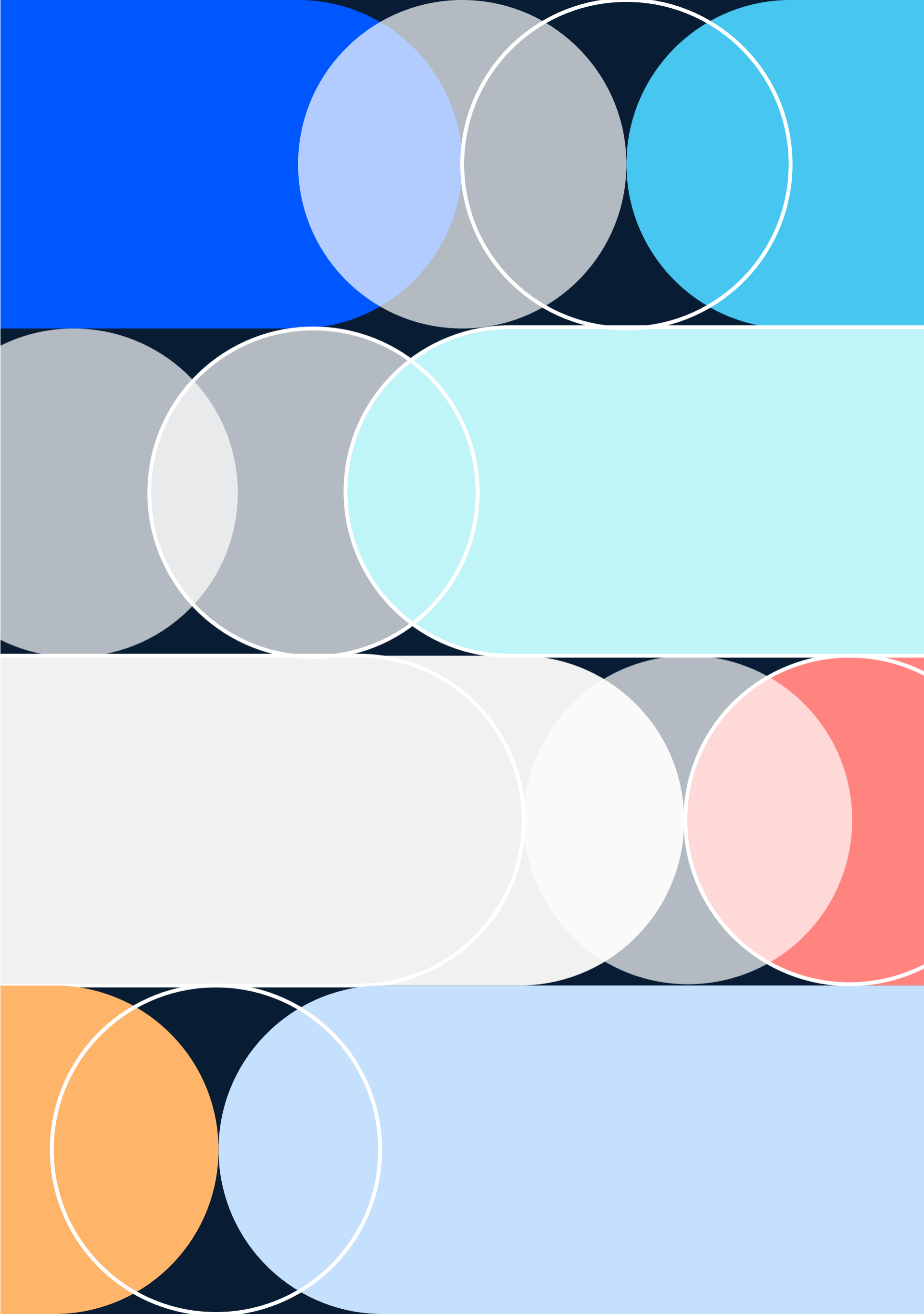




The Onboarding Starter Kit



STARTER KIT

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1 Why customer onboarding matters

Great onboarding isn't just about introducing new signups to your product or service. It's a process of continuously engaging your customers to help them see value as quickly as possible.

In the digital age, online companies have two key priorities when it comes to their customers: attraction and retention. Effective onboarding keeps your customers engaged from the moment they sign up for your product or service, helps them achieve ongoing value, and ultimately encourages them to become long-term, loyal customers.

But what's the secret ingredient for onboarding success?

Gone are the days where cookie-cutter messages blasted out to everyone on day one, day five, and day 30 were good enough.

Today's customers want and expect personalized, in-context messages. That means automatically sending the right message to the right person at the right time – while they're using your product, app, or website.

