

5 **Ways to Streamline the Customer Onboarding Process**

Introduction

One of the best ways to retain your customers is to invest in an effective onboarding process that gets them up to speed on your product or service quickly. That's because the sooner customers start to see success with your product, the more likely they are to integrate it into their routine and recommend it to others.

This translates to higher customer retention rates, customer health scores, NPS scores, and customer lifetime value.

For many organizations, however, customer onboarding can be complex, often requiring manual processes that are dependent on sales and service representatives.

That's problematic for two reasons: First, 74% of potential customers will switch to other solutions if the onboarding process is complicated.¹ Second, complex onboarding situations result in more calls and emails to your service centers from customers struggling to get started with your product.

In this guide, we'll walk through the following tactics to make onboarding smoother for customers and more efficient for your internal teams:



Simplify onboarding with step-by-step journeys that are specific to the customer or product you are supporting.



Streamline common business processes.



Automatically curate relevant content for different types of customers.



Send automated notifications that remind your customers to complete their onboarding.



Allow customers to add new members to their account independently.

¹ 11 Examples of the Best Onboarding Experiences in SaaS to Inspire Your Own

Take Onboarding to the Next Level with a Customer Portal

Although onboarding will vary for every organization, the goal should remain the same: to educate and equip customers with the information and resources they need to make the most out of your product or service as soon as possible.

However, onboarding is often complex for many organizations because:

- Different types of customers and products require unique onboarding experiences.
- Onboarding information and related resources reside in different systems, such as a knowledge base, digital asset management (DAM), community forum, product information management (PIM), learning management system, or other repository.
- Processes are varied and inconsistent and can include communicating with customers via email, scheduling training through a website, or setting up appointments with a customer success manager via phone.

Disconnected systems and processes are harder to manage for your internal teams, and it's probable that your customers find them confusing as well.

To make sense of all this, you need to re-design your overall onboarding experience with an “outside-in” approach that focuses on each step of the customer journey. Then, you can use digital technology to guide the user to the right resources, channels, and processes needed at each step. Used and designed correctly, a customer portal can play an important role in helping you with this “orchestration” of the experience.

Most companies, of course, already have a customer portal, but these portals are often designed to replicate a company's existing departments and processes using an “inside-out” perspective. Portals designed this way are usually just one of several channels the company uses to interact with customers (“For documentation, go to the Customer Portal; for support, go to our Ticketing Center,” etc.).

To be transformative, don't create yet another silo. Design a customer portal that weaves existing touchpoints together and curates resources intelligently to facilitate and accelerate the onboarding journey.

5 Steps to Streamlining the Onboarding Process with a Customer Portal

Customer onboarding is one of the biggest opportunities to use technology, such as a [digital experience platform \(DXP\)](#), to eliminate inefficiencies. Here are 5 steps you can take to enhance your onboarding process to make it easier for both your customers and employees to be successful:

1. Define customer-centric journeys

Customer onboarding processes can vary significantly depending on the product or customer you support.

For simple products, you might offer a digital, self-service only experience. More complex products may require a combination of digital and offline processes. For example, you could set up your portal to guide your customers through a digital training experience to address their immediate needs, and then give them the option to schedule a live training session for more advanced topics.

In addition, you might be serving users with differing roles, interests, and experience levels. Here are two examples of journeys you may want to differentiate to provide a tailored experience to your customer's unique needs and goals:

New Customer Journey

When you have a new customer, you might route them to a welcome page that confirms what they have purchased, gives them contact information for their rep, sets up a brief introductory call with that rep, and then leads them to the next steps you want them to take. These could include registering their product, watching a training video, or filling out additional information on a form that will help you personalize their experience even further the next time they log in to your site.

Existing Customer Journey

With existing customers, you can skip any introductory steps and go directly to a quick start guide or tutorial for their new purchase. If they're a long-time customer that's earned some loyalty status, you could present them with information on complementary products or services that could help them get more value out of the products they already own.

In summary, streamlining onboarding begins with evaluating what types of journeys make sense for your customers and configuring them in a way that eliminates confusion and unnecessary steps.

How a customer portal can support customer-centric journeys

As you've seen, the key to enhancing the onboarding experience starts with tailoring the journey to each type of customer you have. This requires a good mix of personalization, curation, and context-sensitive guidance.

Tailoring a personal experience for each customer manually would be cost-prohibitive. But if you build your customer portal on a DXP, you can quickly automate and scale customer-centric journeys.

