

YOURCXC |

**FIX THE FIRST 7 DAYS.
OR LOSE THEM FOREVER.**

THIS TOOLKIT SHOWS YOU HOW TO ONBOARD FOR RETENTION, NOT REGRET.

WHAT'S INSIDE THE TOOLKIT?

Customer Onboarding Journey Map Template

Map each stage of the onboarding process to identify friction points and moments of delight.

Onboarding Experience Planner

Create a step-by-step, cross-functional onboarding plan that ensures early value delivery.

Retention Strategy Framework

Design a proactive approach to customer retention, including segmentation, triggers, and interventions.

Onboarding Email & Messaging Templates

Pre-written scripts and email sequences that guide customers through their first 30-90 days.

Customer Health Score & Retention Risk Tracker

Monitor customer engagement, satisfaction, and renewal risk with clear metrics.

Welcome Survey & Feedback Template

Collect meaningful feedback early to improve onboarding and demonstrate responsiveness.

WHO IS THIS FOR?

- SaaS companies and service-based businesses seeking stronger onboarding outcomes
- CX, marketing, and customer success leaders focused on retention
- Founders and ops teams wanting to reduce churn and increase lifetime value
- Consultants building onboarding and retention programs for clients

WHAT YOU'LL BE ABLE TO DO

- Design a seamless onboarding journey tailored to your customer segments
- Improve time-to-value and reduce early churn
- Communicate proactively with welcome messaging and automated touchpoints
- Track customer health and identify retention risks early
- Build long-term customer relationships that drive growth

CUSTOMER ONBOARDING JOURNEY MAP TEMPLATE

1. DEFINE YOUR CUSTOMER SEGMENT

WHO IS THIS ONBOARDING JOURNEY DESIGNED FOR?

- Segment:
- Industry/Persona:
- Key goals or expectations:

2. ONBOARDING JOURNEY STAGES

MAP OUT EACH STAGE OF YOUR ONBOARDING EXPERIENCE:

- Stage 1: Sign-Up / Purchase
- What does the customer do?
 - What should we do to support them?
 - What systems or tools are used?
 - What's the success metric?

- Stage 2: Welcome & First Contact
- Welcome email or call?
 - Introduce account rep, success team, or onboarding flow?
 - Resources or expectations shared?

- Stage 3: Account Setup / Access
- What setup tasks does the customer complete?
 - Is setup guided, self-serve, or assisted?
 - Where do customers typically get stuck?

- Stage 4: First Value / Quick Win
- What action signifies the customer has reached first value?
 - What triggers that action?
 - How do we celebrate or reinforce success?

CUSTOMER ONBOARDING JOURNEY MAP TEMPLATE

2. ONBOARDING JOURNEY STAGES

- Stage 5: Education & Adoption
- Are there learning modules, tooltips, or help guides?
 - Do we provide coaching, Q&A, or support webinars?

- Stage 6: Engagement & Handover
- Are customers handed off to account management or support?
 - What feedback is collected?
 - What does a "healthy onboarding" customer look like?

3. TOUCHPOINTS & CHANNELS

- List the customer and internal touchpoints at each stage:
- Email sequences
 - In-app or platform experiences
 - Calls, meetings, demos
 - Surveys or check-ins

4. CUSTOMER EMOTIONS & EXPERIENCE GOALS

- For each stage, capture the ideal customer emotion and experience goal:
- Sign-Up: Excited, reassured
 - First Contact: Welcomed, confident
 - Setup: Supported, capable
 - First Value: Successful, motivated
 - Adoption: Informed, engaged
 - Handover: Secure, satisfied

CUSTOMER ONBOARDING JOURNEY MAP TEMPLATE

5. METRICS & MILESTONES

Track key metrics to measure onboarding success:
Time to First Value (TTFV)
Onboarding Completion Rate
Activation Rate
CSAT / NPS during onboarding
Retention at Day 30 / Day 90

6. OPPORTUNITIES & NEXT STEPS

Identify improvement opportunities across the journey:

- Which stages need more clarity or automation?
- Where are customers dropping off?
- What can be simplified or improved for a smoother experience?

ONBOARDING EXPERIENCE PLANNER

1. ONBOARDING OBJECTIVES

WHAT DOES SUCCESS LOOK LIKE AT THE END OF ONBOARDING?

- Define goals (e.g., product setup, engagement, first value)
- Align objectives with business outcomes (e.g., retention, expansion)

2. CUSTOMER SEGMENTATION & PERSONALISATION

- Who are we onboarding? (Segment, industry, size, use case)
- Will onboarding be self-serve, high-touch, or hybrid?
- What needs to be tailored based on segment or persona?

