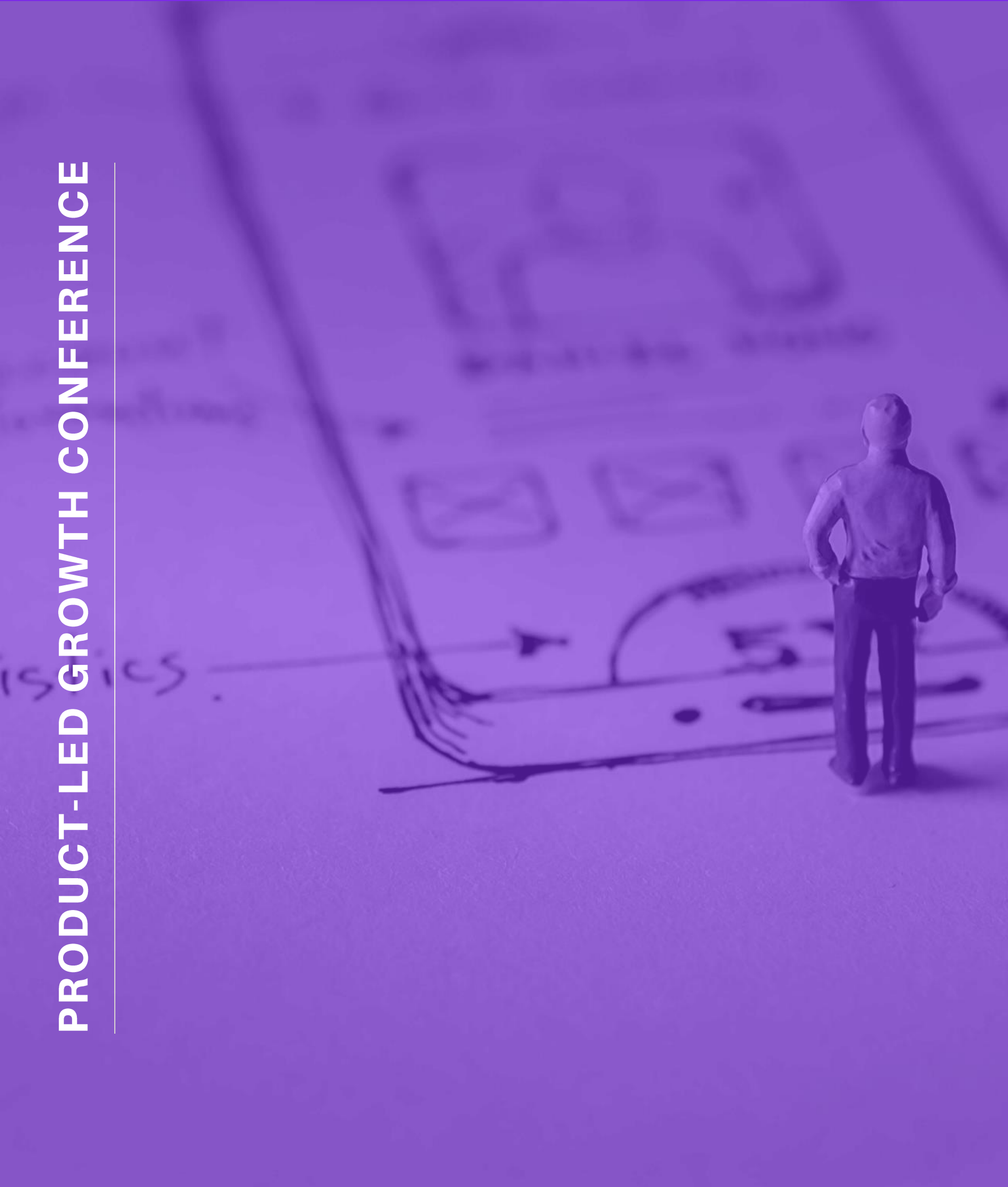
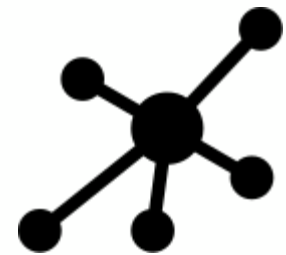




