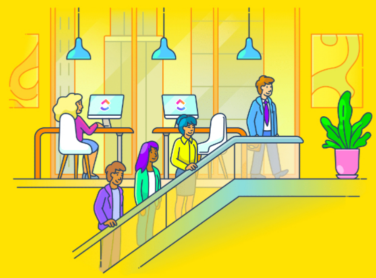

7 Client Onboarding Steps That Reduce Churn (With Templates)

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Success!

You've signed a new client to your agency. And now you're ready to show why they made the best decision investing in your team.

Even though you've got them to sign the agreement, you're still not done winning over these new clients. After the paperwork, you have to ensure the client onboarding process goes one step further to instill trust in your agency by showing them everything (and every step) they can expect.

In fact, a Wyzowl survey found 88% of respondents say they'll be more loyal to a business that prioritizes onboarding and educational content. While agencies will invest countless hours in pre-onboarding initiatives, it's not uncommon for them to go dark when finally converting a lead into a customer.

Sales teams will respond to RFPs, curate a project proposal, answer security questionnaires, and work with legal teams on contracting, but some will stop nurturing the client relationship after. However, there's a much easier way to prevent this disconnect by providing a complete client onboarding experience.

What is Client Onboarding?

Client onboarding is the process of orienting new users between the time when they purchase a product or service and when they actively start using it. This process helps clients learn all the features and benefits of the product so they get the total value—reducing the chance of churn.

What can agencies do to ensure long-term success with their list of clients?

Be as invested in their onboarding as they are in their lead generation. First impressions matter. Onboarding is your opportunity to set expectations to prevent scope creep, template customer experiences that reinforce your brand and create a positive client experience to increase profitability.

7-Step Client Onboarding Process

To help you improve or scale your client onboarding process, we put together seven steps—along with some helpful templates—that are sure to impress your new clients right from the start.

Let's get started!

1. Set clear expectations around your agency and what will be delivered

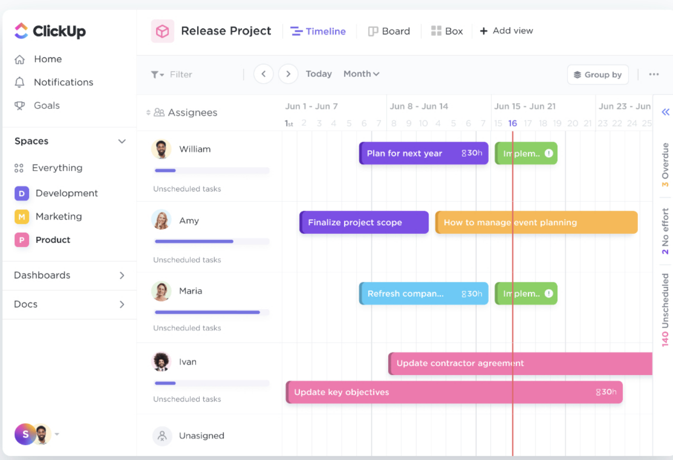
You did it! It's time to celebrate those weeks or months you spent building a relationship with a prospect that has finally become a customer. They've felt it, you've felt it, and it's a bright and shiny new opportunity to endear yourself to them.

A proper onboarding experience should do two things:

- First, you must confirm to your customer that they made the right choice in working with your agency.
- Second, you need to remove any uncertainty by clearly outlining what the client can expect from the relationship.

The former is the fun part and is traditionally done by sending your new customer a token of your appreciation. This can be a bundle of branded swag or some top-shelf scotch, depending on the tone your agency wants to set.

While it may seem unnecessary, these goodwill gestures elevate your agency to be seen as a partner rather than just another vendor to new clients. The little touches also do wonders to improve your Net Promoter Score (NPS).



The Timeline View in ClickUp gives a bird's-eye-view of your resources and tasks

The second part—setting expectations—is best done in an introduction email that clearly outlines what the client can expect from you. It should define the client onboarding process, introduce your points of contact, include a clear timeline of the next steps, and provide a client onboarding checklist.

This transparency reassures your new clients they made a good investment and bridges the gap between conversion and the onboarding process so they don't feel like they're left in limbo.

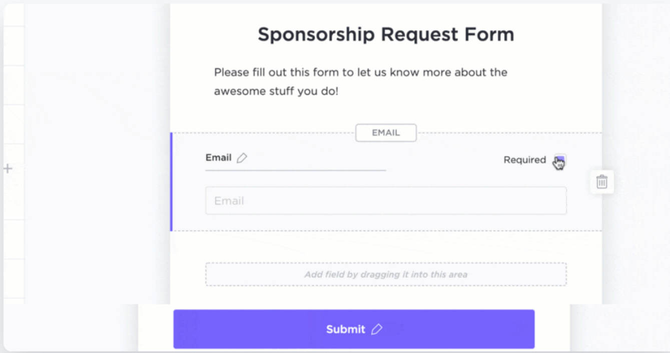
PRO TIP

Use automation triggers to keep track of where clients are in the onboarding process, celebrate milestones, and keep them moving forward. For example, your customer ops team should be automatically tagged when you change a lead's status from "prospect" to "new customer" as a reminder to send a welcome gift.