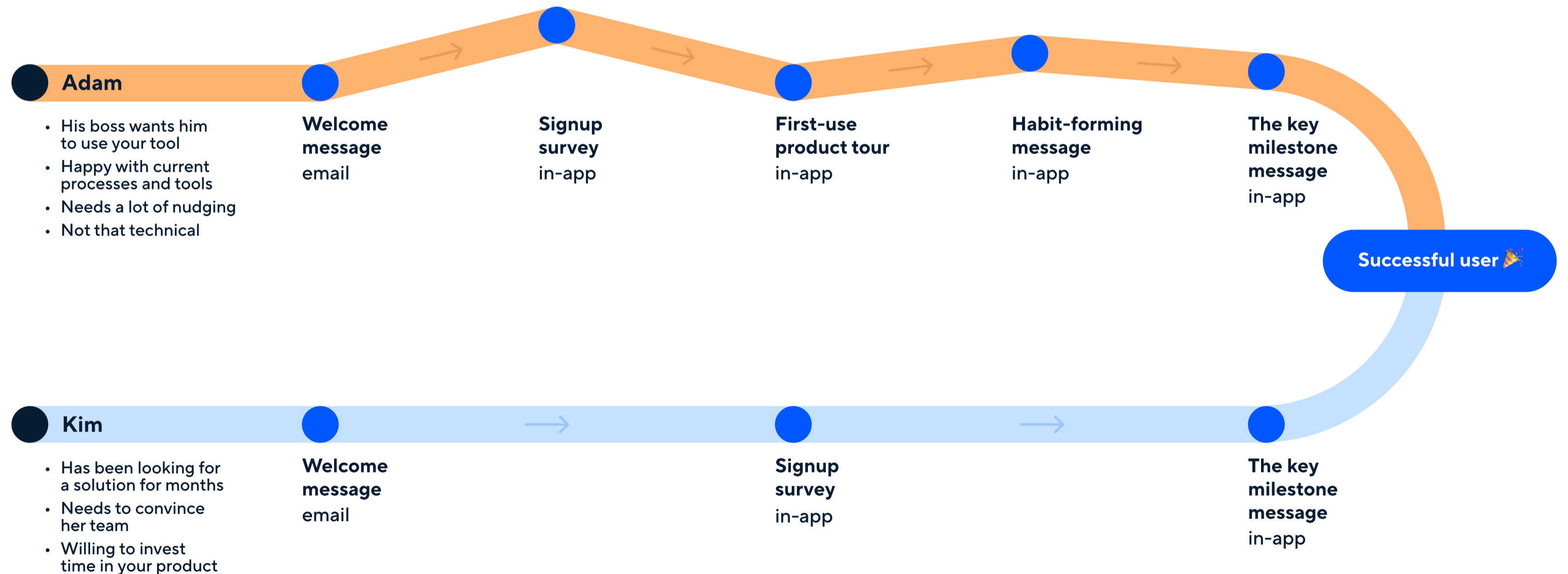
Siloed, one-off, unrelated messages aren't enough either.

Creating a series of well-crafted, sequenced, timely onboarding messages will help get new signups on the road to success and remove any stumbling blocks they may encounter along the way.

Aligning all these elements so that they work effectively can seem daunting, especially when you think of all the flows and steps involved. But with the right modern strategies and tools it's possible and simple to create a truly impactful onboarding campaign – completely code-free. In this guide, we'll show you how.

2 What a good onboarding campaign looks like

According to a recent [McKinsey report](#), 76% of customers said personalized messages were essential in enhancing their consideration of a brand, and 78% said personalized communication made them more willing to repurchase. A successful, multistage onboarding campaign means providing customers with the information they need at the right time, based on their product or service usage (or lack thereof). Here's an example of how two different customers could experience the same campaign.



3 Onboarding campaign best practices

“With Intercom’s help, Stuart has successfully onboarded over 17,000 users to-date.”



 stuart

Andrew Baylis

VP of Global Business Support at Stuart

Set a goal for your onboarding campaign

Before you sit down to plan your campaign, you should ask yourself: what is the action you’re trying to persuade people to perform? This will give your campaign a clear focus and purpose – and help you avoid sending messages when people don’t actually need them. For example, your goal could be to get users to use a feature 10 times, or to complete their first course.

Prioritize what your customers see first

Successful customer engagement depends on sending the right message, at the right time, and in the right place. Some of your onboarding messages, such as your welcome message and first-use product tour, are mission critical and should greet your customers when they enter your product, website, or app for the first time. Others, like your re-engagement message, can be sent via email to re-engage inactive customers. Make sure your campaign prioritizes what message to send when, and on what channel.

