



# Onboarding Trends in Customer Success

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This survey is designed to assess how Customer Success organizations perform the motions of customer onboarding to provide insights into industry practices, challenges, and potential areas for improvement in customer onboarding strategies.

**Customer Onboarding** - Customer onboarding is the first step in a customer journey with your company's technology or service. The process is designed to help them quickly and effectively achieve initial value and become successful users. Onboarding can be an ongoing process that evolves as customers expand their use of your products and services, adopt new features, or as the members of their team change. This continuous support ensures they continue to find value and deepen their relationship with your company.

**The last day to participate is November 1st, 2024.**

**All participants will receive the full survey results and Survey Insight reports highlighting the top industry insights.**

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## Company Profile

### 1. Which of the following best describes your company?

Select only one.

- ☐ On-Premise Software
- ☐ Hardware / Equipment Manufacturer
- ☐ Technology Services Provider (non-manufacturer)
- ☐ XaaS Provider (i.e. SaaS, PaaS, IaaS, etc.)

**2. What is your company's TOTAL annual revenue in US dollars for your most recent fiscal year?**

- ☐ Less than \$100 Million
- ☐ \$100 Million to \$500 Million
- ☐ \$500 Million to \$1 Billion
- ☐ More than \$1 Billion

**3. How would you describe the complexity of the products/solutions that your company sells?**

**Standard:** general consumer, business applications – requires product proficiency to manage and clients drive adoption

**Moderate:** increasingly complex products running in a variety of environments – requires more mature consulting skills to manage clients and drive adoption

**High:** complex/custom application and operating environment – requires a high degree of business acumen to manage clients and drive adoption

- ☐ Standard
- ☐ Moderate
- ☐ High

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## **Onboarding Basics**

**4. Who has the primary responsibility at your organization for customer onboarding?**

- ☐ Dedicated Onboarding Team
- ☐ Customer Success Managers
- ☐ Professional Services/Consulting
- ☐ Customer Support
- ☐ Partners

**5. Is successful customer onboarding tied to employee performance or incentives?**

☐ Yes

☐ No

**6. What is your organization's primary goal for customer onboarding?**

☐ Drive product adoption

☐ Reduce time-to-value (TTV)

☐ Improve customer satisfaction

☐ Increase customer retention

**7. How would you categorize your organization's customer onboarding process?**

☐ Standard and repeatable

☐ Customized (not repeatable)

**8. Do you segment your customers for different onboarding experiences?**

☐ Yes

☐ No

**Logic: Only answer if Question 8. "Do you segment your customers for different onboarding experiences?" is one of the following answers ("Yes")**

**8a. What criteria do you use for onboarding segmentation?**

Select all that apply.

☐ Touch (e.g., High touch, Medium touch, Low touch, Digital touch)

☐ Industry (e.g., Healthcare, Finance, Technology)

☐ Product/plan purchased (e.g., Basic, Premium, Enterprise)

☐ Customer Maturity (e.g., Beginner, Intermediate, Advanced)

☐ Past experience with similar products (e.g., First-time users, Experienced users)

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## Onboarding Practices

### 9. How do you provide onboarding documentation to your customers?

Select all that apply.

☐ Formal training program for administrators

☐ Formal training program for end users

☐ In-application guidance

☐ Self-guided via Knowledge Base

☐ Video Tutorials

### 10. Are you able to track the progress of your customers throughout the entire onboarding process?

☐ Yes

☐ No

### 11. What is the average duration of your customer onboarding?

☐ 1 week or less

☐ 1 - 2 weeks

☐ 2 - 4 weeks

☐ 1 - 3 months

☐ Longer than 3 months

## 12. How does your organization measure the success of your onboarding process?

Select all that apply.

- ☐ Onboarding completion rate
- ☐ Customer Time-to-value (TTV)
- ☐ Product usage data
- ☐ Customer surveys
- ☐ Customer retention rate

**Logic: Only answer if Question 12. "How does your organization measure the success of your onboarding process?" is one of the following answers ("Customer Time-to-value (TTV)")**

## 13. How does your organization measure the first time-to-value (TTV) for your customers?

Select all that apply.

