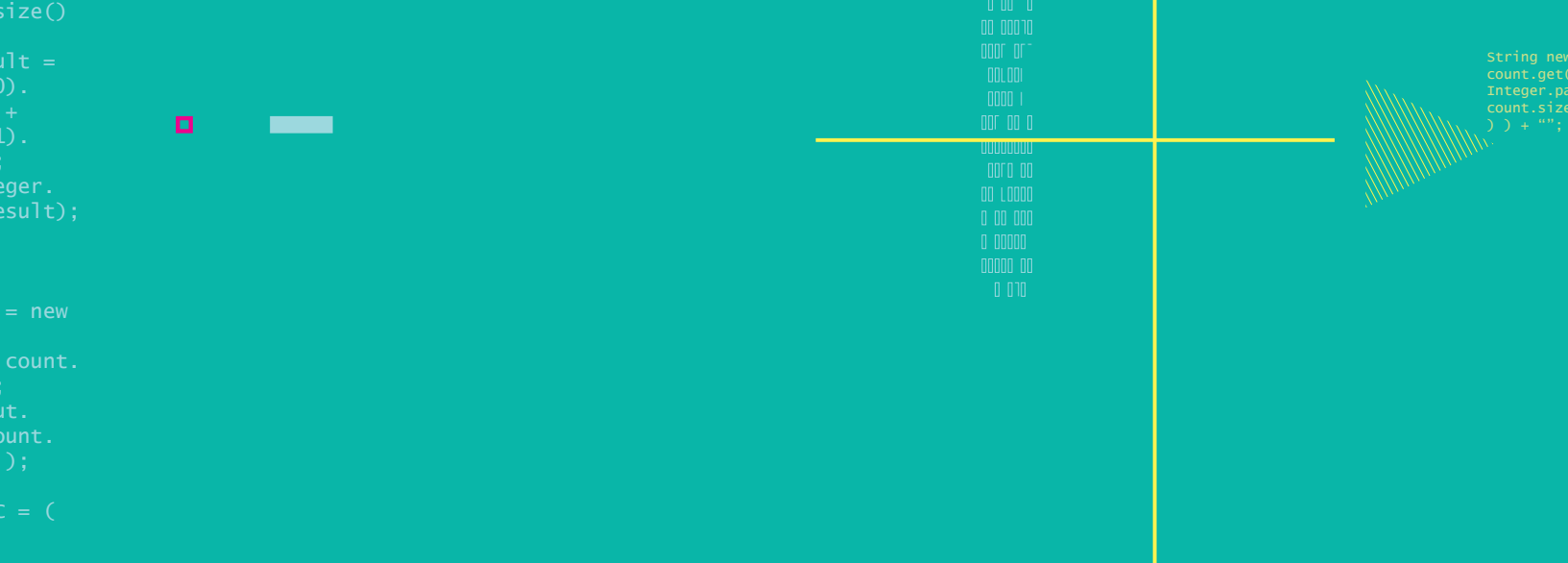



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}  
}  
if( (size*2) != count.size()  
sub.add( count.get(size) );  
  
count = new Vector();  
count = sub;  
//System.out.println( count  
}while( count.size() != 2 )  
  
