

BEST PRACTICES FOR A CUSTOMER ONBOARDING WELCOME PACKET



Introduction: Welcoming Your Customers and Guiding Them Through Onboarding

Your company's success isn't just about the products and services you provide. It's about the overall **experience** you provide for your customers. If they feel satisfied with your products and valued by your customer service team, they're likely to remain loyal clients for years. But if they feel ignored or don't get the materials and support they need to fully implement your product into their workflow, they'll probably leave.

How do you give your customers the experience and support that encourage them to stay with your company for years? It starts with your customer **onboarding process**.

Ask yourself: What kind of first impression do you make on your customers? How do they experience working with your company from Day One? Does the transition between the sales team and the onboarding team feel smooth?

All of these are critical questions to answer because they inform your understanding of retention and **churn**. A smooth, **efficient**, and effective onboarding experience allows your customers to reach full implementation faster — and ensures that they have the knowledge they need to actually use all the features of your product.

A slow, inefficient onboarding process has the opposite effect. Your customers spend months or even years waiting to start using your products, all the time feeling frustrated and worried that they'll never see a return on their investment.

You must guide your customer through onboarding and give them an outstanding experience that gains their trust and gets them to the go-live stage faster. How? Give them a welcome packet!

Develop a full suite of welcome materials, information, next steps, and pre-emptive troubleshooting details, and provide it to new customers early in the process. A well-designed welcome packet helps your customers feel valued and excited about the onboarding process.

Plus, it reduces the workload on your implementation team by eliminating the need for them to answer FAQs, manually send training materials, or waste time on repetitive tasks that can (and should!) be automated.

Are you ready to design your onboarding welcome packet? We've created this best practices guide for you!

Follow these steps to make sure your onboarding packet is functional, professional, and beneficial for your team and your customers.

Best Practices for Developing a Customer Onboarding Welcome Packet

- 1. Start Communication Right Away**
- 2. Understand Your Customer's Level of Knowledge**
- 3. Tell Your Customers What You Need From Them**
- 4. Bring All Stakeholders Into the Project**
- 5. Help Customers Understand Their Existing Process**
- 6. Provide Self-Serve Resources**
- 7. Offer an Approximate Timeline**
- 8. Optimize the Customer's Experience**
- 9. Personalize the Welcome Packet for Each Customer**

#1: Start Communication Right Away



One of the reasons it's so important to have a comprehensive welcome packet is that it allows you to start communicating with the client as soon as possible. That way, there's no gap in communication after the sales handoff. Here at GUIDEx, we send out our customer welcome packet within an hour of the contract signing.

So, what should the initial communication part of your welcome packet include? Here are some essentials:

- An outline of the next onboarding steps*
- A list of your customer's responsibilities (e.g., providing you with names and contact information for all of their team members who will be involved in onboarding)*
- Contact details for the correct points of contact in your organization*
- A welcome letter or video walk-through*
- Examples or screenshots of what to expect during onboarding (e.g., a task notification, the login process for your platform, how to direct message your team, etc.)*

Make sure your welcome packet includes specific instructions for communicating with your team, especially if you want your clients to use messaging features in your project management platform or onboarding software.

Your clients are more likely to stay engaged throughout the process when they know exactly how to reach you. So designate a specific mode of communication; it eliminates spurious emails and phone calls.

"The right information sent to the right people — that's one of the most important pieces I've found."

– **Cheyenne LaFrance**
Onboarding Manager, GUIDEx

#2: Understand Your Customer's Level of Knowledge

It's crucial to know how each customer is going to engage with the onboarding process. For example, if the customer's onboarding team is very familiar with **project management** tools, you probably don't need to spend as much time walking them through your onboarding platform.

However, if your customers aren't familiar with the implementation process or project management systems in general, you might want to customize the welcome packet for them so they feel confident right from the start.

Your sales team should be able to provide the onboarding team with a basic understanding of the processes the customer was previously utilizing. You can also get additional information during the kickoff call.

It's crucial to develop welcome materials that are accessible to everyone. Consider including resources for various learning styles (e.g., a video, a text-based guide, and a hands-on demo) so every member of the customer's implementation team can start getting up to speed right away.

Create a process for customizing the welcome materials based on what each client needs. You don't need to create everything from scratch each time. It's more efficient to develop a customizable template that you can modify when necessary.

"GUIDEcx offers...a project management system for anyone. You don't need to be a project manager to benefit from the software."

– **Justin Peticolas**

Manager of Implementation and Onboarding,
Groupize

Learn how Groupize reclaimed 10 days a month after implementing GUIDEcx

#3: Tell Your Customers What You Need From Them

Create a section in your welcome packet to tell your customers what you need from them: names and contact information for all of their stakeholders who will be involved in onboarding.

It's also a good idea to include a list of who should be involved; not all customers know this intrinsically:

- A team member who knows the customer's processes*
- The person or team in charge of training*
- The members of the customer's team who will be using your product*
- Someone from the IT team*
- Anyone who will be involved in testing during implementation*

Telling your customers exactly what you need from them reduces the chance that onboarding will be delayed because you're waiting on the client. Often, these missed deadlines happen because the customer isn't aware that they have tasks to complete. Give them the details about those tasks upfront; it will help them feel excited and empowered to get started.

"I like to make sure there is no delay, there is no stall-out, there is not one point where there is nothing they [the customer] need to do or that they don't know they need to do."

– **Cheyenne LaFrance**
Onboarding Manager, GUIDEcx

#4: Bring All Stakeholders Into the Project



Your welcome packet should include details about how the customer's team members will be added to the onboarding project and/or your product itself. You might even want to include a screenshot of the invitation email so customers know what to look for and don't miss messages because they think they're spam.