Start with Segments

If you've done your customer-centric onboarding journey design homework, you've likely already defined groups of customers (and for B2B, the roles within each customer) that you'd like to support. A DXP can help you model these groups of customers using *segmentation capabilities*. Usually, such capabilities allow you either to define segments manually (by adding customers explicitly) or dynamically using firmographic data, profile data, purchased products, or other characteristics. Often, you'll also have the option of integrating with a third-party system of record (such as your CRM), which may already have user segment definitions.

Define Roles and Entitlements

As mentioned above, B2B customers often have several individuals belonging to an account who play different roles. For example, your customer may have a procurement officer, a sales representative, and a service technician, all of whom need different tools and resources for their onboarding experience.

You may also have to provide different levels of access permissions to perform different onboarding actions while also preventing access by unauthorized users. With a DXP that offers *role and entitlement capabilities*, you can define different levels of access for individual users. For example, you could restrict the ability to review and approve contracts to individuals with the procurement officer role.

Integrate Supporting Systems

In order to provide customers with access to the resources they need for their onboarding journey, you need to connect the various systems of record that house your onboarding assets. This is where a DXP with support for third-party systems integration can be invaluable. Using productized connectors, APIs, or integration tools, a DXP can connect to the content and learning management systems, knowledge bases, ticketing systems, and product catalogs that house resources useful to the onboarding experience.

Orchestrate the Right Experience for Each Customer or Role

Once you've defined segments, roles, and entitlements, you can use *journey-building functionality* within a DXP to define a sequence of steps each individual has to go through as part of their onboarding process. Part of that process could be designing an onboarding experience that requires sales reps to accept a privacy policy or take a required training. You may even need to design an onboarding experience where a manager has to sign off before moving the entire account to the next step.

Journey building is where you get to define all the steps and the order of those steps in a way that makes the most sense for each user segment you serve. Good journey-building functionality will allow you to orchestrate the resources and channels directly supported by your customer portal technology as well as third-party channels and resources, such as a YouTube video, an email, a phone call, or even a separate customer portal that lives on a different platform.

Panamax Shortens Onboarding and Increases Revenue 7x with Their Customer Portal

Panamax, a global leader in FinTech and telecommunication technologies, was able to build a one-stop shop for their customers with features like improved and accelerated onboarding workflow and automated account setup.

Learn more about how Panamax designed their user journeys through a customer portal [here](#).

2. Modernize common business processes with digital technology

Another opportunity to improve the onboarding experience for customers is to use digital technology to modernize individual business processes. Although some onboarding steps will need to continue as live interactions or offline actions, there are several common interactions where it is now acceptable and even preferred to complete them digitally. Here are some examples:

Contractual Matters

If onboarding requires legal signatures, most customers are happy to use electronic signature services. It's very common for contracts to go through a digital process that ensures all required signatures have been gathered and that everyone gets a copy of the signed agreement. As part of your onboarding modernization, you may want to route signed PDFs to the appropriate personalized area in your customer's account profile.

Online Verification

Digital technology makes it possible to verify information online to onboard your customers faster. For example, a financial services institution can automate its KYC (Know-Your-Customer) process by allowing customers to submit their documents digitally through their portal, using software to screen and validate the documents before allowing a user to create an account. Similarly, a lender can instantly verify a customer's credit without requiring them to come to a local branch office.

Communication

A customer portal can be easily configured to help you streamline communication tasks, such as automatically sending out welcome or follow-up emails that remind your customers of where they are in the onboarding journey. Customer portals can also provide valuable insights on who opened the emails and what they did next, which can help you gauge the success of your communication efforts.

Instead of using simple notifications to nudge customers forward, you could also “gamify” the onboarding experience by encouraging users to complete specific onboarding tasks to achieve a specific status or unlock rewards. This approach is common when you want customers to complete an online training course as part of their onboarding experience.

Scheduling Appointments and Training

By providing online access to an online calendar, a customer portal can make it easier for your customers to schedule training events or appointments with your team on their own as well as set up reminders and quickly modify or cancel scheduled events as needed.

Ultimately, streamlining business processes not only empowers customers with more convenient ways to finish tasks but also helps remove those mundane and time-consuming tasks from your service teams' queue so they can focus on higher-value interactions.

3. Curate content specific to your customers' needs

Once you've integrated with the different systems that hold the assets associated with your onboarding process, you can use segments, personalization, and journey-building functionality to curate those assets according to specific customer segments and present them to customers at the right moment in their onboarding.

For a new customer, you might first present them with a welcome message and contact information for their account manager. Next, you could lead them to a getting started video with accompanying documentation for their product. Depending on whether they

engage with the written or video content, subsequent steps beyond “getting started” could present more of the type of content they prefer. New customers, of course, should be given the option to register their product to take advantage of support and warranty services. Lastly, you can end the journey with a page displaying all related documentation for their product and related advanced training courses.