String result = count.get(0  
toString() + count.get(1).  
toString();  
return Integer.parseInt(res
```

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Section 1:

The importance of post-sale marketing activity in tech

For B2B tech marketers, after-sale activity is as critical as pre-sale.

Not only is it crucial for you to communicate the value of your technology, but you must also educate and train your users to a point where they are quickly reaping the benefits of the technology they've invested in.

New customers who don't adopt and use your product or service in the post-sale window are:

- › Less likely to go on to use it at all
- › Less likely to upgrade features
- › Less likely to upgrade users
- › Less likely to recommend internally and externally
- › More likely to cancel or lapse.

In short, if you don't get your new customers on board quickly, the value you'll get from them at any proceeding point will rapidly diminish.

"65% of a company's business comes from existing customers, and it costs five times as much to attract a new customer than to keep an existing one satisfied"

Gartner



Section 2:

What it means for your marketing team

Around 40-60% of software users will open an app once and never log in again. The post-sale stage of the customer lifecycle is the marketing team's most crucial window of opportunity to:

- › Demonstrate value
- › Enable the customer to demonstrate value
- › Establish customer usage patterns and behaviors
- › Focus on your competitive advantage
- › Encourage new customer advocacy.

So the customer benefits of enhancing the post-sale stage of the customer lifecycle are clear.

But what elements of this stage of the customer journey should marketers focus on?

- › Technology deployment/activation
- › Onboarding
- › Training
- › Success achievement
- › Usage driving
- › Advocacy.

Objectives

Just like your pre-sale marketing activity, the objectives for post-sale should be built into your onboarding plan from the outset.

You should be aiming to make the post-sale experience and customer journey as fruitful as possible by creating a clear adoption plan, enabling swift deployment and integration, and helping to drive rapid and consistent usage and success.

Here are the five key areas you should consider when setting your objectives:

1. Make it as easy as possible for new customers to use your product.
2. Make it as easy as possible for new customers to recognize the value they get from using your product.
3. Help your customers to succeed with your product as soon as possible.
4. Make your USP stand out.
5. Make it easy for new users to share their positive experience.

Section 3:

The questions you need to answer

1. What is your new customer activation rate?

It's a given that you're already tracking conversion rates. You're probably highly focused on your 'website visit to trial sign-up' conversion rates. And you probably track closely your 'trial to purchase' conversion rates.

But what percentage of buyers go on to become active users? This is your activation rate and it's a crucial metric you need to have locked down.

To define your new customer activation rate, you'll need to first have a clear definition of what an active customer actually is. This may be frequency or volume of activity, for example.

It's crucial here to ensure your marketing team has access to the analytics or user data it needs.

You'll need to know your current new customer activation rate and you'll need to set a target rate.

2. What are your new customers' expectations?

Before you can deliver on your customers' needs, you should be clear about what their expectations are:

- › What do your customers perceive they have bought?
- › What do they expect to be able to do with your platform/service?
- › How quickly do they think they're going to get there?

Customer surveys

Incentivized customer surveys across multiple media – online, postal and telephone – are an important tool in gathering the insight you need.

Focus groups

A deeper dive than a customer survey, focus groups will enable you to really get under the skin of your customers and formulate hypotheses around their needs that can be tested through wider customer surveys as a follow-up.

Your sales team

Speak to the people at the coal-face: your sales team. They may have the clearest understanding of your customers' expectations, and the benefits your customers are signing up to.

Your support team

Your first line support team may know better than anyone what your customers' main issues and expectations are during the new user window. Speak to them.

3. How do you define a successful customer?

Achieving success in a short time is crucial for new customers. But what does that success look like?

- › Will a successful new customer have completed a set number of tasks using your product?
- › Will they have completed a particular key task?
- › Will they have delivered a set ROI against their total spend with you in the first month?

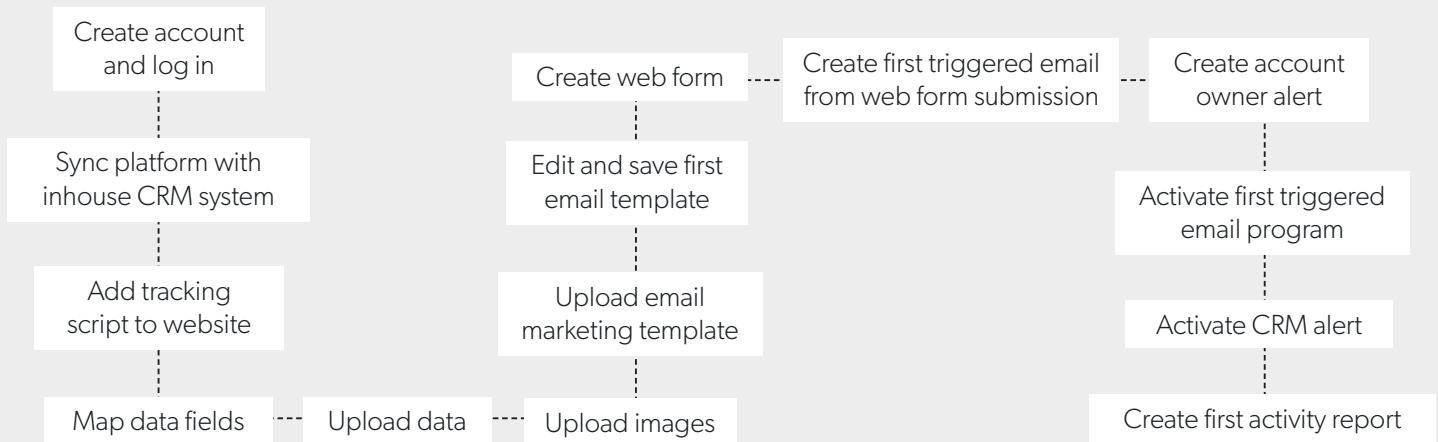
4. What is the customer success roadmap?

This is the step-by-step journey the customer takes to achieving the success or successes you have identified in your answers to question three.

Example customer journey (for a marketing automation platform)

Success milestone: Activate and report on a simple triggered email program based on a web form completion.

The journey:



```
}
}
if( (size*2) != count.size() )
sub.add( count.get(size) );

count = new Vector();
count = sub;
//System.out.println( count );
}while( count.size() != 2 );

String result = count.get(0).
toString() + count.get(1).
toString();
return Integer.parseInt(result);
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Section 4: KPIs and red flags

Once you have clear answers to the four questions covered in the previous section, you'll be in a position to define your onboarding program KPIs. These could be one of or a combination of metrics around customer behavior-related indicators, such as:

- **Task completion (milestone tasks)**

If you've established the answers to questions three and four in the preceding section, you'll be able to define the milestone tasks you want your new customers to complete, and by when.

- **Feature usage**

What are the key features of your product that you need your customer to be using in order for their expectations to be met, and/or for them to achieve success?

Which is the feature that delivers on your brand promise and your sales/marketing pitch?

Which is the feature that delivers ROI or the highest customer feel-good factor?

Defining these KPI features and tracking new customer usage of them can be central to your onboarding objectives.

- **Reporting usage**

Enabling your new customers to identify, measure and report on the successes they achieve through using your product can also be a critical element in your onboarding process. Once customers can easily see and share the news of their success, half your battle is won.