3. KEY PHASES & MILESTONES

BREAK DOWN THE ONBOARDING JOURNEY INTO CORE PHASES:

Phase 1: Welcome & Kickoff

- Welcome email/call
- Introduce key contacts
- Share success roadmap

Phase 2: Setup & Configuration

- Platform access and setup
- Technical integrations (if applicable)
- Setup checklist completed

Phase 3: Training & Enablement

- Product walkthrough or onboarding webinar
- Tutorials, guides, or tooltips
- Adoption of 1-2 core features

Phase 4: First Value Delivery

- Define the "aha" moment
- Ensure customer sees first outcome or benefit

Phase 5: Feedback & Handoff

- CSAT or onboarding survey
- Internal review of onboarding success
- Handoff to account manager or support team

ONBOARDING EXPERIENCE PLANNER

4. ROLES & RESPONSIBILITIES

CLARIFY WHO OWNS EACH STAGE OF ONBOARDING:

- Customer Success Manager:
- Sales (handoff):
- Support/Implementation:
- Marketing/Enablement:
- Customer (checklist, tasks):

5. ONBOARDING CHECKLIST TEMPLATE

CREATE A CHECKLIST TO TRACK ONBOARDING PROGRESS:

Account Created

Welcome Email Sent

First Call Completed

Setup Complete

First Value Achieved

Survey Sent

Handoff Complete

ONBOARDING EXPERIENCE PLANNER

6. COMMUNICATION PLAN

PLAN HOW AND WHEN YOU'LL COMMUNICATE WITH CUSTOMERS:

- Email, phone, video, in-app?
- Frequency (daily, weekly)?
- Who sends what and when?
- Automations vs. manual touchpoints?

7. SUCCESS CRITERIA & METRICS

DEFINE HOW YOU'LL MEASURE ONBOARDING SUCCESS:

- Time to First Value (TTFV)
- Onboarding Completion Rate
- Feature adoption milestones
- CSAT/NPS post-onboarding
- Retention at 30/60/90 days

RETENTION STRATEGY FRAMEWORK

1. DEFINE RETENTION GOALS

WHAT DOES SUCCESSFUL RETENTION LOOK LIKE FOR YOUR BUSINESS?

- Reduce churn by X% within 6–12 months
- Increase average customer lifetime value
- Improve Day 30, 60, and 90 retention benchmarks

2. SEGMENT YOUR CUSTOMERS

SEGMENT CUSTOMERS BASED ON:

- Industry, product usage, revenue, engagement level
- At-risk, healthy, loyal

TAILOR RETENTION STRATEGIES TO EACH SEGMENT'S NEEDS AND BEHAVIOURS

3. IDENTIFY RETENTION TRIGGERS & RISK FACTORS

WHAT SIGNALS INDICATE A CUSTOMER MAY CHURN?

- Decline in logins or usage
Unused features or stalled onboarding
- Low satisfaction scores (CSAT, NPS)
- Missed payments or frequent support issues

SET ALERTS FOR EARLY INTERVENTION

4. CREATE RETENTION INTERVENTIONS & PLAYBOOKS

DEVELOP PROACTIVE AND REACTIVE STRATEGIES:

- Re-engagement campaigns
- Personal check-ins from Customer Success or Support
- Product training or additional support
- Win-back offers or loyalty rewards

RETENTION STRATEGY FRAMEWORK

5. COMMUNICATION & ENGAGEMENT PLAN

OUTLINE HOW AND WHEN YOU WILL COMMUNICATE TO REINFORCE VALUE:

- Monthly tips or usage insights
- Educational content
- Invitations to webinars, check-ins, or surveys
- Triggered messaging based on behaviour

6. LOYALTY & ADVOCACY PROGRAMS

HOW WILL YOU RECOGNISE AND REWARD LONG-TERM OR HIGH-VALUE CUSTOMERS?

- Referral programs
- Insider groups, early access, or special offers
- Testimonials, case studies, or spotlight recognition

7. METRICS & SUCCESS INDICATORS

TRACK YOUR STRATEGY USING:

- Customer Retention Rate
- Customer Lifetime Value (CLV)
- Churn Rate (Voluntary vs. Involuntary)
- Repeat purchase rate (for eCommerce)
- Net Promoter Score (NPS)
- Expansion or upsell revenue

8. REVIEW & OPTIMISE

- Review retention performance monthly/quarterly
- Gather feedback from customers who churn
- Refine playbooks and communication
- Ensure alignment across teams (Product, Marketing, Support, CX)

ONBOARDING EMAIL & MESSAGING TEMPLATES

1. WELCOME EMAIL (DAY 0)

Subject: 🎉 Welcome to [Your Company] – Let's Get Started!

Hi [First Name],

Welcome aboard! We're thrilled to have you with us. Your account is now active, and you're just a few steps away from making the most of [Product/Service Name].

👉 [Login Button or CTA to First Step]

If you have any questions, we're here to help!