Space out your messages

Onboarding is no time to be shy. But you also need to make sure you're not over-messaging your customers. Decide how long you would like to leave in between reaching out (we recommend a minimum of 2 days). This prevents you from annoying customers with new messages when they haven't even had a chance to act on the last one.

“Overall we have seen in-product messages convert 8x higher than the same messages sent by email.”



 GetAccept

Dai Wilson

VP of Sales & Growth Marketing at GetAccept

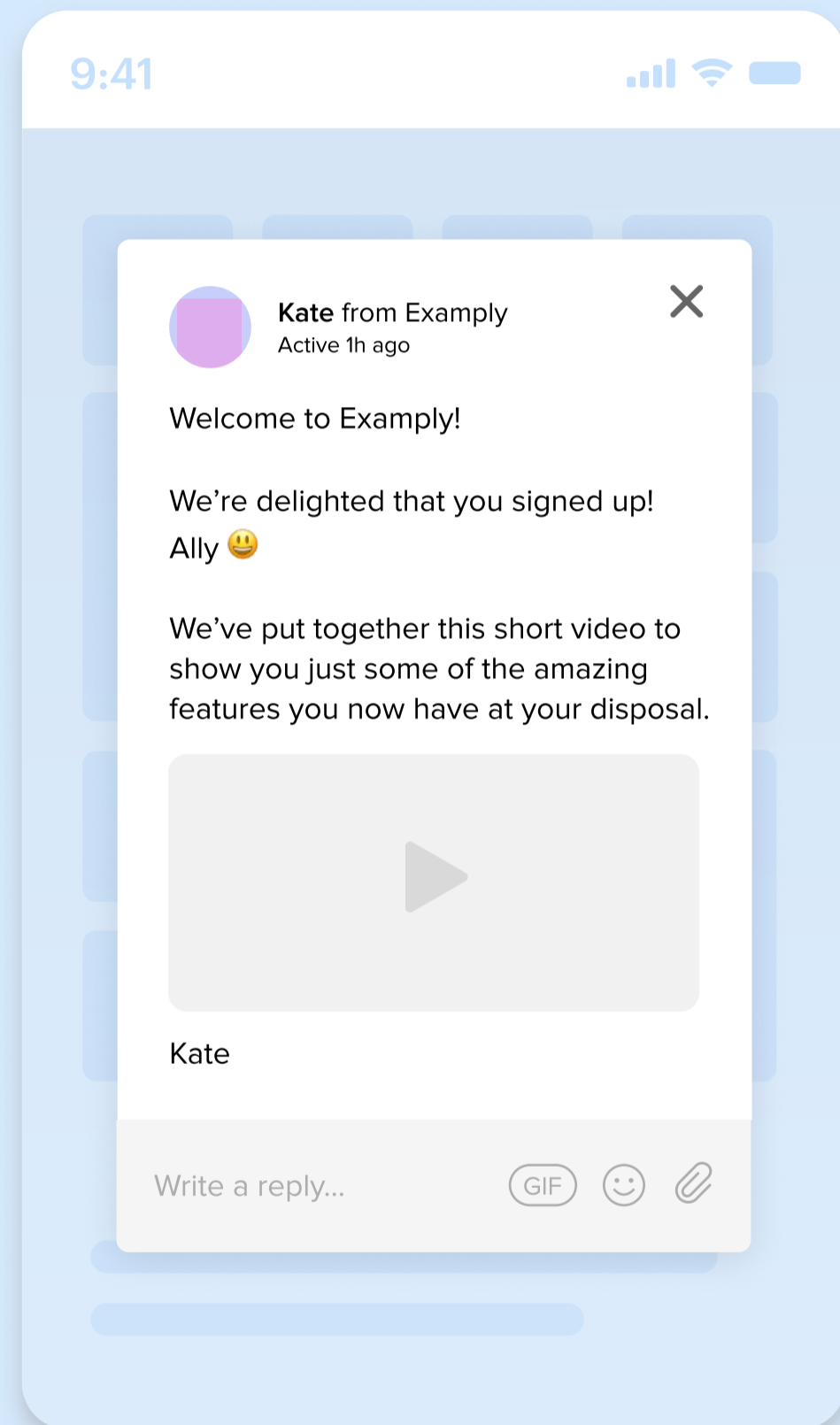
Show upfront value with in-app messages and product tours

The most effective way to engage customers is in the moment when they're most likely to take action – *while* they're using your product, app, or website. Sending well-crafted in-app messages and product tours in-context based on actions customers do or don't take will lead to “aha moments” that show your customers early and ongoing value. When customers experience upfront value, they'll spend more time on your product or service in the future, leading to higher retention.