- **Session time**

Session time may provide a compelling metric for how engaged a new customer is with your product.

- **Usage frequency**

Usage frequency data over particular timeframes, such as average time spent in the platform in the last day, week or month, can provide a crucial benchmark for new customer engagement.

Activation and onboarding journey planning

Once you've mapped your new customer's 'success journey', you need to plan out the activation and onboarding process. The activation and onboarding flow is the end-to-end process that you as a supplier take to enable the customer to achieve success as smoothly and quickly as possible.

Example onboarding journey:

	Technology deployment/activation	Onboarding	Training
Day 1	Activation of user account		
Day 2	Delivery of all API-related support documents		
Day 3		Delivery of user support and training materials	
Day 4		Delivery of social proof	
Day 5	Whitelabelling/branding of UI complete		
Day 6	Deployment of out-of-the-box integrations (e.g. with customer's CRM system, HR database or accounts system)		
Day 7		Invite customer to book training	
Day 8			
Day 9			
Day 10	Complete integration with customer's pre-scoped back-office systems		
Day 11			Customer support call
Day 12			Delivery of user training
Day 13			Customer support call
Day 14			Customer's onboarding KPIs checked and relevant onboarding stage reactivated or marked as completed

Red flagging

Knowing what customer success looks like is half the battle. The other (equally critical) half lies in understanding the red flags that indicate when a customer is not on the path to success.

Specifically, these red flags will be:

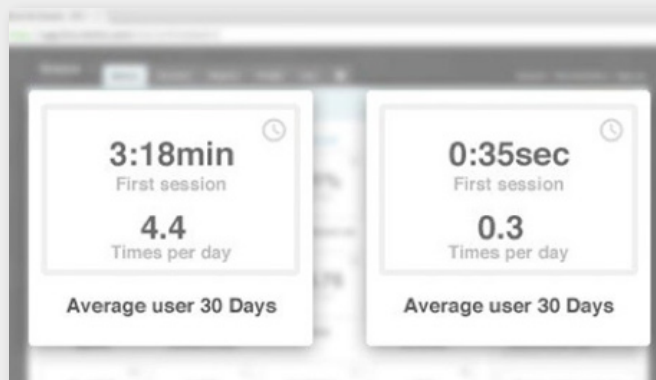
- **The critical friction points/drop-off points in the customer success journey**

This is where your app analytics and reporting plays a crucial role in identifying new customers who are not doing what you need them to do to achieve their first success

To gather the insight you need here, consider using:

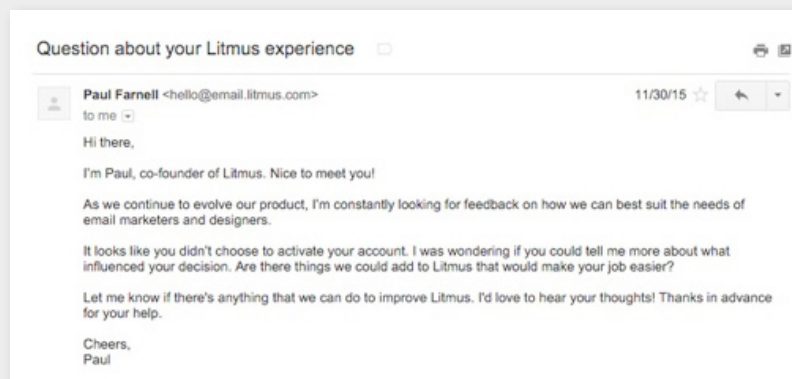
- › In-app analytics
- › Third-party analytics tools
- › Usability studies – online and real-time
- › Customer feedback emails.

The example on the right shows how GrooveHQ identifies platform usage pattern around churn, using third-party analytics platform, Kissmetrics.



The screen grab shows the behavior of a non-churning customer on the left and a churning one on the right. 'Time in app' is used as the key indicator to determine a user's propensity to churn.

We'll cover later in this guide how you can build marketing automation around these red flag trigger points to ensure you're proactively addressing potential customer drop-off before it actually happens.



Litmus builds email automation into its red flagging process to enable the customer to identify any friction points they may be experiencing.

- **The critical friction points/dissatisfaction points in the onboarding journey**

This is where your customer surveys and feedback from your sales and support teams will provide much of the insight you need. Once you've identified any potential friction/dropout points in your onboarding process you can remedy them.

For example, if a friction point lies in your new customer failing to book or take part in user training, then you'll be looking to create a more compelling and dedicated cross-channel comms plan around that particular call to action (CTA).



Section 5:

Responsibility structure

Once you've planned the customer success map and determined your onboarding KPIs, you then need to delegate the responsibility for each to an individual or team. Responsibility will vary in accordance with the structure of your organization, but you need to plan for three key areas:

- › Technical deployment/activation
- › Onboarding
- › Customer success.

The allocated responsibility should then be incorporated into each stage of the onboarding journey map.

Tip for success:
Appoint a customer success manager

Whether focusing on key accounts, or all accounts, this role can be pivotal in the delivery of truly successful onboarding.

