Onboarding framework

		Theme	Reason	Timeline	Channel	Sample text
MEET AND GREET	**Step 1**	Introduce yourself	If you're taking over from sales, get your relationship off to a good start by introducing yourself (personally and professionally). Remember, first impressions count and last so make sure this is something that sets you off on the right foot. In some cases this might be you, in others it could be an Account or Customer Success Manager, for example.	Immediate	Email	Hi [insert name], My name's [insert name] and I'm a [insert job title] here at [company name]. I've been working in this field for X years and I'm on hand to help if ever you need it. Since we'll be working together over the next couple of months and so you can get to know me a bit better, here are a few professional and personal facts about me: - I graduated from X university - I've a wife and three kids - In my spare time, I'm very partial to a bit of kayaking! Below are all my contact details and please don't hesitate to get in touch if/when you need to chat.
	Step 2	Give a warm welcome	Guide people into the next stage of their set-up so they know what's coming. Personalise this where you can too - including the individual's name, company and type of plan (i.e. freemium, basic, premium, etc.).	Immediate	In-app	Hey [insert name], Welcome to your [account type] with us! After this message, you'll be given the option to follow us around a guided tour of the product - if this is your first time using [insert product name], we'd recommend it. Have fun exploring and let us know if you or anyone else from [customer's company name] needs any help! Thanks, [company name]
	Step 3	Provide step-by-step support	Don't say hello and then leave people to their own devices. Create a series of walk-through messages or a video tutorial to explain where everything is and how users can make the most of your features.	Immediate	Email or in-app	Us again! Simply click through the instructions to be shown around or if you'd prefer, we've made a video tutorial for you **here**.
	Step 4	Make key contacts and locations known	If someone's struggling and needs help the last thing you want is them suffering in silence. Send a message letting them know where they can find useful resources and who to contact if they've still got questions.	Immediate	Email or in-app	One last thing... If you find yourself in a pickle we've got tonnes of resources in our Help section **here**. If you still can't find what you're after, you can reach our customer service team on [insert number] or at [insert email]. That's all from us now!

USE MORE	**Step 5**	Acknowledge activity	To drive future usage, acknowledge when a new user's used feature X for the first time and list some more use cases for them to return to it again. The aim here is to make sure they see the value in repeat usage.	User's first action	Email or in-app	Hey [insert name], Awesome, you just created your first [insert action]! To keep getting the most out of this feature in the future, here are some other popular uses for it: - Use case 1 - Use case 2 - Use case 3
	Step 6	Send a reminder	For those who don't show any activity, follow-up to remind them you're here and use this message as an opportunity to demonstrate your value. These kinds of messages can also be used for users who are active but just aren't making use of key features - i.e. "Did you know you can also...."	Day 7	For those who are inactive, email. For those who are active, in-app *or* email.	Your [insert product name] account is ready and waiting for you! For help getting started, check out this tutorial we put together and for a reminder of why you created an account with us in the first place, see what current customers are achieving with us **here**. OR It looks like you're getting lots of use out of features X and Y, great! But did you also know, with feature Y you can do A, B and C?
	Step 7	Check-in	Make sure new accounts have got everything they need to keep progressing with you.	Day 10	Email	Hi [insert name], This is just a friendly reminder that we're here for you. If there's anything else we can do to help you get more out of [product name], let us know and we'll be right by your side.
CHURN LESS	**Step 8**	Tactical feature messages	Encourage freemium users to convert into paying customers and those who're already paying to maximise your product (and stay) by feeding them with relevant and contextual how-to content. These messages should be seen as ongoing, not one-off. Just because someone's using your product today it doesn't mean they still will be next week, which is why it's so important to drive ongoing adoption and continually deliver value.	Throughout	Email, in-app or push	Hi [insert name], We've got an insider hack for you...if you use feature A to complete action B, you could benefit from X, Y, Z. To get in on the action head to our how-to guide on it **here**. P.s. Let us know if you want more or less of these kinds of messages: More please | That's enough
	Step 9	Re-engage quiet or inactive users	If you wait until someone's stopped using your product full stop there's a good chance you're already too late, so keep an eye on peoples' activity and if engagement starts to drop, hit them with a re-engagement message.	Week 2+	Email, targeted social ad and/or a phone call	Hey, we noticed you haven't logged in for a while... For more on how you can make the most of [product name] head over to our **Help** section - it's jam-packed with how-tos and use cases. Or, if you'd like to speak to an actual human, give our Customer Service Team a call on [insert number]
	Step 10	How are we doing?	Gauge how new users are finding your product and use the results to determine who to display the next two steps to.	Week 4	Email or in-app	We'd LOVE to know how you're finding [product name]! If you can spare a second or two, let us know by giving us your rating: **********

BUY MORE	**Step 11**	Up or cross-sell	Tease freemium and paid accounts with what else they could achieve if they upgraded with your current product/purchased a complementary one.	Week 6	Email or in-app	Fancy taking your experience with us to the next level? With our [insert up/cross-sell product name], you can achieve everything you already are as well as: - Feature/benefit 1 - Feature/benefit 2 - Feature/benefit 3
	Step 12	Fancy leaving a review?	The more reviews the merrier - they're great for both your marketing and customer research tactics, so, see if you can squeeze one out of your new users. Just remember to exclude any that expressed evident displeasure in **Step 9**.	Week 8	Email or in-app	A penny for your thoughts... If you like what you're getting from us and want others to reap the same rewards, please give us a minute or two of your time and let others know what you think **here**.