

CUSTOMER ONBOARDING FRAMEWORK

Great onboarding helps customers to quickly get up-to-speed so they can start experiencing the benefits of using your product.

This handout contains a series of activities to help you plan your customer onboarding strategy.

The logo for Wildbit, featuring the word "WILDBIT" in white, uppercase letters on a dark green rectangular background with vertical stripes.

STEP ONE

Know Your Customer

Let's get started by taking some time to think about the goals and expectations of your ideal customer.

Who is your customer?

What are their goals?

STEP TWO

Identify Your 'WOW' Moment

List all of the activities a customer may perform when using your product and group them based on the level of engagement they require.

Low Engagement

Medium Engagement

High Engagement

Which of these is your 'WOW' moment?

The 'WOW' moment

The point at which a customer feels the true value of using your product.

How can you help customers reach your 'WOW' moment?

STEP THREE

Plot Your Customer Journey

Order the activities you defined in step two chronologically and use them to plot your *ideal* customer journey.

	Low Engagement	Medium Engagement	High Engagement
Time			
x Activity			
o Touchpoint			

STEP FOUR

Define Your Touchpoints

Building on the activities you listed in steps two and three, define touchpoints that will help to guide the customer through your customer journey.

Low Engagement

Medium Engagement

High Engagement