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count.get(i).toString() ) +  
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Section 6:

The fundamentals of effective onboarding and activation

There are five key deliverable elements to an effective, KPI and customer-success-driven onboarding approach:

1. Troubleshooting and guidance
2. Tutorials and user support guides
3. Training – online and real-time
4. Social proof
5. Use cases.

Each of these elements can be delivered to new customers through multiple channels, from in-app to email to face-to-face. It's this multi-element, multichannel approach that will help you drive greater new customer success.

Training

If training is a key element to driving new customer success for your business then be sure to create training offerings that are targeted and relevant.

Consider:

- **Segmenting your training offering by type of user and user needs or aims**

Asking a new customer at the start of their new user journey (in your welcome email and welcome call, for example) what their level of use and user aims are, will help you plan relevant and effective training support.

- **Segment your training offering based on stages in the new user journey**

Each stage of the new user journey should be accompanied by its own tailored training offering, with particular focus on helping the user achieve early key successes.

- **Offer training across multiple learning environments**

When it comes to training, flexibility is key. The more accessible you make the training the more likely it will a) be used, b) help the customer and c) save you time. Look to deliver your new user training across multiple environments, from video, webinars and e-learning, to classroom and bespoke, face-to-face training.



Section 7:

Key channels for success

1. Customer service

From your first-line user support through to the account management team, this channel is crucial for delivering onboarding success.

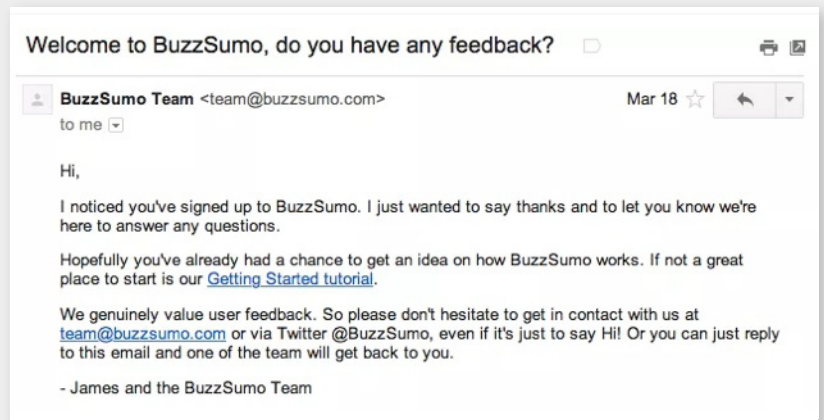
Secrets to success

- › Make it easy for the customer to reach you (explain where, how and when).
- › Allow the customer to choose their preferred communication channel, from email, live chat and social to telephone and mail.
- › Respond to all enquiries with expectation setting. Use auto-responder emails for timely and effective responses.
- › Deliver on the expectations you set.
- › Follow up all customer service interactions with a 'How are things going? Need any more help?' call and/or email.
- › Be time sensitive and take into account the customer's location.

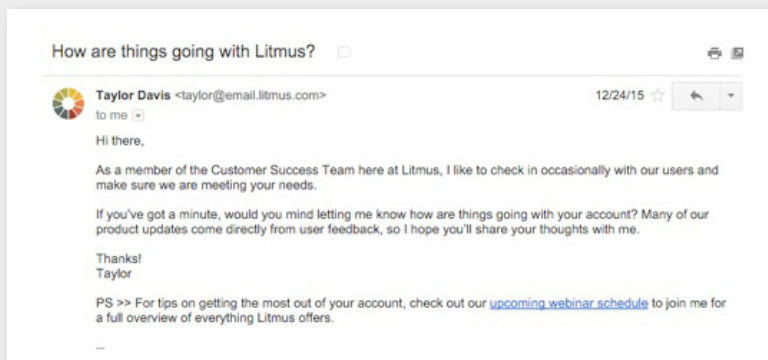
2. Marketing automation and event-based messaging

Much of your onboarding messaging and engagement can be dealt with using marketing automation. Triggering messages based on a user's behavior, or failure to demonstrate a specific behavior, will help you lead new customers down the path you need them to take, and avoid the pitfalls you know can lead to customer dropout.

All the work carried out in sections three and four of this guide will inform your marketing automation trigger points and programs.



This onboarding welcome email from BuzzSumo demonstrates how to effectively offer onboarding support and invite new user feedback, through both email and Twitter.



This example of an automated 'check-in' email from Litmus shows how an email communication at a set point in the new user window can enable red flagging, simply by asking the user how things are going.

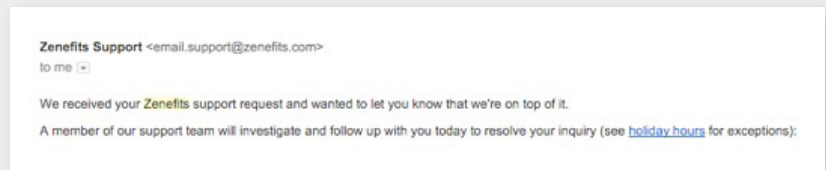
2.1 Email marketing automation

Key trigger points to consider:

- › New user sign-up (welcome program)
- › Abandoned tasks
- › Red flag points
- › Inactivity triggers
- › Missed milestone/KPI triggers.