Trigger based on behavior

The best behavior-based messages feel personal, not spammy. For example, you can trigger messages based on actions people take in your product or service (e.g. hasn't used feature X), the outcome of other messages (e.g. hasn't opened welcome message), or how much time has passed since an event (e.g. hasn't logged in for 14 days).

4 What messages should I be sending?



Welcome message – in-app and email

You know the standard “Thanks for signing up for Examply” email you typically get right after you put your credit card back in your wallet? This is a missed opportunity for most businesses. Why tell them things they already know (“You signed up!”) when you could take the chance to build a personal, valuable connection from the get go?

Instead, here’s how to create a great first impression:

- Greet customers by name, and let them know you’re excited they’ve signed up.
- Make it clear you’re there to help them.
- Lay out the next most impactful steps they can take to get started, whether it’s creating a new project or customizing their news feed.

👁 Pro tip

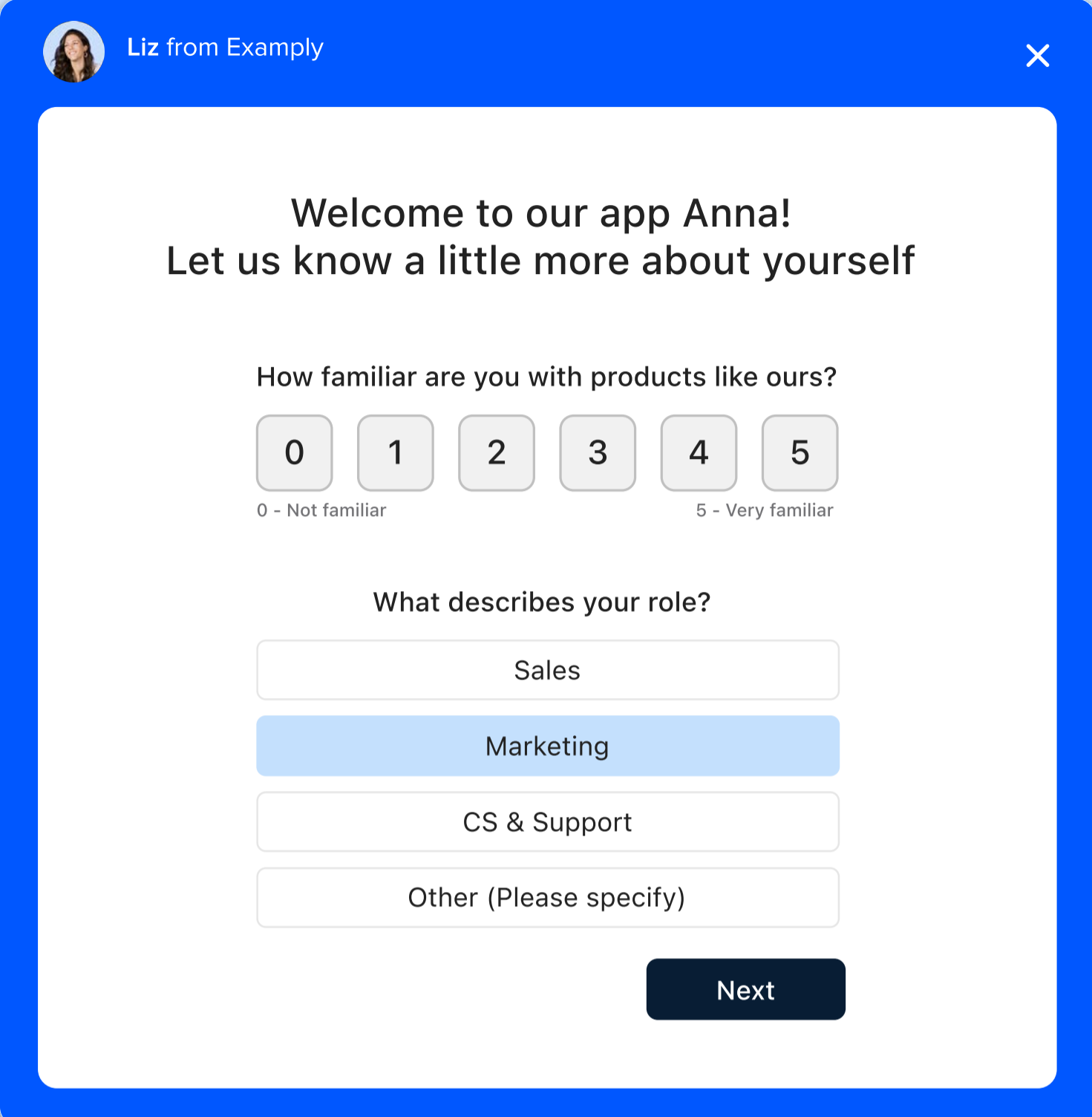
The welcome message is one of those rare times we recommend sending both an email (right after signup) and an in-app message (the first time someone logs into your product or service).

