Onboarding maturity model

Consider each of the below questions in relation to your own company's customer onboarding process.

Use the check boxes below to mark where your onboarding process is on a scale of 'Not at all' to 'Well established'.

Consider where you see the majority of checked checkboxes in order to assess where you fit overall in relation to the maturity model
.
How could you improve on some of these?

Build	Developing	Growing	Optimizing
Needs identification Org structure Metrics & reporting Customers are getting little value	Repeatable process Journey map Surveys Customers see value	Scale processes Digital program Standardize Experience	Automation Customization 1 : Many experience Customers see high value

	Little value	Growing value		High value
	Not at all			**Well established**
Documentation & structure — Do you have a documented onboarding process that outlines each step a customer should take from start to finish?	☐	☐	☐	☐
Personalization — Is your onboarding process tailored to the unique needs and profiles of different customer segments or personas?	☐	☐	☐	☐
Feedback loop — Is your onboarding process tailored to the unique needs and profiles of different customer segments or personas?	☐	☐	☐	☐
Onboarding metrics — Do you track key performance indicators (KPIs) related to onboarding such as time-to-value, customer satisfaction scores, and early product usage metrics?	☐	☐	☐	☐
Iterative approach — How frequently do you review and update your onboarding process based on data and feedback?	☐	☐	☐	☐
Resource availability — Are there easily accessible resources (e.g., tutorials, FAQs, webinars) available to customers during the onboarding process?	☐	☐	☐	☐
Cross-functional collaboration — Is your onboarding program a collaborative effort that involves teams beyond customer support, like product, sales, and marketing?	☐	☐	☐	☐
Churn analysis — Do you analyze reasons for early-stage churn to identify if there are gaps or pain points in the onboarding process?	☐	☐	☐	☐
Proactive support — Does your program include proactive check-ins or milestones where the onboarding team reaches out to new customers to offer assistance or gather feedback?	☐	☐	☐	☐
Continuous learning & training — Do you offer continuous learning opportunities, training sessions, or advanced resources for customers who have completed the initial onboarding process?	☐	☐	☐	☐