2. Design and send a client onboarding questionnaire

You probably conducted a preliminary assessment of the customer during your sales process to ensure you were a good match. Now that the client has signed, though, it's time to delve a little deeper into what exactly they're looking for. It's time for a client onboarding questionnaire.

An onboarding questionnaire is a crucial step in the client onboarding process. You can't even meet (let alone exceed) expectations without knowing what those expectations are and what existing assets the customer has to help you achieve them. That's what an onboarding questionnaire will help you uncover.



Easily set up forms in ClickUp with custom fields to collect the exact information you need

With the help of ClickUp's Form View, you can turn survey responses directly into tasks or simply collect the information you need from a client questionnaire. For example, customer onboarding questionnaires vary based on the product or service you provide, but a few questions you could include are:

- What overall goal(s) do you want to achieve with our product/service?
- What KPIs are you targeting over the next six months or in a year?
- How would you like to allocate your budget?
- Do you have any pre-existing resources or assets we can leverage to help you reach your goals?
- What are some examples of [insert service line] that you like?
- Who from your team will be our main point of contact, and who are your key stakeholders?
- What is your Ideal Customer Profile (ICP)?
- How do you hope our product/service will help you convert your ICP into customers?

These questions will help you determine how you can quickly show value based on the customer's specific needs and goals for the best customer onboarding process.

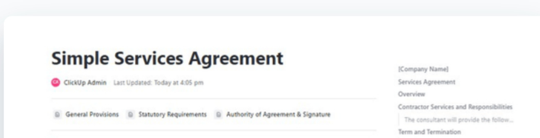
3. Create a service level agreement (SLA)

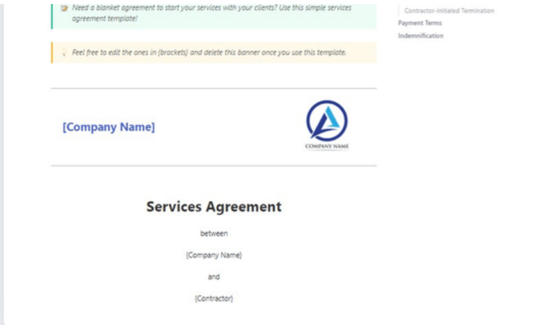
If your contract doesn't specify responsible parties and due dates for work, consider creating a Service Level Agreement. An SLA takes everything you've learned from the onboarding questionnaire and applies it to the contracted terms of your engagement with the customer.

If the contract is the What, explaining your future relationship, the SLA is the Who, When, and How.

For example, your contract lays out an agreement to provide a marketing strategy for a certain price. The SLA will define how that strategy will be created and delivered, including task owners, timelines, and specific responsibilities of team members.

This ensures both you and your clients are aligned on expectations and have accountability should any part of the agreement not go as planned in your client onboarding process.





Use this template for a blanket agreement to start your services with your clients faster

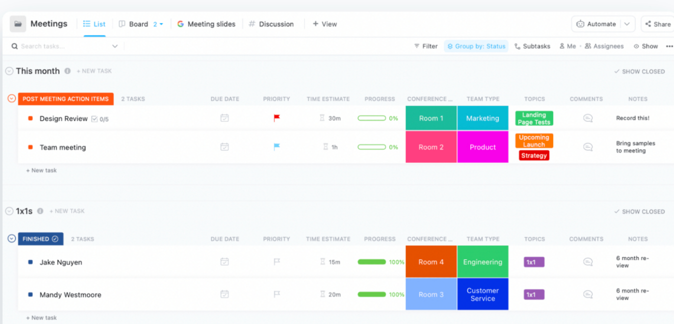
Download This Template

4. Host a project kickoff meeting

A kickoff meeting solidifies your working relationship. Sure, you may have spent some time getting to know each other prior to this, but your client onboarding process is your opportunity to define how you will function together. During this client onboarding call, you should:

- Introduce your team
- Determine how everyone prefers to communicate and receive the product or service, such as through Slack or email
- Establish project scope and goals
- Outline how you'll collaborate, including the cadence of deliveries and how you'll receive feedback
- Present your SLA
- Provide resources such as your team's contact information, project management tool access, and other things your new client needs to know

The kickoff call should reinforce expectations set during the contracting and client onboarding process so you start off on the right foot. This creates an opportunity to confirm both teams are aligned on the strategy and service goals before you start digging into projects.