Signup survey – in-app

As much as you can, you want to provide your customers with personalized onboarding experiences so they can get exactly what they need from your product or service. This is where a quick signup survey can help. With just a few questions, you can get a better idea of what your customers are trying to accomplish, and which of your features make the most sense for their use case.

Include questions such as:

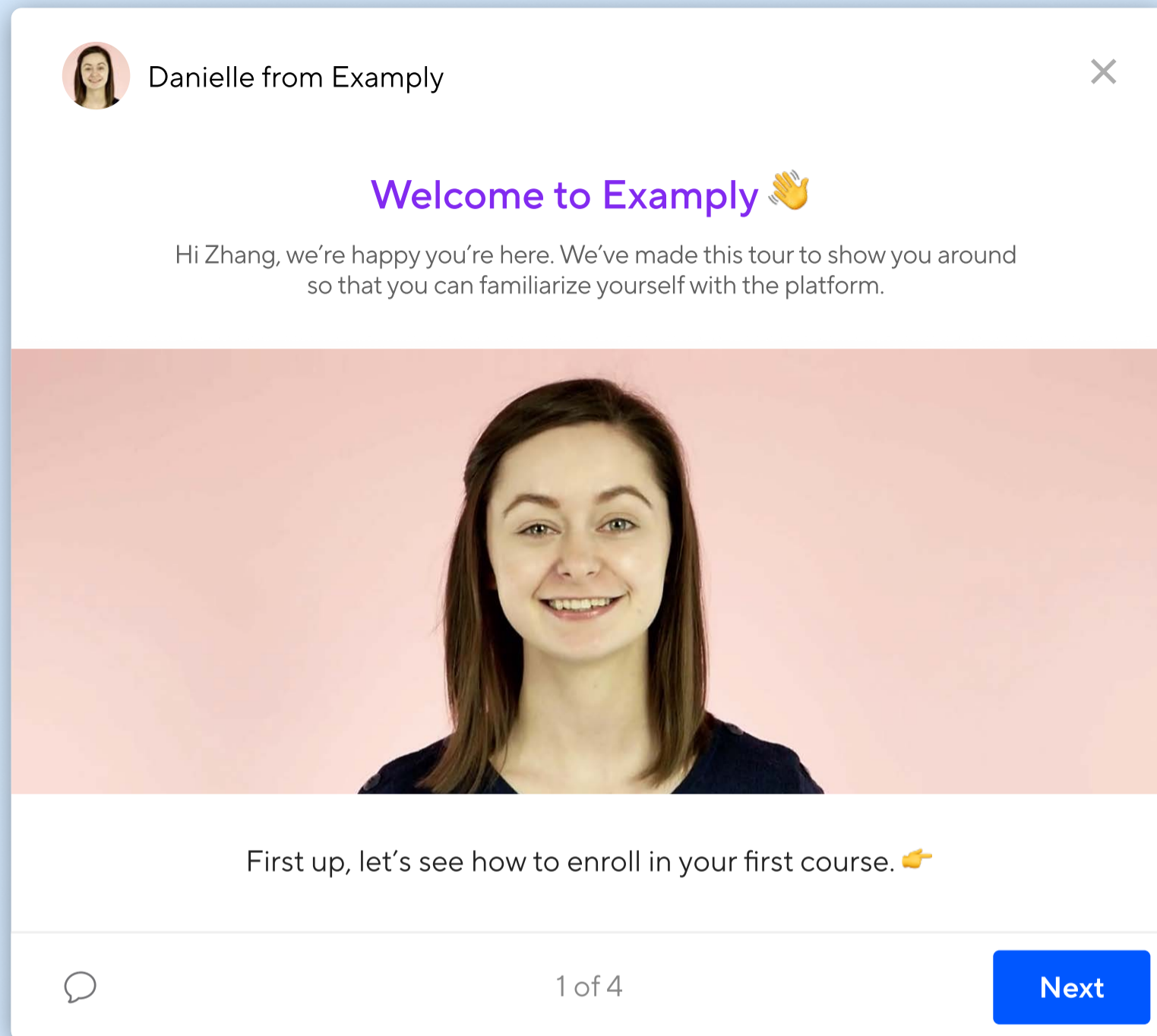
- What brings you to the app? (multiple choice)
- How familiar are you with products like ours? (numeric scale)
- What are you trying to [build/accomplish/solve]? (multiple choice)



The screenshot shows a blue-bordered modal window titled "Welcome to our app Anna! Let us know a little more about yourself". It features a user profile picture and name "Liz from Examply" in the top left corner. The survey consists of two questions. The first question is "How familiar are you with products like ours?", with a numeric scale from 0 to 5. The scale is represented by six buttons: 0, 1, 2, 3, 4, and 5. Below the buttons, it says "0 - Not familiar" and "5 - Very familiar". The second question is "What describes your role?", with four radio button options: Sales, Marketing, CS & Support, and Other (Please specify). The "Marketing" option is selected. A "Next" button is located at the bottom right of the modal.

