

YOUR EXC

TURN ONBOARDING FRICTION.
INTO LIFETIME REVENUE.

IN SAAS, CHURN DOESN'T START AT RENEWAL — IT STARTS IN ONBOARDING.
WHEN USERS STALL, GUESS, OR DISENGAGE IN THE FIRST WEEK, YOU'VE ALREADY LOST THEM.

THIS TOOLKIT GIVES YOU A FRAMEWORK TO TIGHTEN ONBOARDING, BOOST ADOPTION, AND DRIVE RETENTION BEFORE RENEWAL IS EVEN A CONVERSATION.

WHAT'S INSIDE THE TOOLKIT?

The 5 biggest onboarding leaks that create early churn

A 7-Day Fix Map to improve activation and product engagement

Email and in-app message templates for the first-week experience

A 90-Day ROI Snapshot showing how onboarding impacts renewals

WHO IS THIS FOR?

SaaS founders, Customer Success leaders, and Product teams who want to:

- Reduce churn by fixing onboarding bottlenecks.
- Drive activation, adoption, and product-led growth.
- Build user journeys that feel seamless and self-selling.

If you're tired of chasing renewals that should have been guaranteed by Week 1, this toolkit is your Fix-It blueprint.

CX LEAK FINDER — WHERE USERS DROP OFF

MOST SAAS CHURN IS BORN IN THE FIRST 7 DAYS.
HERE ARE THE FIVE MOST COMMON **CX LEAKS** — AND HOW TO FIX THEM.

LEAK 1

No clear first-win moment

Users sign up but don't experience value quickly enough.

Fix: Identify and highlight one "aha moment" users can achieve in < 10 minutes.

LEAK 2

Overwhelming onboarding flow

Too many steps, tutorials, or choices kill motivation.

Fix: Simplify onboarding to one guided path focused on activation, not education.

LEAK 3

Lack of proactive guidance

Users go dark when they hit friction.

Fix: Add automated in-app nudges or success-team check-ins during the first week.

LEAK 4

No human touch in onboarding

Automation is great, but connection converts.

Fix: Send a short personalised "welcome + help offer" message from the success manager.

LEAK 5

No success metric shared

If users don't know how success is measured, they don't see progress.

Fix: Define success in onboarding: "You'll know it's working when..."

THE 7-DAY FIX MAP

YOUR FIRST 7 DAYS DECIDE YOUR RENEWAL RATE.
USE THIS MAP TO BUILD A STRUCTURED, VALUE-DRIVEN ONBOARDING JOURNEY.

| Day | Focus Area | Action Step | Owner |
|-----|-----------------------|---|-----------------------|
| 1 | Welcome & setup | Send humanised welcome + quick-start guide | Customer Success Lead |
| 2 | First-win milestone | Trigger in-app message when user completes first action | Product Ops |
| 3 | Guided support | Send short "Need help?" nudge email | CS Automation |
| 4 | Adoption monitoring | Track engagement metrics (logins, features used) | Analytics Lead |
| 5 | Friction intervention | Reach out to inactive accounts manually | CS Rep |
| 6 | Progress recap | Email user highlighting key value achieved so far | Success Manager |
| 7 | Feedback & next step | Ask for 1-minute feedback + introduce advanced feature | CS Manager |

QUICK-WIN MESSAGE TEMPLATES

WELCOME EMAIL (IMMEDIATELY AFTER SIGN-UP)

“Hi [Name], welcome to [Product]!
You’re 3 steps away from your first win:
Log in → Complete your setup → Try [this core feature].
Need help? Your Success Manager [Rep Name] is on standby.”

IN-APP NUDGE (DAY 2)

“Nice work getting started, [Name]!
Ready to see value fast? Try [this action] – most users see results in minutes.”

RE-ENGAGEMENT EMAIL (DAY 5 FOR INACTIVE USERS)

“Hey [Name], noticed you haven’t finished setup yet.
Let’s get you to your first win – it only takes 5 minutes.
Here’s your login link 🏠 [Link]”

PROGRESS RECAP (DAY 6)

“Here’s what you’ve achieved so far, [Name]:
• [Metric 1] • [Metric 2] • [Benefit].
You’re on track for [X goal] – keep going!”

FEEDBACK MESSAGE (DAY 7)

“We’d love a quick thought – how was your first week with [Product]?
Reply with 1 word or phrase.
It helps us make onboarding smoother for you.”

ROI SNAPSHOT — THE COST OF ONBOARDING LEAKS

| Leak Area | Average Monthly Loss | Fix-It ROI (90 Days) |
|--|-----------------------------|-----------------------|
| No clear first win | AED 18 000 | +AED 10 000 recovered |
| Overwhelming flow | AED 15 000 | +AED 9 000 recovered |
| Lack of guidance | AED 12 000 | +AED 7 000 recovered |
| Low engagement contact | AED 10 000 | +AED 6 000 recovered |
| Total Recovery Potential (3 months) | AED 32 000 – 40 000+ | |

YOUR NEXT STEP

FIX THE EXPERIENCE. GROW THE REVENUE.

Early activation is retention insurance — every “aha moment” secured multiplies lifetime value.

Onboarding isn't a phase — it's the foundation of retention.

👉 Book your Finance Fix-It Call:

<https://calendly.com/gareth-cummings-yourcxc/30min>

In 30 minutes, we'll:

- Map your first 7 days of user experience.
- Identify friction points and activation gaps.
- Build a 3-step Fix-It plan to lift retention and renewals.

YOURCXC |

**FIX THE EXPERIENCE.
GROW THE REVENUE.**

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