboarding system needs to be used for all customers. You need to ensure that it's being used across the board and by all team members. Therefore, it's essential to have a system in place to ensure that the same process is being used for each sale.
- **Communication with team members** – Who needs to be part of the project team? How will you communicate with your team?
- **Product & performance tracking** (product usage, sales, service, etc.) – Identify 5 metrics you will use to measure the success your customer has with your product. For example, If you sell through your website, there should be tracking that measures things such as click-thru rates, conversions, reviews, and ratings. Metrics are also available through social media, such as shares, social mentions, reviews, and likes. Make sure to monitor whatever statistics are available.



- List **potential repeat sales or other products/services** that are relevant to what your customer just purchased. A repeat sale is when a person purchases the product or service again, or buys a new product that might be used with the one they previously purchased. For example, if a customer buys an online training program that teaches them about running their own business, and they get a call to see if the program is helping them reach their business goals, the customer is more likely to join their coaching program.

One purpose of onboarding is for the business to gather information about customer product use. The purpose of this is to provide the support the customer needs, but also to plan future products and increase sales. You can begin thinking of ideas for repeat sales using previous customer data. Offer products, upgrades, and revisions based on your previous customers' preferences. You can then get better ideas once you put your onboarding strategy in place and start gaining new data.

- New or supplementary products might include:
 - Renewals or repeat purchases of products already purchased
 - Similar items or items that can be used with the product already purchased ("If you like this, you may like this too...")
 - Discounts on similar products and services
 - Free upgrades or extras

Once you've listed all the details of the picture of your customer's post-purchase experience, you can start to refine it. Eliminate items that just cause confusion and review your list to see where you might have missed something. This is an essential step that must be completed before you can begin creating content and working out other fine details of your customer's onboarding process.

CRM Systems	1	
	2	
	3	
	4	

Service & Ops Training & Implementation	1	
	2	
	3	
	4	

Team Members/ Communication Methods	1	
	2	
	3	
	4	

Performance Tracking Metrics	1	
	2	
	3	
	4	
	5	

Potential Repeat Sales & Other Products/ Services	1	
	2	
	3	
	4	
	5	