Use ClickUp's Meeting Notes Template to organize and prioritize your meetings

Download This Template

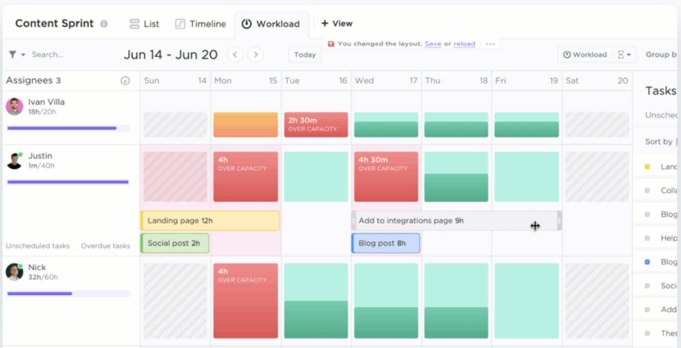
5. Schedule a post-kickoff internal meeting

The post-kickoff internal meeting is your opportunity to surface any takeaways from the kickoff call, work through foreseeable roadblocks, and answer questions. Just like the project kickoff meeting aligns your team with your client's, the post-kickoff internal meeting aligns your different internal teams on the project.

Your onboarding process doesn't have to be overwhelming. Instead, use this meeting to collaborate on strategies that will play to each team member's skills, brief your internal team on the SLA and project scope, and assign each task. This meeting should set internal expectations and roles so you can consistently and effectively deliver to your client.

For example, review the deliverables that will contribute to each part of the strategy. This will help your onboarding process by determining the internal point of contact will be for the account. Also, ask if there is any particular part of the strategy that specific team members are excited about or prefer.

The onboarding process should feel like a dual effort. Aligned team members with clear deliverables and expectations provide the best possible outcomes and transfer that energy to positive client experiences.



Use ClickUp's Workload View to see who is ahead or behind and easily drag-and-drop tasks to reallocate resources

The easiest way to align teams is through a centralized productivity platform, like ClickUp. Teams can easily collaborate on every aspect of a project—without ever needing to hop between tools and platforms.

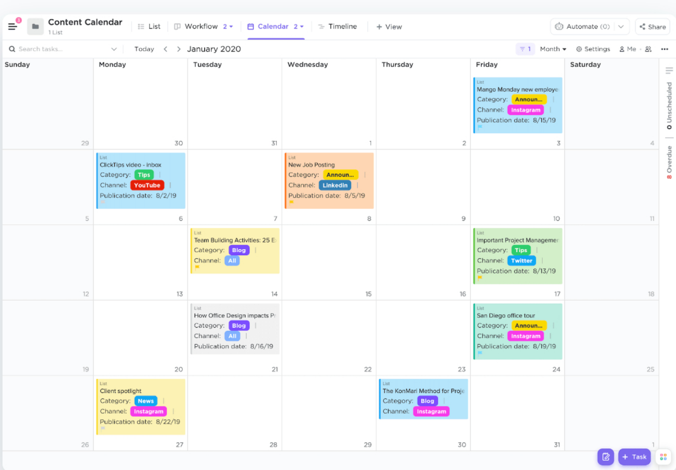
6. Plan routine follow-ups

Regular client communications are part of a healthy and productive relationship—especially in the client onboarding process. However, these communications need to serve a clear purpose; either to make your client's life easier or your project more valuable.

Scheduling regular monthly client meetings as part of your onboarding process will help your team address any concerns upfront as you work together.

In these meetings, update clients on strategy developments and report on service outcomes to reinforce the value you are delivering. This helps you stay top of mind for your clients, increasing referrals, providing more opportunities for upsells, and ultimately producing more profits.

Send a follow-up email summarizing what was discussed and action items for each team so the customer has a concrete takeaway from your meeting in the onboarding process.



Implement ClickUp's Content Calendar Template to quickly build your content strategy from the ground up

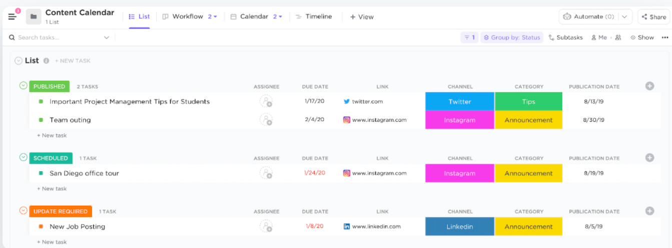
Download This Template

In addition to monthly meetings, provide weekly written updates via Slack, email, or the client's preferred channel. These updates should include planned project deliverables and any outstanding action items from the previous week.