• First-line support emails

Good email support service is paramount to successful onboarding. Email automation can help you deliver the right support messages and responses, at the right time.



HR management tool Zenefits delivers an automated support ticket confirmation following ticket submission.

On filing a support ticket, the email message the customer receives should:

1. Let them know the query has been registered
2. Make it clear when they can expect a response
3. Offer an alternative form of immediate support if they desire
4. And (ideally) provide links to relevant articles or other troubleshooting material.

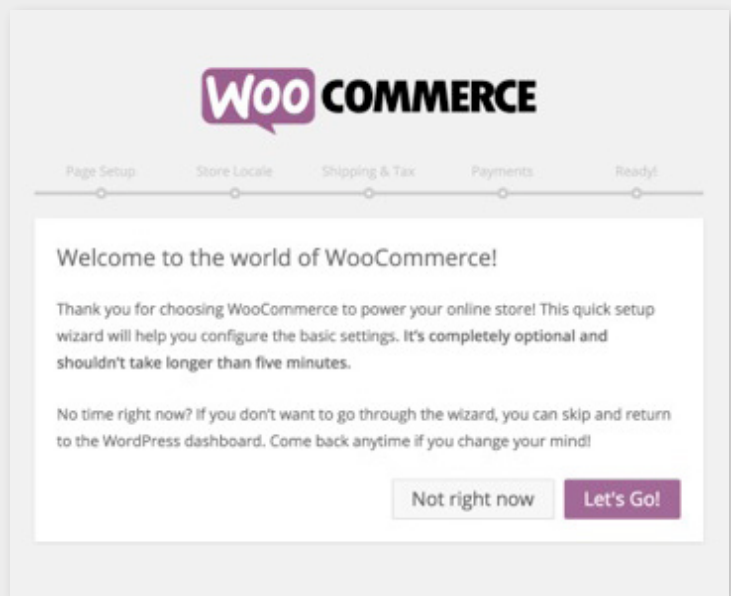
3. In-app messaging

Consider:

- › First-use wizards
- › Progress meters
- › In-app tooltips
- › Live chat
- › Video
- › Product tours
- › Personalized UX (e.g. white labelling and personalizable dashboards).

• First-use wizards

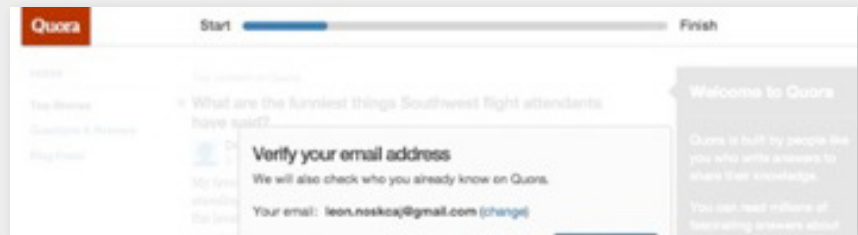
First-use wizards guide your users through the necessary steps to successfully achieve their goals. The first-use wizard should become immediately usable after the technology has been activated. It should be skippable, and offer a manual automatic set up.



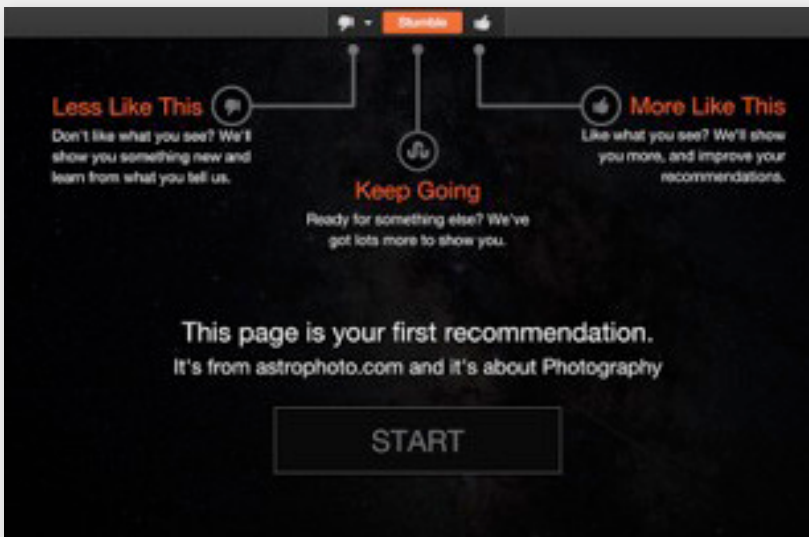
This example of a quick setup wizard from WooCommerce includes a progress bar at the start of their wizard.

• Progress meters

Progress meters can be useful tools for reassuring customers during your setup process, and reducing customer dropout.



Quora provide a progress bar throughout the setup process.



• In-app tooltips

Tooltips offer an effective way of delivering guidance at the exact point it's needed, without the user having to leave the screen they are on.

