



# How Effective Customer Onboarding Sets the Stage for Human Connection and Experience Improvement

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New customer onboarding is one of the most persistent business challenges that many brands and organisations the world over contend with. You're no doubt aware that, regardless of vertical or industry, it's more expensive to onboard new customers than retain existing business. What's more, organisations must constantly consider customer onboarding with a variety of obstacles and challenges in mind (inflation and the supply chain crisis being two of the most pertinent at the moment).

A lot of brands and companies use their customer experience (CX) programmes to assist with onboarding as a matter of course, but many of those initiatives fail to move the needle, much less simplify acquiring and keeping new business. Today's conversation covers why that's the case, as well as how you can use your CX programmes to not only onboard customers in a more effective manner, but to also achieve Experience Improvement (XI) all the while.

## DESIGNING WITH THE END IN MIND

One of the main reasons so many CX programmes fail is that brands use them to simply accrue a mountain of data, then attempt to infer conclusions and helpful insights afterward. This has more or less been many organisations' reference point for successful CX programmes for many years, but big data alone is insufficient for actually solving business challenges. This fact is no less true for customer onboarding, and these brands' failure to recognise it is why their CX initiatives oftentimes fail to meaningfully enhance customer onboarding.

Rather, organisations mustn't rush to turn their listening posts on. They must instead design their CX programmes with their end goal(s) in mind. Orienting your CX programme around quantifiable business outcomes is so much more effective than attempting to ferret goals out of an



indiscriminate mountain of data. What this means for you and your brand is that you need to ask the right questions about your customer onboarding experience *before* programme activation, not *after*.

## ASKING THE RIGHT QUESTIONS

I've consulted with clients on this very topic for many years now, and from what I've gathered, there are several questions that every brand and organisation, regardless of vertical or industry, needs to consider when evaluating their customer onboarding experience. First, to your knowledge, what specific barriers to success are customers encountering during their onboarding? As far as you know, are these problems technical, or are they more procedural?

Another question to consider here is whether certain types of customers find your journey touchpoints and interactions more or less challenging. This question is essential for identifying cohorts within your audience and thus the problems that they might be experiencing during onboarding. This reflects the reality that onboarding is not a one-size-fits-all process; organisations can and must execute different onboarding strategies for different types of customers.

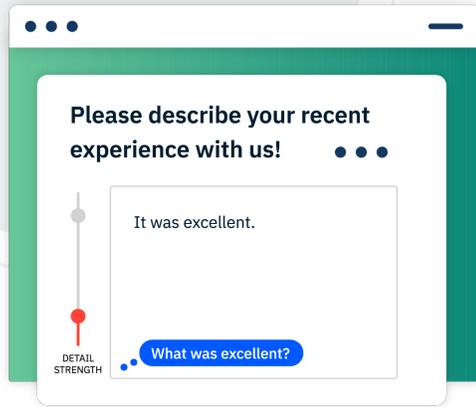
Relatedly, brands should remember to pressure test beyond the average for customer onboarding. Averages have

their uses, but finding the problems that customers might be facing while you're onboarding them requires pushing things just a bit further. As such, pressure testing beyond the average is a good way to drill down and get an exact picture of how different cohorts perceive touchpoints within the onboarding journey.

## LEVEL-SETTING EXPECTATIONS

You can get into more detailed aspects of your customer onboarding experience once you've established a foundation with the questions above. An important area to start here is with your contact centre—you probably already guessed that a key question here is whether certain customers feel the level of support your teams provide is inadequate and why. You can then ascertain whether it's clear to customers that help is available, whether assistance is delivered in a timely fashion, and if associates are empowered to help.

The point of asking questions like this about your contact centre or any other aspect of your onboarding experience is to ensure that expectations are properly being set, managed, and *improved*. It's imperative to remember that while the onboarding experience is but one component in a much wider ecosystem of customer interactions with your organisation, it's a crucial first step that sets the tone for the rest of your relationship.



## FROM CUSTOMER ONBOARDING TO EXPERIENCE IMPROVEMENT

A lot of brands fail to create or meaningfully improve a quality customer onboarding experience because they either stop at gathering data, react to problems only as they arise, or some combination of the two. With an Experience Improvement (XI) approach, your brand can identify what questions are best to pose to your customers at which moments in their onboarding journey. This approach demands more patience than simply turning listening posts on, but the rewards will become shorter and shorter-term the longer you continuously implement this design process.

Additionally, though one of the main points of a better onboarding process is a happier customer, this approach's rewards offer a lot more than that singular outcome. Being patient with your onboarding results in a bold, human, and invested relationship your competitors will not be able to easily break. It'll set the tone for increased transactions and decreased contact centre outreach. Finally, you'll have gained the insights necessary for creating Experience Improvement across your entire experience, not 'just' onboarding.

### DEPLOYING SURVEYS

Knowing which questions to ask what customer segments about their onboarding experience is only half the battle. Once your team has established those questions, the next part of the discussion must revolve around the tools you use to actually pose them to your customers: surveys.

Surveys are yet another arena where designing with the end in mind counts for everything. Just as you take time before activating listening posts to define your audience and onboarding touchpoints, so too must you identify where along that journey customers would be most likely to receive and return a survey. Being patient enough to identify the key moments at which to deploy surveys will greatly increase the odds you'll be able to identify specific customer needs or issues.

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