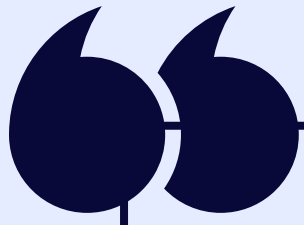


First Value Delivery Cheat Sheet

Onboarding Frameworks by Irit Eizips



The two most overlooked aspects of customer onboarding, that are absolutely critical to nail to help reduce customer churn are: [First Value Delivered](#) (FVD) and [Time to Wow](#) (TTW). Taking the time to bake both aspects into your customer onboarding experience will boost loyalty and Lifetime Value

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Effective customer onboarding is crucial for building long-term relationships, driving loyalty, and ensuring business success. This cheat sheet provides concise, actionable steps to enhance your onboarding processes and deliver tangible value from the start.

Common mistakes in customer onboarding



| | ISSUE | SOLUTION |
|-------------------------------------|--|--|
| Letting customer dictate the scope | Misaligned expectations and outcomes | Balance customer input with strategic guidance |
| Task completion over value delivery | Focusing on tasks rather than actual benefits. | Aim to deliver tangible benefits that meet customer goals. |
| Ignoring the first value milestone | Delayed success and satisfaction. | Ensure customers quickly realize the benefits of your product/service. |
| Choosing overly complex scopes | Hindered adoption and momentum | Select achievable goals providing immediate value. |
| Neglecting broader value delivery | Impacts overall success and satisfaction. | Focus on continuous value aligned with long-term goals. |

Effective onboarding frameworks for value enhancement

01

Strategic outcome alignment framework

Goal: Align business objectives with customer value KPIs.

Action: Set clear expectations, link objectives to KPIs, and track progress.

02

Quick wins identification framework

Goal: Achieve small, early successes.

Action: Identify and deliver quick wins to build momentum and confidence.

03

Customer-centric adoption framework

Goal: Simplify onboarding and enhance user adoption.

Action: Select goals that are easily understandable and provide immediate benefits.

04

Communication and feedback framework

Goal: Maintain proactive communication and feedback loops.

Action: Engage continuously, tailor onboarding to customer needs, and adjust strategies in real-time.

How to achieve long-term CS through onboarding?

- Deliver tangible benefits from the start to establish trust and encourage engagement.
- Align onboarding processes with business objectives and customer value KPIs.
- Establish clear communication channels to understand customer expectations and preferences.
- Regularly review and refine onboarding processes based on feedback and performance data.
- Use data and analytics to optimize onboarding and ensure effectiveness.

Next steps

01

Identify areas for improvement in your current onboarding processes.

02

Outline key outcomes, prioritize quick wins, and enhance the customer's initial experience.

03

Invest in tools to track progress and set up health scores for effective monitoring.

04

Invest in tools to track progress and set up health scores for effective monitoring.

