Client Onboarding Manager Cheat Sheet

by Flowla

Role overview: Client Onboarding Manager

A client onboarding manager act as a bridge between clients and internal teams, ensuring a seamless onboarding experience.

Key duties

Understanding client needs
Conduct discovery to assess business goals and unique needs.

Creating the onbarding plan
Develop a tailored plan with actionable steps, timelines, and key tasks.

Establishing communication
Keep the client and internal teams in touch, updating key stakeholders at important milestones.

Training and education
Conduct sessions to empower clients to use the product independently.

Addressing concerns
Hold check-ins to answer questions, mitigate concerns, and manage expectations.

Gathering feedback
Collect insights to refine processes and enhance the customer experience.

Upselling opportunities
Recognize moments to introduce additional products or services that fit client needs.

High-Touch vs Low-Touch Onboarding

High-Touch Onboarding

High-touch onboarding involves personalized, hands-on support with frequent interactions, tailored training, and proactive communication, aiming to build deep relationships and ensure customer success.

Low-Touch Onboarding

Low-touch onboarding relies on self-service tools like automated guides, standardized tutorials, and minimal personal interaction, prioritizing efficiency and scalability over individual customization.

6 steps to successful client onboarding

Follow these six key steps for a smooth and effective start to an effective client onboarding.

01

Timely welcome

Reach out immediately after receiving client contact info to schedule the kickoff meeting to review the onboarding roadmap for a smooth partnership, build trust, and explain the onboarding timeline.

02

Needs assessment

Hold a dedicated session or send an onboarding questionnaire to understand the unique challenges, goals, and desired outcomes for maximum value from your product.

03

Setup

Assist with account creation, configuration, and access to necessary tools to ensure the client is technically prepared to begin using your product independently before moving to deeper engagement.

04

Education

Provide training sessions, guides, and resources to teach clients how to use your product efficiently to make them more successful and loyal. Ensure materials are accessible and organized for future reference.

05

Establish communication channels

Determine the client's preferred communication method (e.g., email, Slack). Make it easy for clients to reach out when needed and ensure they know who their main point of contact is.

06

Ongoing support

Schedule regular check-ins to ensure clients are progressing and answer any questions. Continue to provide support and troubleshoot as needed until clients are comfortable using the product.

Best practices for effective customer onboarding

Things to keep in mind and pro tips for effective customer onboarding planning.

Plan ahead

Prepare the onboarding plan in advance, complete with steps, timelines, and resources. Ensure everything is in place to avoid delays once the onboarding process begins.

Personalize the experience

Tailor the onboarding to the client's specific goals and challenges to enhance the client's experience by showing that their unique needs are understood and addressed.

Clear communication

Share a clear roadmap, timelines, and what clients can expect at every stage to build trust and transparency by ensuring clients are informed at every step.

Stay organized

Keep all onboarding materials, steps, and contacts in a centralized space for easy access. Eliminate confusion and friction, making the process smoother for the client.

Gather feedback

Regularly solicit client feedback on the onboarding process. Continuously improve the process based on client insights.

Sample client onboarding workflow

The onboarding workflow includes introduction, assessment, training, check-ins, and final evaluation.

Day 1: Initial introduction

- Welcome email: Introduce key team members, outline the onboarding process, and schedule a kickoff meeting.

Week 1: Needs assessment & setup

- Discovery session: Finalize client goals, needs, and pain points.
- Technical setup: Help the client configure their account and handle any remaining formalities.

Week 2: Training & customization

- Training session: Walk the client through the product and provide all relevant resources.
- Customization: Adjust settings based on the client's feedback and goals.

Ongoing: Checkpoints & progress reviews

- Regular check-ins: Review the client's progress, address challenges, and gather feedback.
- Celebrate milestones: Acknowledge key achievements during the onboarding process.

Weeks 4-6: Post-onboarding evaluation

- Survey/Review: Collect feedback about the onboarding experience and identify areas for improvement.

Handhold your customers with Flowla

Speed up onboarding and reduce time-to-value with a smooth, frictionless experience your customers will love.

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