As noted earlier, these assets may come from within your portal or from any number of external systems you’ve integrated with.

If your customer is an organization with several users, you could also define onboarding journeys that present individual users with different types of content or options based on their role. Technical users responsible for implementing or operating the product or service would receive curated technical resources for installation or configuration. Business users would get information on how to use the product or service. In addition, managers might have the option of adding more members of their team to the account who need to be onboarded as well.

By curating onboarding resources by role, you help ensure your customers get to value with your product or service faster.

Broadcom’s Portal Provides Customers with Curated Content Through Personalized Dashboards

Broadcom’s portal allows customers to access anything they need by simply logging in – the portal then automatically grants them access to everything they’re entitled to use and see.

Dashboards and product pages provide customers with access to specific education, documentation, licensing, and software downloads for the products they’ve purchased.

Learn more about Broadcom’s customer portal [here](#).

4. Use metrics to monitor completion and diagnose issues

Even if you provide a great onboarding experience, it’s easy for your customers to get distracted with other business priorities. That’s why it’s important to know where your customers are in the onboarding process and nudge them forward if they need a reminder.

Reporting within your portal can help you see exactly where your customers are in their onboarding experience. For example, an aggregate report can display a view of how many customers have completed their onboarding and group other customers into categories based on their completion percentage.

Depending on the completion percentage, you could set up auto-trigger notifications to remind your customers about the next steps they need to take to successfully complete their onboarding. And for customers who appear stuck, you could drill down into the report to generate a list of customers for your service teams to follow up with personally.

Your customer portal can also provide analytics in one place so you can quickly access performance metrics and plan improvements for your onboarding process.

5. Allow dealers, distributors, agents, or partners to manage accounts on behalf of end customers

Many companies rely on dealers, distributors, agents, or partners to deliver their products and services to end customers. This can be seen, for example, in the insurance industry, where agents sell policies on behalf of insurers; or in heavy manufacturing, where end customers might purchase farm or factory equipment from independent dealers.

In these scenarios, companies often also want to delegate management of the customer experience to those third parties. Insurance agents, for example, provide customer service representatives that can make policy changes or update personal information.

A modern customer portal can be designed to support and modernize several aspects of this model:

- **Support the onboarding of new dealers (or agents, etc.):** Companies can apply the same principles for improved onboarding of end customers to the onboarding experience of their dealers.
- **Allow dealers to add and onboard their employees:** Companies can delegate dealers the ability to manage their accounts and associated team members. This includes adding new members and assigning them to onboarding processes that train them to provide good service to end customers.
- **Empower dealers to work on behalf of end customers:** In these dealer-supported models, oftentimes the end customer doesn't have access to technology or prefers to rely on offline interactions. Dealers can be given proper entitlements to create, update, and manage accounts for end customers. This makes it easier for dealers to manually onboard non-tech savvy end customers as needed.

Putzmeister Leverages Granular Permissions Management to Personalize User Journeys

Putzmeister, one of the global market leaders in construction and underground engineering, built a dealer and customer portal that offers users personalized content and data based on their permissions.

Granular segmentation capabilities enable both audiences to find the correct information faster and ensure they can only access relevant content, data, apps, and services.

Learn more about Putzmeister's new solution [here](#).

Maximizing Your Customer Portal for Customers and Employees

Customer portals can be powerful tools to educate and equip your customers to better leverage your products and services. But if your current solution can't adapt to help your customers be successful, consider leveraging a more capable platform that delivers out-of-the-box features to accelerate time-to-market and flexibility to customize those solutions according to your needs: Liferay.

Liferay provides a single, unified platform that empowers you to tailor the solutions your customers need without sacrificing budget, time, or flexibility. With native analytics, content, commerce, and cloud capabilities, Liferay makes it easy to build and connect multiple solutions, like customer portals, intranets, websites, and more.

Liferay's extensions architecture and portal heritage make it well-suited for sophisticated B2B and B2E use cases that require challenging integrations and custom development.

With Liferay, you can build a customer portal that is tailored to fit customer needs and streamlined for internal operations. See how you can begin using Liferay to build a customer portal that is able to do more [here](#).

Contact our team at liferay.com/contact-sales to learn more.



Liferay helps organizations build for the future by enabling them to create, manage, and scale powerful solutions on the world's most flexible Digital Experience Platform (DXP). Trusted globally by over a thousand companies spanning multiple industries, Liferay's open-source DXP facilitates the development of marketing and commerce websites, customer portals, intranets, and more. Learn how we can use technology to change the world together at liferay.com.

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