

Sample Onboarding Campaign

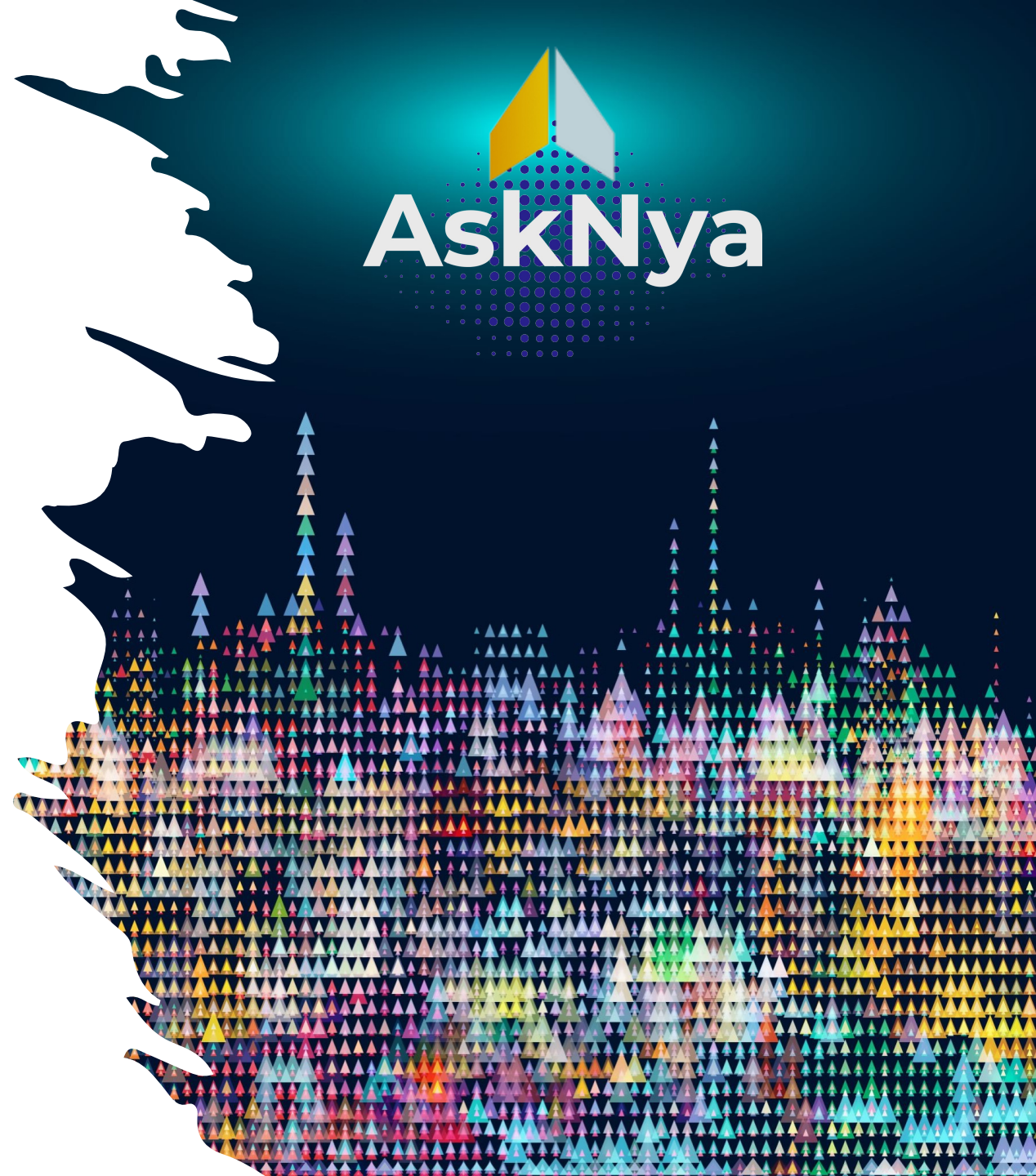
September 2022



What is an onboarding campaign?

