



Onboarding materials

- ❑ Create a detailed help center describing your functionality and answer all common questions
- ❑ Write a few use cases about your clients and their successes
- ❑ Shoot a short video introduction that you can later repurpose on different stages of your onboarding process

Email sequence

- ❑ Collect basic client information during the registration process like an email address, name, company.
- ❑ Set up an automated welcome email that gets sent after a client signs up for your product. Can include a short video introduction.
- ❑ Set up an email follow-up for clients that hasn't completed the first key product adoption step.
- ❑ Set up a short email sequence encouraging customers to use more advanced functionality and offering corresponding educational materials.
- ❑ Set up an email report celebrating important milestones performed by a client.

In-app product tours and tooltips

- ❑ Create a first welcome window that will greet new customers once they sign up for your product and shortly tell them what's what. Can include a short video introduction.
- ❑ Create modal windows or feature callouts that pop up automatically and walk a new client through the first product adoption steps.
- ❑ Set up an in-app checklist that will show customers their onboarding progress.

Personal onboarding assistant

- ❑ Track clients' progress in completing previous onboarding steps.
- ❑ Schedule an onboarding call between a new client and your customer success team.
- ❑ Gather detailed client information like their goals, objectives, use cases.
- ❑ Give personalized recommendations regarding your product.
- ❑ Send an email follow-up after the onboarding call with necessary materials.