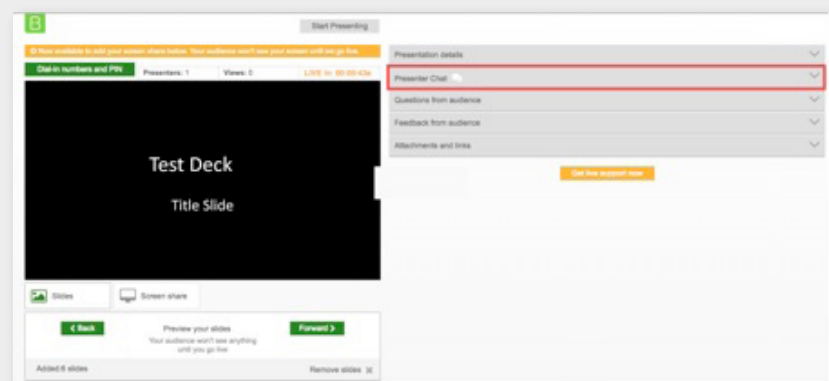
StumbleUpon shows how tooltips can be presented and used in an interactive way to further enhance the new user experience.

• Live chat

New tech users can often feel disconnected from the supplier once they've signed off the contract. Live chat can help you overcome that disconnect by providing realtime support.

Adding live chat can help you:

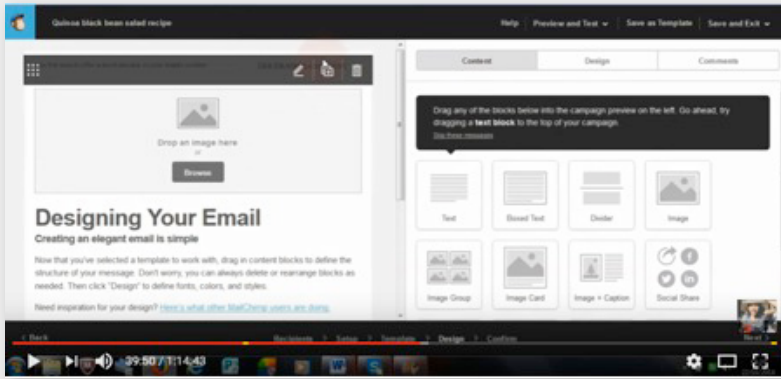
- › Increase new user trust
- › Reduce first-line support ticketing
- › Improve response to customer feedback
- › Increase activation conversion rates.



See how BrightTALK offers presenter-to-presenter chat to enable its users to communicate with other presenters and moderators about technical issues.

- **Video**

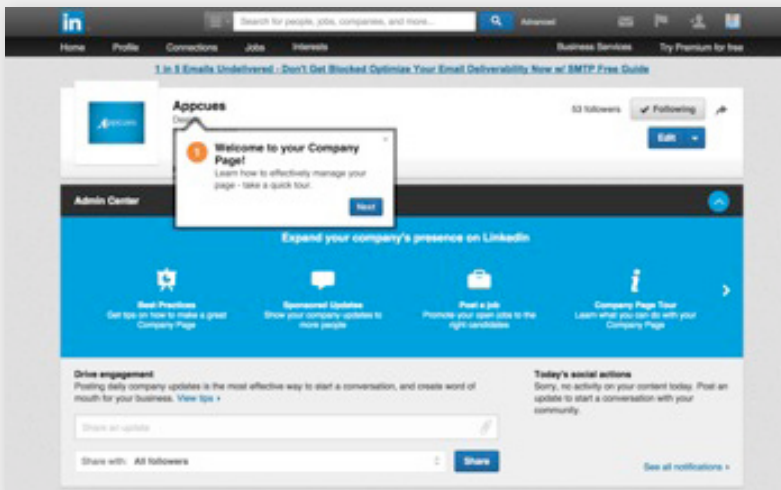
Whether delivered in-app or outside of the platform user environment, video provides a uniquely effective way to deliver tutorials, tooltips, user guidance and support.



MailChimp makes good use of how-to videos as online tutorials that deliver user success around key tasks and user journey milestones.

- **Product tours**

The best product tours take two to five actions – go much further than that and the tour can start to feel like a chore.



LinkedIn provides a great example of how simple and intuitive these walk-throughs can be.

4. E-CRM

E-CRM is a more digital, data-driven approach to traditional CRM, incorporating data-driven automation based on multi-channel customer engagements. E-CRM will enable you to automate tasks and activities for your sales and account managers, customer success managers and client support teams.

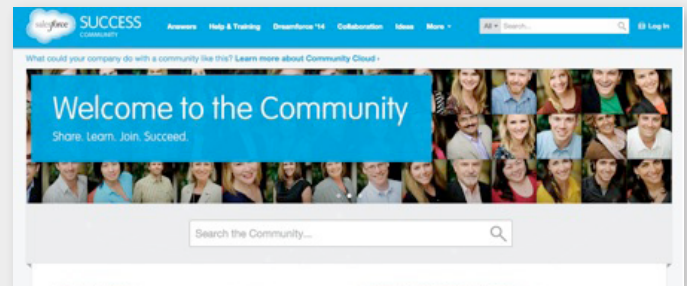
Consider automating your account management and client support activities through your CRM, based on:

- › Abandoned tasks
- › Red flag points
- › Inactivity triggers
- › Missed milestones/KPI triggers.

Social CRM enables you to extend your sales activity automation to social media engagement triggers.