An onboarding campaign is a useful tool to help potential customers know how to use your product or service. By enabling your customer, you create an empowered audience who can potentially self-serve and limit the need for customer success tickets. Some of the advantages of an onboarding campaign include:

- Enhanced user experience
- Reduced reliance on customer success department
- Increased ability for users to leverage automated tools



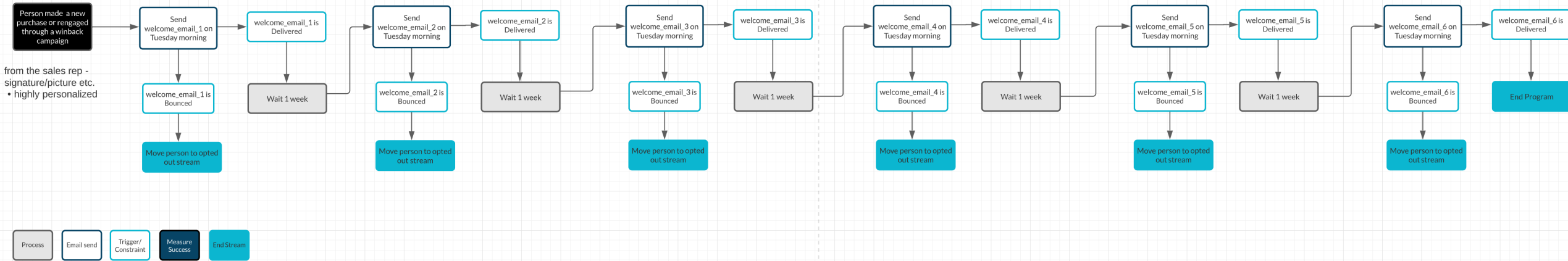


Items Needed

1. Data and list availability for confirmation of purchase
2. Details of how to use product and/or service
3. Email content for at least 3 emails including:
 - Congratulations on their purchase
 - Tips and tricks
 - Next Steps
4. What is the cadence you desire?



Sample Flow





Sample Content Ideas

	Email #1	Email #2b	Email #3b	Email #4	Email #4b
Timing and/or Cadence	Ideal: Within 24 hours of purchase Possible: Within 7 days of purchase	Day 21 (after email #1)	Day 27 (after email #1)	Day 41 (after email #1)	Day 41 (after email #1)
Main Point/Message	Welcome to the Family	Ways to optimize your product	Do You need help with your enrollment?	Congrats on using successfully	Seems like you might need help – give us a call
Content Suggestions	<p>We are so excited to introduce you to all our products have to offer.</p> <p>Everything you need to know Onboarding & Rostering Directions</p> <ul style="list-style-type: none"> • Getting Started Guides • Initial Placement information • Your Customer Success Manager <p>We look forward to helping you in the coming weeks get the most out of your product as possible. You will be receiving a series of emails to help you on your path.</p>	<p>Oh No! It looks like you are taking a little longer to get your product running.</p> <p>Follow these directions to get your product configured today!</p> <p>If you need additional help reach out to your Customer Success Representative who is standing by ready to assist.</p>	<p>We see that you have your successfully enrolled in our configuration program.</p> <p>You can find step by step instructions here.</p> <p>If you need a little more help; feel free to reach out to your success partner.</p>	<p>We are so excited that you are all set up for a successful year with your new product.</p> <p>Remember that we are here every step of the way to help you.</p> <p>If you need technical support – reach out to (Tech Support)</p> <p>If you need customer service – reach out to (Cust Success)</p> <p>For 100's of pieces of free content that you can use in your school today; check out HMHco.com</p> <p>And finally – if you want to know about other, complimentary products; our experts are waiting for your call.</p>	<p>Uh oh – We see that you are all set up; however, haven't recorded any usage.</p> <p>We know that successful implementation within the first 90 days is key to your success.</p> <p>Let us help you get set up and ready to roll. Give your Customer Success Manager a call today and let us help you!</p>
CTA	Main CTA: To landing page with all of the information In copy CTA: Link to part of page with the correct information.	CTA: Get Ready to Configure	Primary: Landing page with instructions Secondary CTA: Contact your success partner	Main CTA – Let's set you up for more success.	Call Customer Success
Target Audience	All new owners of particular products	All new owners of products who have not set up their system	All new owners of particular products who have not configured their system	All new owners who have started using the system successfully	All new owners who haven't started using the product.

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