👁 Pro tip

Keep your survey short and make every question count. The goal is to understand who your customer is and what they need so you can tailor the onboarding experience accordingly.



👁 Pro tip

Wrap up your product tour with clear next steps and useful resources that indicate to your customers what else they can do in the app and how else they can make the most of it. For example, you can point them to a handy guide or video demo that shows them how to achieve maximum success with a specific feature.

First-use product tour – in-app

When a customer first arrives in your product or service, they'll need help learning the ropes on how to use it. This is a great opportunity to provide upfront value. Set up a first-use product tour to guide customers through your solution, point out the things that will be useful to them (based on their survey responses), and nudge them to take the next meaningful step on the path to achieving their goals.

When putting together a product tour, consider the following elements:

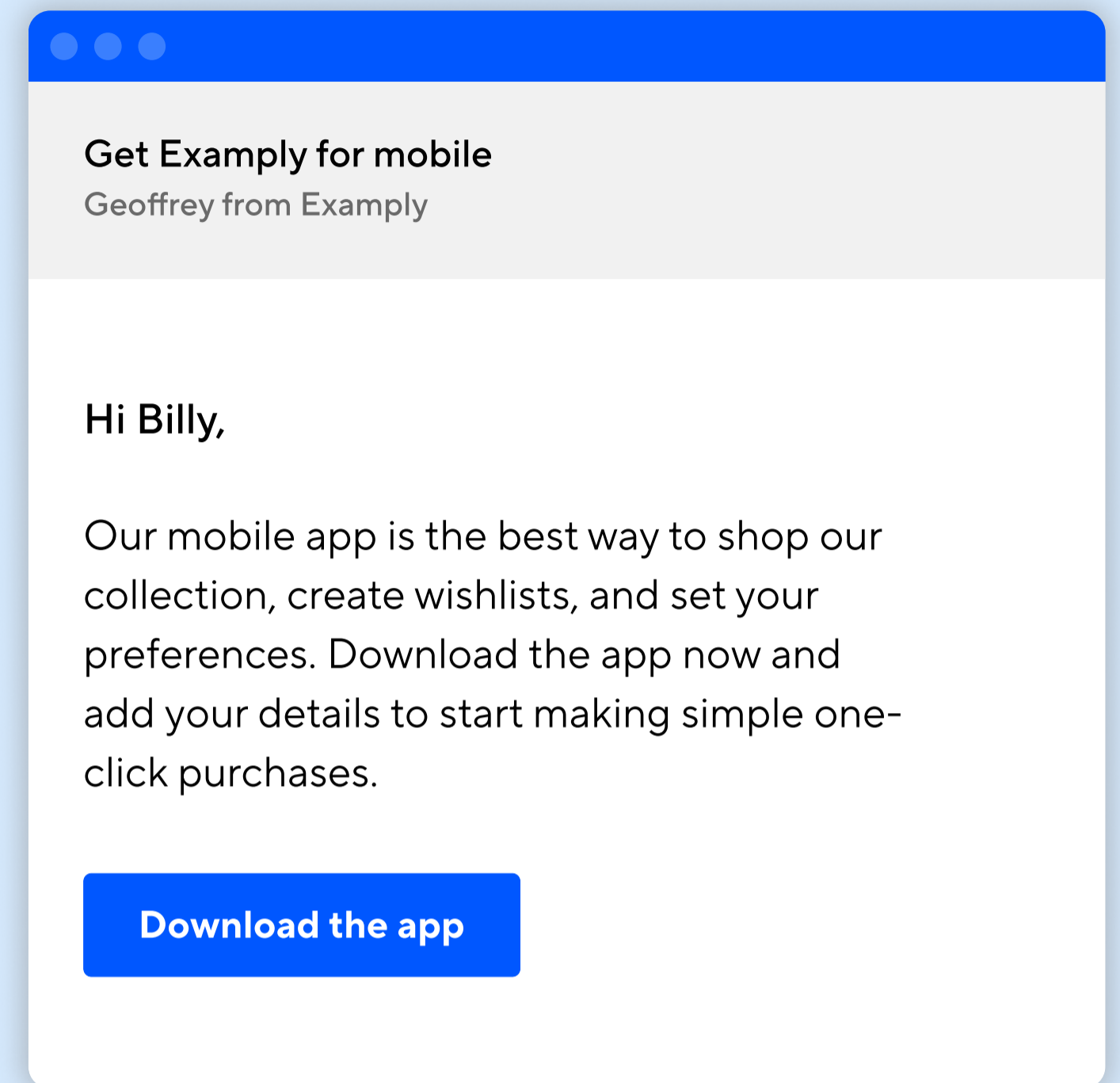
- Give customers a warm greeting: keep it personal by either adding a video or image of one of your teammates.
- Set the stage: tell users what they will get out of the product tour. This will give them a chance to drop off if they feel they already know the content.
- Highlight the most important features to help them achieve the outcome you specified at the start.