5. Forums/user groups/communities

The more your new customers can learn from the experience and knowledge of other engaged customers the better. By creating and encouraging the use of a user forum or community, whether in LinkedIn or on a brandable forum app, you can help drive this engagement and empower customers to help themselves.



Salesforce Communities provide forums for users to ask questions, review their schedules, log cases, log tickets for IT, manage expense reports, find training materials, search knowledge databases and collaborate with other users.

6. Face-to-face

Many tech companies are reaping the benefits of offering face-to-face onboarding experiences. These events not only demonstrate that you genuinely care about your customers (and therefore catalyse advocacy), but also them an opportunity to share their stories with other companies and learn from one another.

Face-to-face events to consider:

- › Seminars
- › Breakfast meetings
- › Roadshows
- › User conferences.

7. Billing

Don't just bill. Offer help. If your first communication with a new customer comes in the form of an invoice, make sure it comes with an offer of help or a piece of content that adds value to their experience.

Tip: Build and promote a portal within your website where new customers can find adoption-focused content, training videos and email templates.

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result =  
get(0).  
get() +  
get(1).  
get();  
Integer.  
get(result);
```

```
sub = new  
);  
e = count.  
/ 2;
```

Section 8:

Secrets of success

Whichever onboarding elements and channels you're focused on, there are four key secrets to success, and you should make sure each of them is built into your plan.

1. Gamification and rewards: these should be available for new customers achieving success points in your customer journey, for those completing training and self education, for those referring your product, and for those sharing the success they've had with your product.
2. Be visual: focus on a 'show, not tell' approach to educating your new users.
3. Inject personality and humanity into your communications: new tech can be daunting for new users. Ensure the language you use is humanizing and injecting warmth and empathy into the user experience.
4. Integrations: if you partner with other tech vendors who have great plugins to your app/service, encourage uptake and usage of this from the start to help lock the user into your brand.

Gamification

Innovative businesses across all industries are using gamification methods to increase conversions, inspire employees, generate buzz and boost customer loyalty.

Marketo provides an example in the martech space of how gamification can deliver success in a new user education program. Marketo partnered with Badgeville to create a gamification program that allows them to identify, measure and reward valuable user behaviors across their community, recognize brand advocates and increase customer adoption and maturity.

The results have driven significant customer engagement within the community experience.

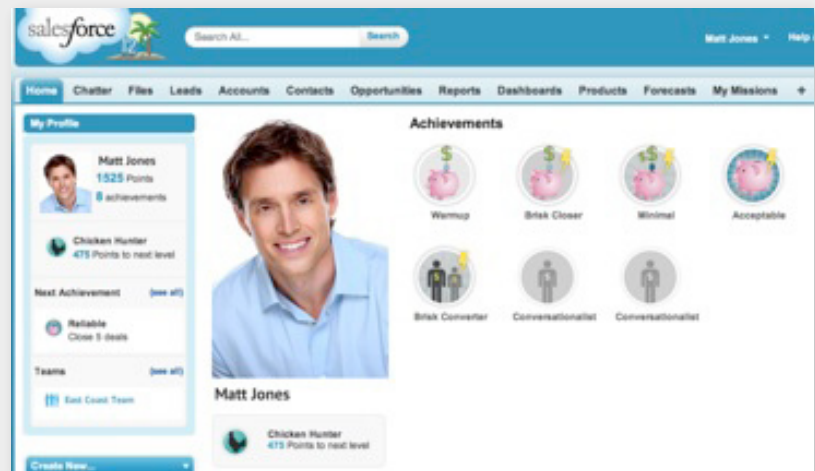


Marketo outlines four methods for leveraging gamification:

- › Method one: prizes and rewards for social sharing
- › Method two: open to engagement
- › Method three: timing urgency
- › Method four: competitive leaderboard.

Salesforce also leads the way in terms of gamification. Within the Salesforce app, companies are able to quantify employee behavior and use a more objective approach to measure performance. Employees can compare themselves to their colleagues and realize the role they are playing in the company objectives.

Your goal is to boost adoption, compliance, and, most importantly, productivity within the workplace by providing frequent recognition and better feedback to the end user.



```
}  
}  
  
if( (size*2) != count.size() )  
sub.add( count.get(size) );  
  
count = new Vector();  
count = sub;  
//System.out.println( count );  
}while( count.size() != 2 );  
  
String result = count.get(0).  
toString() + count.get(1).  
toString();  
return Integer.parseInt(result);
```

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00000000  
0 000000  
00000 00
```

Section 9:

Enabling advocacy

Although in many instances your customers will shout about their success as users of your product without any prompting, there are key ways to encourage advocacy.

Reviews

Once milestones have been met, follow-up communications are a prime time to ask for reviews. Request and incentivize reviews in follow-up email and social comms.

