9 Client Onboarding Best Practices to Boost Retention

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No business ever wants to lose clients, but it happens. Sometimes, it occurs soon after a client signs up for your service. If you've ever had a new client cancel before fully experiencing what you have to offer, your onboarding process could have played a part.

A smooth client onboarding process can help prevent early churn and create lasting customer relationships. Below, we provide onboarding tips to help turn your new clients into satisfied, loyal customers.

Why is Client Onboarding so Important?

Your onboarding process sets the foundation for your service. It shows clients what it will be like to work with you and ensures you and the client are on the same page. This is the time when you fully learn your customer, understand their goals and needs, and show them early on that choosing your company was the right decision.

A strong onboarding experience also demonstrates the level of support clients can expect from your business. In fact, nearly 63% of customers consider the quality of expected support when deciding whether to use a company's service. This means showcasing your onboarding process during the sales cycle isn't just helpful—it's essential for winning new business.

By communicating your structured approach upfront, you reassure prospects they'll be taken care of, helping to build trust early and increase your conversion rates.

Best Practices for New Client Onboarding

So, what makes a good onboarding experience? Here are nine effective ways to onboard new clients so they'll stick around for the long haul.

1. Ensure You're The Right Fit

Every client relationship starts before the contract is signed. So, before your client inks the deal, you need to do some pre-onboarding to be certain you're the right one for the job. Your sales reps should be learning the pain points and goals of potential clients to ensure your company can actually provide what the client needs.

You don't want to be so determined to bring in business that you take on a project that's too much for you. Failed expectations can quickly lead to dissatisfied clients who churn before they've even gotten started.

2. Use an Onboarding Checklist or Guide

Consistency is a huge contributor to success. Having a checklist or official guide for staff to follow ensures a consistent onboarding experience. If your team isn't sure who does what after bringing on a new client, it can lead to delayed work and neglected customers.

This is a surefire way to send your client running to a competitor. Therefore, keep a checklist in place so your staff knows how to move new clients along.

3. Send a Welcome Email

When you sign up for a new internet plan, the service provider sends an email within the first week welcoming you to their business. The email provides links to online support, special offers, and more. Your company needs to follow the same approach.

Sending a welcome email makes a customer feel appreciated and helps them build trust in your company. It's also a great opportunity to provide resources to get your client started, like video tutorials or links to FAQs. Providing this information early on can also reduce support calls, since you've taken the initiative to answer common questions from the start.

4. Don't Skip a Kickoff Call

The kickoff call is a crucial part of the onboarding process where you and the customer ensure you both are aligned. Depending on your business, the kickoff call can be a brief phone call to touch base or a more detailed video chat with all the team members who will be working with your new client.

The kickoff call should cover tasks including:

- Completing or reviewing your client's content brief
- Establishing the client's goals
- Learning who the client's official point of contact is
- Introducing the client to the account manager and team they'll be working with
- Determining how often you'll check in

A well-executed kickoff call can leave a great first impression on your client, so don't skip it.

5. Establish Metrics Early

Success does not look the same for every client. So, it's vital to determine early on what your client considers a good outcome. For example:

- **SEO Clients:** Clients with new websites may prioritize impressions and clicks, while those with an established site may care more about increasing conversions and engagement time.
- **Project Management Clients:** Success could mean faster task completion rates, more balanced workloads across team members, or increased collaboration (measured by comments and updates).
- **E-Commerce Clients:** For these clients, their key metrics could include increased purchases within specific product categories, more repeat purchases, or reduced cart abandonment rates.

By defining the most important metrics upfront, you create a shared understanding of what success looks like. This makes it easier to demonstrate ROI, strengthen your client's trust, and keep them engaged long-term.

6. Follow Up Regularly

Poor communication is a common factor in client churn. Regular contact with your clients shows you value your customers and care about their success, helping to strengthen relationships and build customer loyalty.

For some clients, a monthly email is enough. Others may want regular video calls to discuss metrics and ask questions. The last thing you want is a client to churn because they felt abandoned or couldn't fully grasp how to use your service.

Check in at least monthly to review reports, answer questions, and resolve any service issues your client may have. Make it easy for clients to reach out to you too.

7. Provide a Personal Touch

No client wants to receive generic emails. In fact, 52% of customers are likely to switch to your competitor if you don't provide personalized communication with them. Tailor communications to each client to keep them better engaged and feeling like they truly matter to your company.

8. Be Open to Client Feedback

Clients like to feel heard. A 2023 study from Ruder Finn revealed that nearly 50% of consumers want companies to request feedback.

Send your clients surveys at key milestones, and incorporate useful suggestions. Doing so can prevent future clients from having the same issues.

It also shows clients that you're listening to their concerns and taking steps to ensure their satisfaction. Practicing this type of customer service can increase client retention and build brand loyalty.

9. Use Onboarding Software

If you're a larger company or provide a complex service, using automation software can streamline the onboarding process. For instance, you can set up the software to automatically send out client emails.

Onboarding software also enables personalization by collecting client data throughout the process. This allows you to tailor communications based on each client's specific needs, send follow-ups at optimal timing for their unique journey, and personalize messaging with details like their name and company information.

Turn Your New Clients Into Long-Lasting Customers

Your early client interactions are crucial for leaving a good impression and gaining your client's trust. With the right onboarding process in place, you'll increase customer satisfaction, reduce early churn, and improve client retention. Start implementing these practices today, and watch your client relationships transform from one-time transactions into profitable, long-term partnerships.