Habit-forming message – email

Facebook. Twitter. Google. Slack. These companies all have one thing in common – they create habits among their users. By getting new users to integrate your product across multiple platforms, including the mobile device they look at multiple times a day, you’re increasing the likelihood your product will become a recurring part of their lives.

Here’s how to make key habits stick:

- Identify the most important habits you’d like your users to adopt. For example, if your product is available across several platforms, send an email encouraging customers to download your mobile app.
- Make it clear why they should take this action – what benefits will they get from it?
- Make it easy to take action by providing a clear next step.



👁 Pro tip

Target with intention. It’s a good idea to target users who have started using your app but who have since abandoned progress. For example, if you have a shopping app, you can target those who signed up less than 30 days ago, who added an item to their cart, then abandoned it.

Lauren from Examply

Hi Carol,

Congrats on completing your 10th to-do list. 🎉 That's awesome progress! To thank you for being an active customer we're offering you a 10% discount off your subscription next month.

Don't worry, you don't have to do a thing. We've already credited your account. Happy productivity!

Lauren



🕒 Pro tip

Celebrate your customer's milestones big and small throughout their onboarding journey. This will give them the confidence they need to keep upleveling their skills and move onto progressively bigger achievements.

Milestone message – in-app

Celebrate customer progress by recognizing major milestones. Sending celebratory milestone messages to customers, such as after they've created their first project or completed their 10th to-do list, can not only nurture the relationship, but also further engage the customer. The milestone message should make the customer feel good about themselves and motivate them to continue on their onboarding journey.

Here's how to celebrate your customers' biggest milestones:

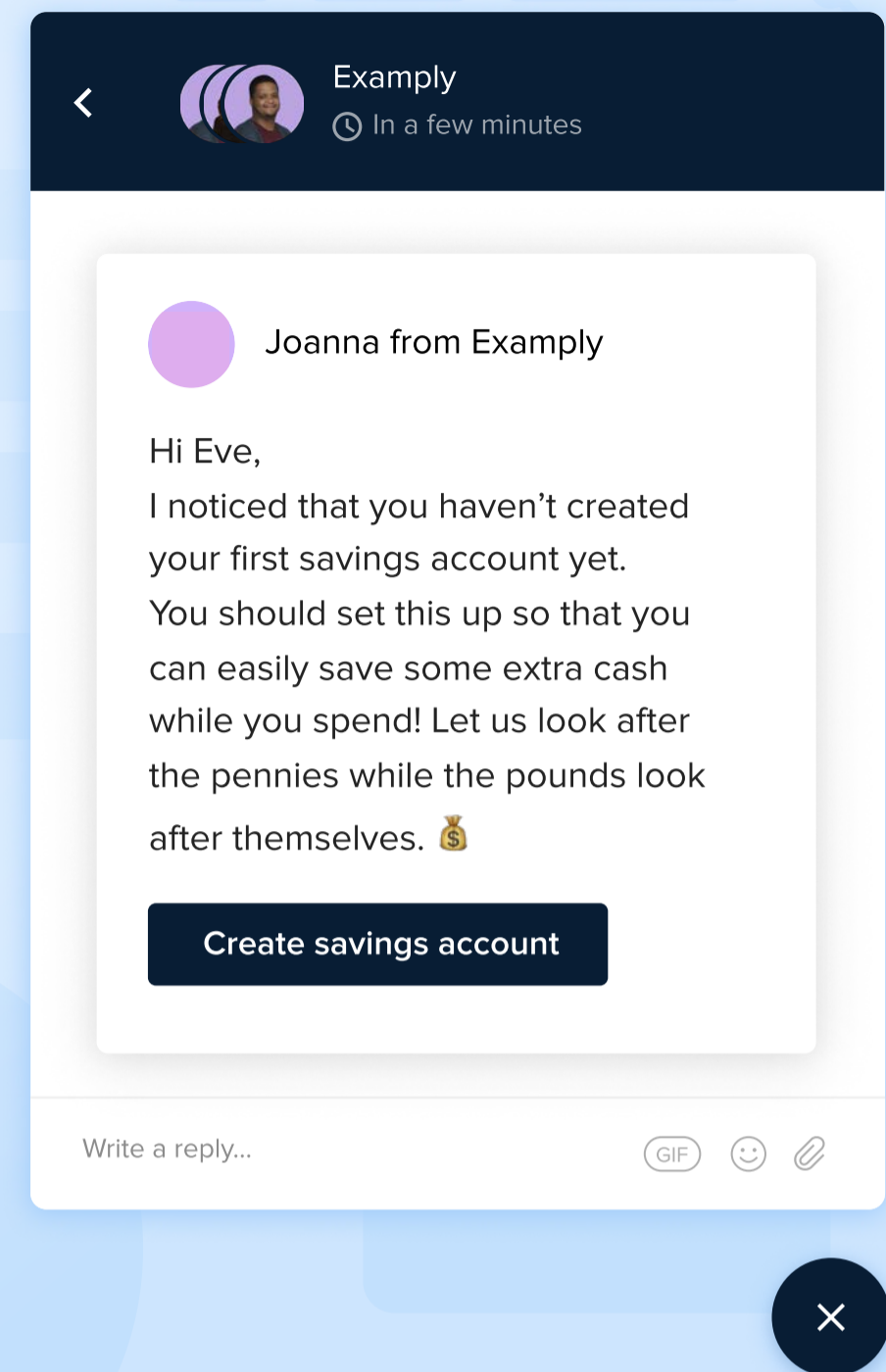
- Show genuine appreciation and thank your customers for their loyalty.
- Personalize your message for each customer. For example, you can create a custom attribute that tracks how many to-do lists your customers have created and add it as a variable. Then when the customer gets that message, it will display how many to-do lists they've created.
- This is the perfect occasion to give engaged customers a gift, like a discount or voucher, to create goodwill and encourage further progress. For example, you could give them a discount off your product and surprise them by crediting their account.