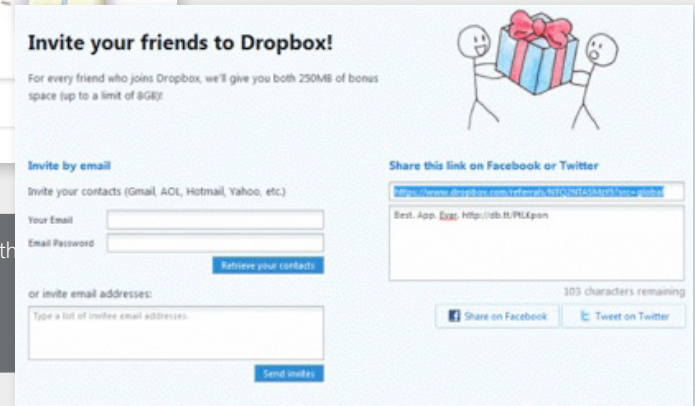
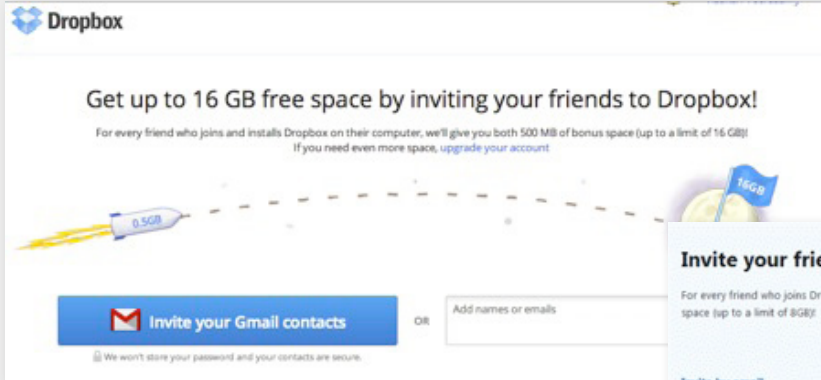
Customer surveys

Customer satisfaction surveys will help you discover your advocates. And there's just one key question you need to ask: How likely would you be to recommend us to your friends or colleagues?

By leveraging the data from a customer survey, R & G Technologies were able to ask the right clients for referrals. It helped them grow over the last year as they found their referral leads convert at around 90%.

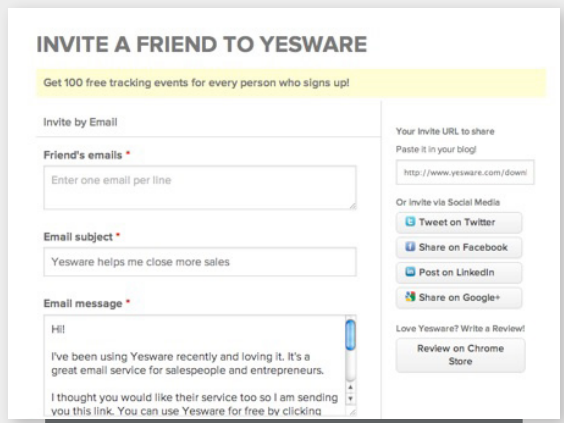
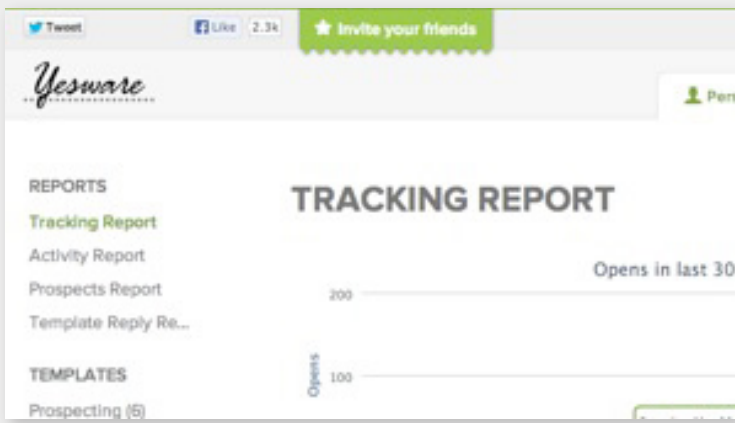
Incentivized referrals

Dropbox provides a hugely successful example of tech customer referral marketing that has delivered phenomenal growth for the brand. (See next page).



Dropbox's referral program is effective because there's something in it for each party: Dropbox gives extra storage space to both the referrer and the referees. The scheme has raised them (literally) hundreds of millions in revenue.

Yesware is another tech brand using incentivized referral schemes to great effect.



On registering for the product, the first thing a new user sees in Yesware is a flashing box inviting them to 'invite your friends', which leads on to a simple 'invite and share' form.

Social sharing of success

Enabling, encouraging and driving success sharing on social is crucial to harnessing the power of customer advocacy. The key here is to prompt and enable conversations to take place at the important moments in your new customer journey.

Be sure to build social sharing buttons into all your comms around success achievement, and gamification program rewards.



```
sub.add( newC ),
}
}

if( (size*2) != count.size() )
sub.add( count.get(size) );

count = new Vector();
count = sub;
//System.out.println( count );
}while( count.size() != 2 );

String result = count.get(0).
toString() + count.get(1).
toString();
```

Section 10:

Test, rinse, repeat

As with any other marketing activity, monitor the results and metrics of your onboarding program on an ongoing basis. Test and/or AB test different elements of your program in order to identify the winning variations.

Remember that in section three and four of this guide you have already identified the stages of your customers' success journeys, and your onboarding KPIs. Be sure to build these into your reporting.

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