- ☐ Onboarding milestones
- ☐ Time to go-live
- ☐ Consumption threshold (i.e. completion rate, x% of daily users, key feature usage)
- ☐ First-time expansion (i.e. time to first upgrade)
- ☐ Value achievement (i.e. business outcomes, adoption telemetry)

**Logic: Only answer if Question 12. "How does your organization measure the success of your onboarding process?" is one of the following answers ("Customer surveys")**

## 14. How does your organization measure onboarding satisfaction?

Select all that apply.

- ☐ Net Promoter Score (NPS)
- ☐ Customer Satisfaction (CSAT)
- ☐ Customer Effort Score (CES)

**Logic: Only answer if Question 14. "How does your organization measure onboarding satisfaction?" is one of the following answers ("Net Promoter Score (NPS)")**

**14a. What is your organization's Transactional Net Promoter Score (NPS) for customer onboarding?**

The range can be as low as -100 and as high as +100.

\_\_\_\_\_Net Promoter Score (NPS)

**Logic: Only answer if Question 14. "How does your organization measure onboarding satisfaction?" is one of the following answers ("Customer Satisfaction (CSAT)")**

**14b. What is your organization's Transactional Customer Satisfaction (CSAT) score for customer onboarding?**

Normalize your answer to a 1-5 scale, with 5 being the highest score.

\_\_\_\_\_Customer Satisfaction (CSAT)

**Logic: Only answer if Question 14. "How does your organization measure onboarding satisfaction?" is one of the following answers ("Customer Effort Score (CES)")**

**14c. What is your organization's Transactional Customer Effort Score (CES) for customer onboarding?**

The industry standard range is 7, with 7 being the highest score and choices ranging from Strongly Agree to Strongly Disagree.

\_\_\_\_\_Customer Effort Score (CES)

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## Onboarding Optimization

### 15. Which of the following are the biggest challenges your customers face during the onboarding process?

Select all that apply.

- ☐ Lack of time/resources dedicated to onboarding
- ☐ Customers fail to complete key onboarding steps
- ☐ Onboarding materials and supporting aids are confusing or difficult to use
- ☐ Lack of support from leadership/management within the customer's organization
- ☐ Lack of clarity and direction regarding the onboarding process

### 16. Which of the following are the biggest challenges internally with the customer onboarding process?

Select all that apply.

- ☐ Getting customers to engage with onboarding materials
- ☐ Ensuring customers complete onboarding tasks
- ☐ Measuring the effectiveness of onboarding
- ☐ Scaling the onboarding process
- ☐ Personalizing the onboarding process

### 17. What percentage of end-user onboarding engagement is automated?

- ☐ 0%
- ☐ 1% - 25%
- ☐ 26% - 50%
- ☐ 51% - 75%
- ☐ 76% - 99%
- ☐ 100%

**18. Does your organization use artificial intelligence (AI) capabilities to enhance the onboarding process for your customers?**

☐ Yes

☐ No

**Logic: Only answer if Question 18. "Does your organization use artificial intelligence (AI) capabilities to enhance the onboarding process for your customers?" is one of the following answers ("Yes")**

**18a. How is your organization using AI in the onboarding process?**

Select all that apply.

☐ Scheduling onboarding (e.g., scheduling meetings, automated check ins)

☐ Content development (e.g., multi-lingual support, content optimization)

☐ Interactive guidance (e.g., AI powered walkthroughs, personalized recommendations)

☐ Support (e.g., chatbot, online agent)

☐ Automating VoC Surveys

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## Key Metrics

**19. What is your company's reported Dollar Retention Rate (DRR)?**

Use most recently completed fiscal year on a rolling 12-month period.

**Dollar Retention Rate** = [(Annual Booked Dollars Renewed) DIVIDED BY (Annual Order Value Available to Renew)] X 100. Retention Rate is defined as the total available renewable revenue you were able to achieve after an

\_\_\_\_\_Dollar Retention Rate

**20. What is your company's reported Expansion Rate?**

The Expansion Rate is the total rate at which you are increasing the spending of retained or existing customers.

**Expansion Rate** = [(Upsell + Cross Sell) DIVIDED BY (Starting Annual Recurring Revenue Available to Renew)] X 100

\_\_\_\_\_Expansion Rate

**21. What is your company's average corporate Net Promoter Score (NPS)?**

The range can be as low as -100 and as high as +100.

\_\_\_\_\_Corporate Net Promoter Score (NPS)

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**Thank you for your participation!**

**We look forward to sharing the results soon.**

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