



SYSTEMS SUNDAY

Downloadable

Creating Your Onboarding Process Week 3 Action Steps

Brought to you by

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#1: Take the one product or service you identified in Weeks 1 & 2 and list the following

- What do your clients and/or customers need to know to use the product or service? For example, what process should they follow, step-by-step?
- What details do your clients and / or customers need to know about the product? For example, the product is not waterproof or should be kept in a dry place, safety precautions, location of additional resources, how to get support, etc.
- What 'quick wins' can they get in the first 30 days and what do they need to know or have in order to achieve those wins?

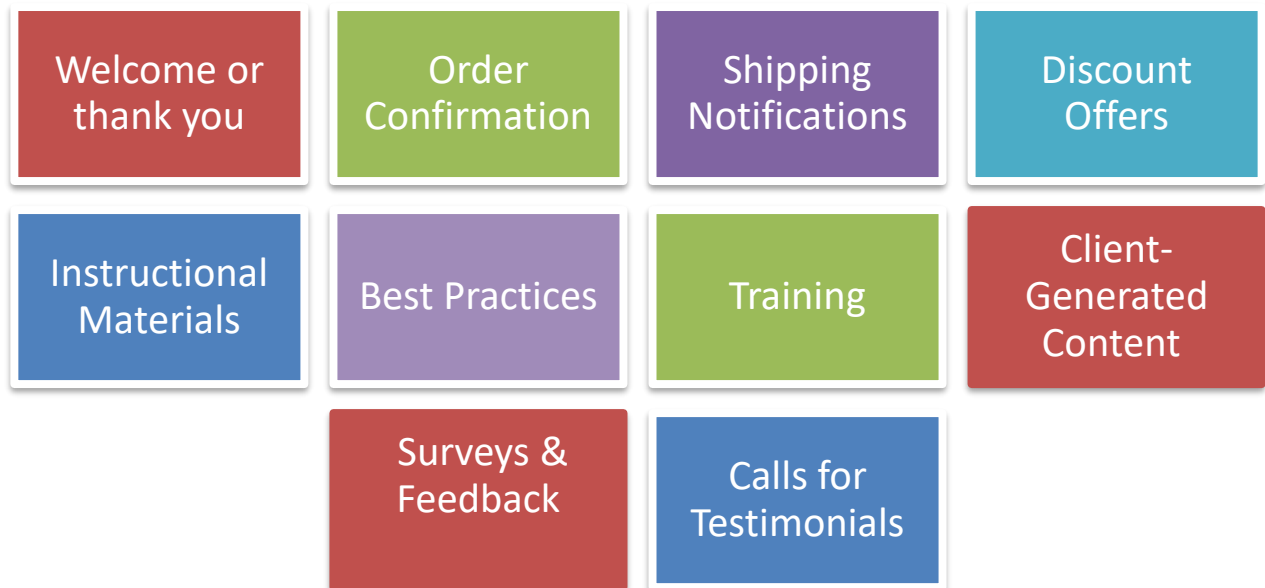
#2: Identify 3 modes of delivery to educate and inform your customer/client about this new product or service and list what type of information you will put into each so that your customer can start successfully using the product or service

For example, if you are making a video, you might include a demo of using a software tool you're providing.

- 1.
- 2.
- 3.

#3: List which items you will automate, including reminders for doing any tasks that should NOT be automated

#4: Ideas of specific pieces of content to use for your onboarding process



- **Welcome or Thank You.** Always have a welcome message that thanks the customer and tells them you're glad they're on board. It should include basic product information, links to further information, and clear instructions for contacting you. You can also include functions, steps, a reminder of the product's value or benefits, Q&A, and an overview of the support you will offer from here on out.
- **Order Confirmation.** An order confirmation should always be sent out immediately at the time of purchase. People who are used to buying products online from Amazon or other retailers look for this confirmation email right after the purchase. In addition to providing information, it also gives the customer peace of mind.
- **Shipping Notifications.** Send out a shipping notification as soon as the product ships with an estimate of arrival time and any other information the customer should know. If you have a tracking system, explain to the customer how to use it.

- **Discount Offers.** In follow-up communications, you can offer the customer discounts on renewals or similar products. This serves several purposes:
 - One is to offer the customer other products they can use and to make it easy for them to purchase.
 - For the customer, they are receiving an exclusive deal, which helps to build a relationship between you and them.
 - Making targeted offers also helps you understand better your customers' tastes and interests.
- **Instructional Materials.** Offer an array of materials teaching your customer how to best use your product. These can be in various formats including video tutorials, print materials, podcasts, webinars, FAQ pages, and so on. It's good to offer this material rather than wait for the customer to ask. You can send a message saying something like, "Did you know you can do this too?" A customer may not know that they're missing any part of the value of a product or service.

Also, if you offer a 1:1 coaching call or monthly Q&A calls, you can explain how it works, where to get information, how to schedule calls, etc. within these materials.

- **Best Practices.** "Best practices" content is a type of instructional material that gives general guidelines or common trends among other users. It may also identify common mistakes customers make with the product or common problems and how to overcome them.
- **Training.** You might offer your customers in-person training, especially if the product is complex or of a highly technical nature. If you sell a service, you might offer training on things related to the service. For example, if you build websites, you could offer training sessions on SEO.
- **Client-Generated Content.** You can optionally offer content generated by other clients or previous customers of a testimonial nature. For example, you might send your customers an email with photos of previous customers and their stories with your product.

- **Surveys and Feedback.** One type of content you can share is surveys and other content to get feedback. This feedback helps you understand your customer's feelings about your product and any trouble they might be having.
- **Calls for Testimonials.** You can also ask your customers if they'd like to leave you a testimonial or review. Satisfied customers are often willing to do this and you can offer a discount or other freebie as incentive as well.

The content you offer should be ongoing. Don't send out a list of resources and then no other informational content. In addition to offering more help with using your product, you also keep in touch with the customer, which is helpful for repeat sales and the onboarding process beyond these 30 days.