Key feature message – in-app

The seeds of churn are planted early. Very often it's during those all-important few days between when a customer has signed up, but before they've used that killer feature all your successful customers are using. For example, if your product is a finance app and you know someone hasn't created a savings account yet, you also know they stand a very poor chance of saving money. And if they don't save money soon, they're going to churn to a competitor. A well-timed in-app message can encourage usage and increase retention.

Here's how to encourage customers to take the first few meaningful steps:

- Identify the most important steps new customers can take. If in doubt, ask your product or analytics team what features typically lead to the biggest adoption and retention.
- Highlight the benefits of taking the action. Make it a no-brainer by telling them what they stand to gain.
- Make it easy for customers to take the next step by including a link or button.



👁 Pro tip

Set up a message that triggers to all new users who haven't carried out the step you want them to take two days after sign up. Your filters here would be something like "Signed up more than three days ago" and "Sent message is false".

5 How to measure success

Map your campaign goal to business impact

There's no universal definition of a fully onboarded customer. After all, onboarding should be a continuous process of guiding customers towards success with your product or service at every stage of their journey. However, a good proxy to consider a customer initially onboarded is when they've achieved one or more successful milestones. For example, for a project management tool, a successful milestone could be "completed one project" or for a productivity app, it might be "more than 20 to-do lists completed". Decide what success means for your business and set your goal accordingly.

Measure responses for individual messages

Open and click-through rates will give you an idea of how your messages are engaging customers. But it's even more powerful to track actions customers do or don't take after receiving individual messages. For example, of those who received the "key feature" message, how many used the feature afterwards? Or, of those who received the "habit-forming" message, how many downloaded your mobile app?

“Intercom provides Angi with opportunities to engage our existing customers, onboard new ones, and educate them at the right time in the user journey. A big benefit is having another channel to reach our users through chat and in-product messages.”



Angi

Karissa Luttrell

Director of Product Marketing at Angi

Check in with customers and ask for feedback

Onboarding campaigns can also be measured qualitatively by talking and checking in with your customers regularly. You'll understand whether they've achieved success with your product, and if not, what's preventing them from doing so.

6 Checklist for getting started

Set up your welcome message via in-app and email to greet new customers.

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Personalize the onboarding experience with a signup survey.

.....

Guide new users through your product or website by creating a first-use product tour.

.....

Encourage repeat visits with a habit-forming message.

.....

Use milestone messaging to celebrate achievements, both big and small.

.....

Trigger an in-app message to users who haven't tried your key feature.



Build long-lasting customer relationships with Intercom

Interested in creating a
personalized, timely onboarding
campaign that builds long-lasting
relationships with customers?

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