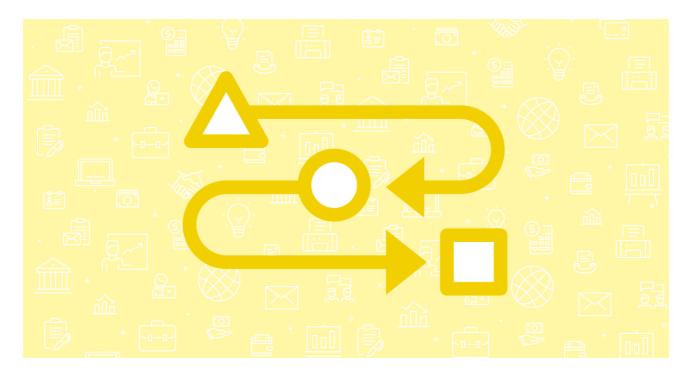
SaaS Customer Service Onboarding Checklist

It's important that your customer has a personalize and unique experience online. Follow these process to ensure a great onboarding experience.



CUSTOMER SIGN UP

Is it easy for a customer to sign up. Do they sign up with a credit card or is there a trial period?

CONTENT UPGRADE

Does you customer receive something for signing up for your product or service? It can be something the download or is emailed to them. A few examples are, checklists, a guide, ebook, printable, templates, even a free trial.

WELCOME EMAIL

Decide if you are going to send out a welcome email to explain everything or have a welcome email with a series of drip emails throughout a trial period.

PRODUCT TUTORIAL

How does your customer find out how to use your product or tool? Are their help videos or questions? Do you email them to see if they have questions? Do you offer online support? Do you have webinars for you customers?

FIRST LOGIN

What does your customer experience when they first log in? Do you have a welcome page, links to tutorials, do they have to set up an account or import data?

ADDITIONAL EMAILS

If you have a drip campaign set up that's great. Drip emails should include things like explanations of features or tutorials. But do you offer a discount to sign up (CTA) after your customer's trial is over?

NOTIFICATIONS

Do you have notifications set for your customers. Reminders or pop-ups are a great tool to have.

CUSTOMER SUPPORT

Yes, your customer can contact support but do you email your customers a personalized email to offer support or onboarding? In your email you can also offer your customer a personalize phone call or set up a zoom.