Cheers,
The [Your Company] Team

2. INTRODUCTION TO YOUR ONBOARDING SPECIALIST (DAY 1)

Subject: Meet Your Onboarding Specialist

Hi [First Name],

I'm [Rep Name], your onboarding specialist here at [Company]. I'm here to ensure you have a smooth and successful start. I'd love to schedule a quick 15-min call to walk you through the first steps.

👉 [Book a Time Button]

Looking forward to working with you!

[Rep Name], Customer Success Team

ONBOARDING EMAIL & MESSAGING TEMPLATES

3. PRODUCT SETUP REMINDER (DAY 3-5)

Subject: Need Help Setting Things Up?

Hi [First Name],

Just checking in – we noticed your account setup isn't fully complete yet. If you need help, we've got resources and people ready to assist you.

👉 [Link to Setup Guide or Book a Setup Call]

Let's make sure you're getting the most out of your experience.

– The [Company] Team

4. FIRST VALUE CONFIRMATION (DAY 7-14)

Subject: 🎯 You're on the Right Track!

Hi [First Name],

You've already [insert milestone – e.g., completed your first campaign, uploaded your first project, etc.] – amazing work!

Next, we recommend [suggest next step].

👉 [Take Action CTA]

We're here to support you every step of the way.

– [Customer Success Rep]

ONBOARDING EMAIL & MESSAGING TEMPLATES

5. ONBOARDING COMPLETION & FEEDBACK REQUEST (DAY 30)

Subject: How Did We Do?

Hi [First Name],

You've completed your onboarding journey – well done! We'd love your feedback so we can keep improving the experience for future customers.

👉 [Feedback Survey Button]

Thanks for being part of the journey. Here's to your continued success!

– The [Company] Team

6. RE-ENGAGEMENT FOR STALLED ACCOUNTS

Subject: Need Help Getting Back on Track?

Hi [First Name],

We noticed you haven't been active lately, and we're here to help. Whether it's setup, strategy, or support, let us know how we can assist.

👉 [Link to Help Center or Book a Call]

Let's get you moving forward again!

– [Rep Name], Onboarding Team

CUSTOMER HEALTH SCORE & RETENTION RISK TRACKER

CUSTOMER NAME					
ACCOUNT ID					
SEGMENT					
ONBOARDING STATUS					
LAST LOGIN DATE					
PRODUCT USAGE SCORE (1-5)					
SUPPORT TICKETS (LAST 30 DAYS)					
SATISFACTION SCORE (CSAT/NPS)					
HEALTH SCORE (1-100)					
RISK LEVEL (LOW/MEDIUM/HIGH)					
RETENTION RISK NOTES					
ASSIGNED CSM					
NEXT FOLLOW-UP DATE					

WELCOME SURVEY & FEEDBACK TEMPLATE

1. WHEN TO SEND THIS SURVEY

- 7-14 days after the customer begins onboarding
- After key milestones such as product setup or first training session
- Automatically triggered by onboarding completion

2. RECOMMENDED FORMAT

- Short and focused (5-7 questions)
- Mix of multiple choice, scaled (1-5), and open-ended questions
- Mobile-friendly and easy to complete in under 3 minutes

3. SAMPLE SURVEY QUESTIONS

1. HOW WOULD YOU RATE YOUR ONBOARDING EXPERIENCE SO FAR? (1-5 SCALE)

1 - Very Poor

2 - Poor

3 - Neutral

4 - Good

5 - Excellent

WELCOME SURVEY & FEEDBACK TEMPLATE

3. SAMPLE SURVEY QUESTIONS

2. HOW EASY WAS IT TO GET STARTED WITH OUR PRODUCT/SERVICE?

Very Difficult

Somewhat Difficult

Neutral

Somewhat Easy

Very Easy

3. DID YOU RECEIVE THE SUPPORT AND GUIDANCE YOU NEEDED?

Yes

No

4. WHAT WAS THE MOST HELPFUL PART OF YOUR ONBOARDING EXPERIENCE?

[Open Text Field]

WELCOME SURVEY & FEEDBACK TEMPLATE

3. SAMPLE SURVEY QUESTIONS

5. IS THERE ANYTHING THAT CONFUSED OR FRUSTRATED YOU DURING ONBOARDING?

[Open Text Field]

6. BASED ON YOUR EXPERIENCE SO FAR, HOW LIKELY ARE YOU TO RECOMMEND US TO A FRIEND OR COLLEAGUE?

1	2	3	4	5	6	7	8	9	10
Not Very Likely									Very Likely

7. ANY OTHER SUGGESTIONS OR FEEDBACK YOU'D LIKE TO SHARE?

[Open Text Field]

4. FOLLOW-UP & ANALYSIS PLAN

- Assign someone to review results weekly or monthly
- Track key themes and improvement opportunities
- Respond directly to customers if necessary to thank them or resolve issues
- Feed insights back into onboarding playbook updates

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GROW THE REVENUE.**

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