Give a quick explanation of how they'll be brought into the project (e.g., click the link in the invitation email to create an account, you'll see a dashboard that looks like this, find your assigned tasks here, etc.). Then, encourage them to set up their account as soon as possible and (if applicable) start experimenting with the product/platform.

"Our previous system also prevented us from taking on too many projects at one time. There were a lot of problems... The efficiency that we see from the GUIDEx software is incredible... Without this software, we couldn't do what we do."

– Austin Allen

Partner Implementation Supervisor,
MaidCentral

See how GUIDEx helped MaidCentral reduce their clients' onboarding tasks by 75%

#5: Help Customers Understand Their Existing Process

Your client chose to work with you because you have a product or service that can **help them run their business**. But before they can fully implement your product into their workflow, they (and you) need to truly understand how their current process works.

So use the welcome packet to encourage them to walk through their own process. They probably know the basics, of course, but the more information everyone has, the easier it is to implement your products in the most beneficial way.

At GUIDEx, we help our customers define every step of their current onboarding process. That way, we can help them get the most value out of our customer onboarding solution.

Our welcome packet includes a simple tool that customers can use to define their process. We also include detailed instructions on how to use that tool, so the client can get started as soon as they get the welcome packet.



#6: Provide Self-Serve Resources



A comprehensive welcome packet should also include resources and materials that your customers can access on their own. This “self-serve” approach offers several benefits:

- It encourages customer engagement*
- It allows customers to work on their own schedule, even outside of traditional business hours; assisting with helping to alleviate any pains due to multiple working time zones*
- It reduces the burden on your team members*
- It helps the rest of the onboarding process go more smoothly*

Think carefully about which materials to include in your welcome packet. Give your customers the critical resources they need, but don't overwhelm them with too much information. Providing too many resources can backfire and make them feel like your process is making their lives harder, not easier.

“I cannot imagine life without GUIDEx! It has worked out wonderfully.”

– Nancy Wilson
Implementation Manager, App-Garden

GUIDEx helped App-Garden cut meeting times by 86% with self-serve resources

#7: Offer an Approximate Timeline



Include an approximate timeline in your welcome packet. You don't want to commit to a firm go-live date, but it's important to give your customers a basic idea of what to expect. That means:

- An overview of the entire project*
- Designated milestones*
- A simplified view of tasks and dependencies*
- A general timeline of how long each step is expected to take*

Giving your clients this information up front helps instill trust and confidence while also giving them realistic expectations. They can see that you have a start-to-finish plan, and they know what to expect going forward.

Providing these details in the welcome packet sets the stage for a more productive kickoff call because your team won't have to spend time going over the project timeline in detail.

“Individual contributors can see the project and the plan. It helps our customers understand what their level of effort is going to be and the timeline of how long the onboarding process is going to take.”

– Paul Ventresca
Director of Implementations, Maxio

[Find out Maxio cut 6 weeks off their onboarding time with GUIDEcx](#)

#8: Optimize the Customer's Experience



One of the best ways to improve your onboarding process — and by extension, your welcome packet — is to understand how your customer experiences implementation.

As much as possible, try to put yourself in the customer's shoes and walk through the entire onboarding process. Look for points of confusion, bottlenecks, unclear dependencies, too much time allocated to completing a task, and anything that negatively impacts the customer experience. Then, address those issues pre-emptively.

Pay special attention to any parts of the onboarding process that are unclear, and clarify them in your welcome packet. Again, don't go overboard on information, but include enough context and details to eliminate common points of confusion.

"The new implementation has allowed me to be more productive with my clients rather than merely reactive. I can see everything they're doing, which allows me to be more involved in their onboarding process."

– Eric Serota

Senior Onboarding Specialist, Propertybase

See how GUIDEx facilitated a 60% productivity increase for Propertybase

#9: Personalize the Welcome Packet for Each Customer



Finally, customize the welcome packet for each of your clients. Incorporate their company name, logo, and colors. Include the (correctly spelled!) personal names of your points of contact. It might seem like a small thing, but these personalized touches make customers feel like they're seen and valued.

Another option is to slightly update some of the copy to include references to the customer's industry or pain points. Ask the sales team if they have any insights about aspects of your product that the customer was really excited about, and make a small reference to them.

Don't rewrite everything from scratch — that's inefficient and unnecessary. Just a few minor adjustments can make the welcome materials as meaningful as possible for every client.

"It makes that personal touch go a little bit further if you have their information in there. It's funny — every time a customer has had a kickoff call with me, they're like, 'Oh wow! It's our colors and our logo!' It's a huge feature."

– Cheyanne LaFrance
Onboarding Manager, GUIDEx

Give Your Customers an Exceptional Onboarding Experience

If you don't have an onboarding welcome packet yet, now's the perfect time to design one. Once you've developed a comprehensive template, all you need to do is personalize it for each new customer.

A well-designed welcome packet helps your customers feel valued and starts the onboarding process on the right track. Plus, having this resource in place reduces overhead for your onboarding team, increasing their capacity and setting the stage for scaling.

Follow this checklist to create an effective onboarding welcome packet:

- Create a template that can be personalized and sent quickly*
- Adjust the approach based on your customer's level of knowledge and learning style*
- Request the information you need to add the right people to the project*
- Tell the customer what to expect throughout the process*
- Offer self-serve resources and training materials*
- Integrate feedback systems so you can identify and address issues*
- Personalize the experience for each customer*

Developing an effective and enjoyable onboarding process is easier with GUIDEcx. Our customer onboarding solution incorporates crucial project management, communication, reporting, and customer satisfaction features to improve the onboarding experience for everyone involved.

To learn more about how GUIDEcx can take your organization to the next level, book a demo today or try GUIDEcx for Free!



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