For example, a content marketing firm might include the following items in its weekly update after the intial onboarding process:

- A list of social media and blog posts that you published for the client in the previous week
- What posts the client can expect to be delivered in the current week
- Outstanding content approvals you need from the client
- Proprietary data or subject matter experts you need access to for upcoming projects

These updates provide an opportunity to lean into customer questions and get ahead of any potential roadblocks for the coming week, as well as reinforce your value.



Easily view your content calendar in ClickUp's Table View

And, if you need even more transparency and communication between weekly check-ins and monthly meetings, use ClickUp's Table view feature to log client updates and connect tasks to them.

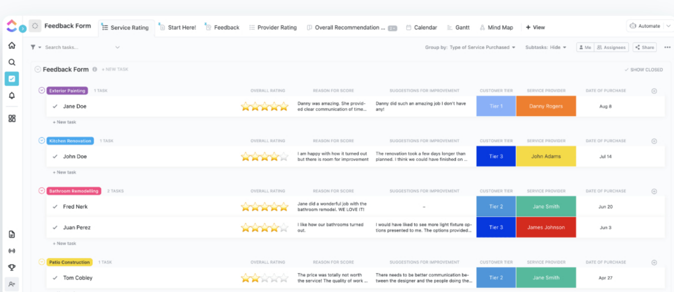
7. Optimize your onboarding experience

As companies scale, expect some gaps in the onboarding experience. It's essential to proactively identify these gaps and optimize accordingly. There are two steps to optimizing your onboarding; gathering feedback and collaborating internally to address the feedback.

Start by gathering new client feedback both formally and informally. A successful client onboarding process will ask clients in each follow-up meeting if they have any questions or concerns and note what types of questions are surfacing on a regular basis. Collect these notes in a collaborative space where your team can sort and analyze them at a later date.

Next, ask for direct feedback by sending out a new-customer onboarding experience questionnaire after each customer has completed onboarding (typically 120 days after signing). With ClickUp forms, you can easily turn survey responses into actionable tasks for your team to follow up on.

These two forms of feedback will help you uncover what your new client needs and where you're not meeting the mark in your existing customer success workflow.



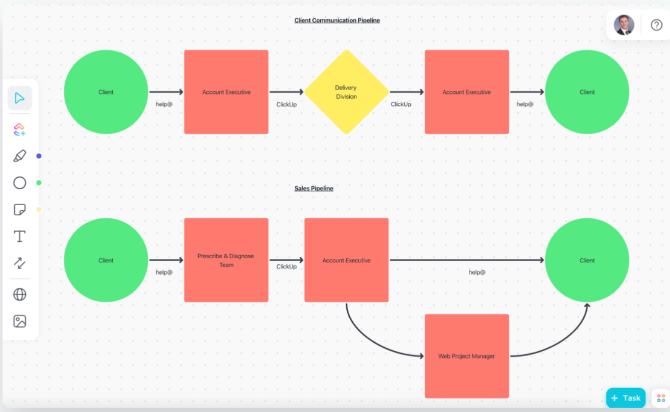
Use ClickUp's Customer Feedback Form Template to quickstart your information collection process

Download This Template

Don’t forget to collaborate internally

Client feedback will tell you where the breakdowns are happening, but now it’s up to your team to come up with a solution. The easiest way to do this is to collect the feedback responses from your new clients on a ClickUp Whiteboard.

Work collaboratively with your internal onboarding team to group responses and identify themes. Once themes are identified, think about where in the customer journey you can provide solutions to these gaps.



An example of Lewis Norwood’s Whiteboard for Pharmacy Mentor

Lewis Norwood, head of client relations at Pharmacy Mentor, explained how his team used ClickUp Whiteboards to successfully identify and solve client onboarding gaps.

“We literally talked through it, each stage of it we spoke about,” says Norwood. “By the end, we had agreement and alignment on the customer journey and even identified a big gap we never realized.”

ClickUp: Your Single Solution for Managing Client Onboarding

Imagine a world where you no longer have to toggle between multiple platforms for your CRM, project management, corresponding documents, and team communications. ClickUp makes that possible.

Effortlessly manage your clients, deliverables, and teams all in one place. ClickUp centralizes your entire workflow into one CRM and project management platform, from customer onboarding to project completion.

We believe the most effective client onboarding software and the sales process is one that works across teams and encompasses the entire client journey. ClickUp is built on the core concept of improving productivity for teams, which is why we made it fully customizable.

Because a platform that doesn’t work for your unique needs only hinders productivity. Experience freedom from context switching today and download our free customer onboarding template in ClickUp.

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