PRODUCT-LED ONBOARDING: THE KEY TO UNLOCKING PLG



ONBOARDING FOR ENTERPRISE END USERS



HEAVY WORKFLOW



MANY TIMES IS NOT BEING ASKED



TAILORED ROUND OF TRAININGS



90 DAYS ONBOARDING TIMELINE

ONBOARDING FOR SMBs



MULTITASKED



DECISION MAKER

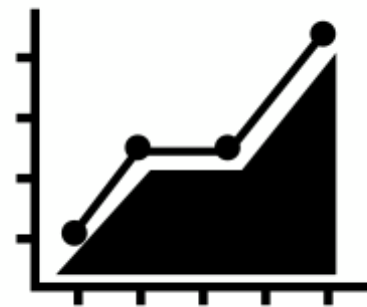


SELF-SERVE RESOURCES



SHORT LEARNING CURVE

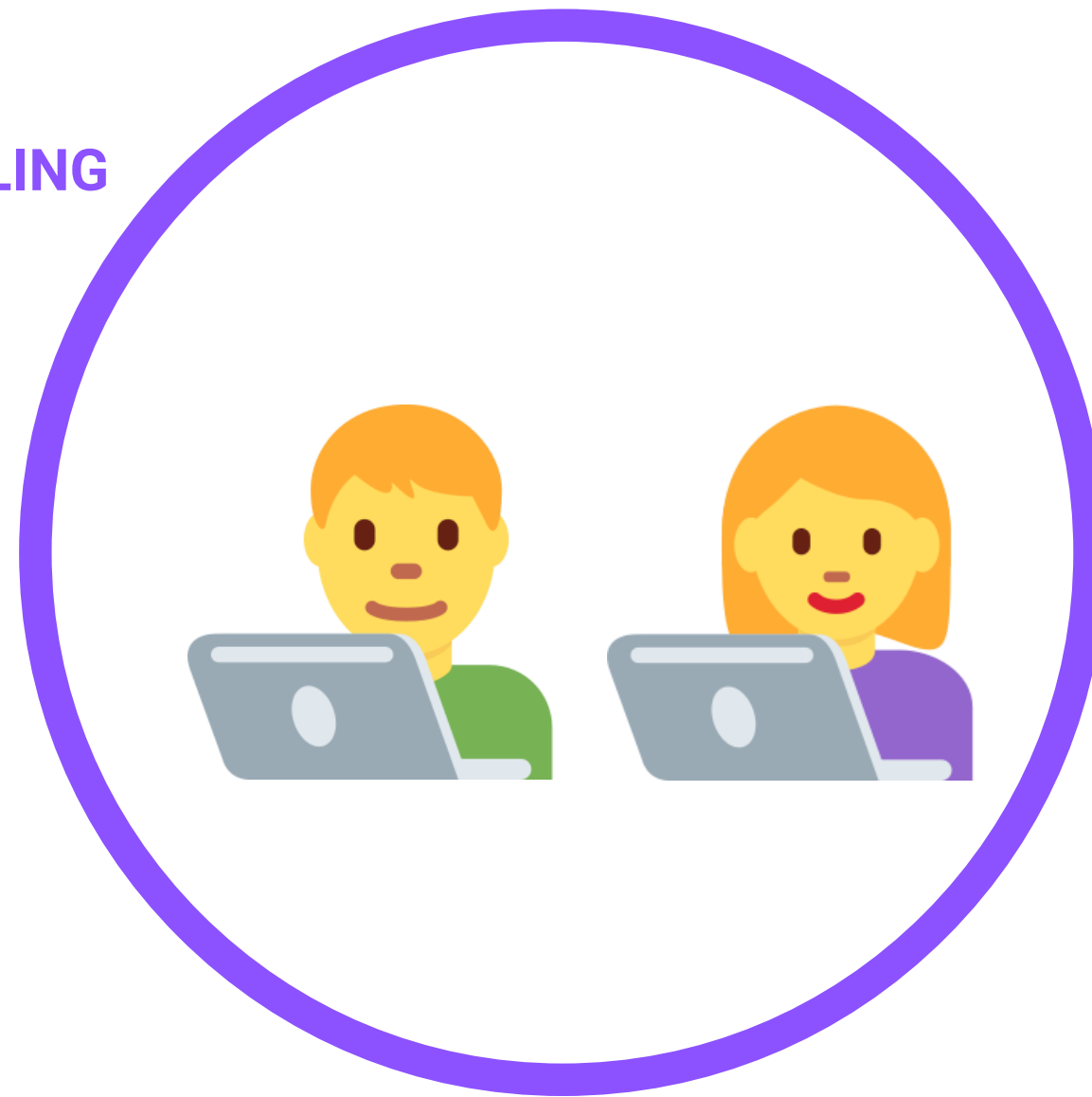
END USERS LOOK FOR



PRODUCTS ENABLING
THEM TO GROW



TIME TO VALUE
ELIMINATION

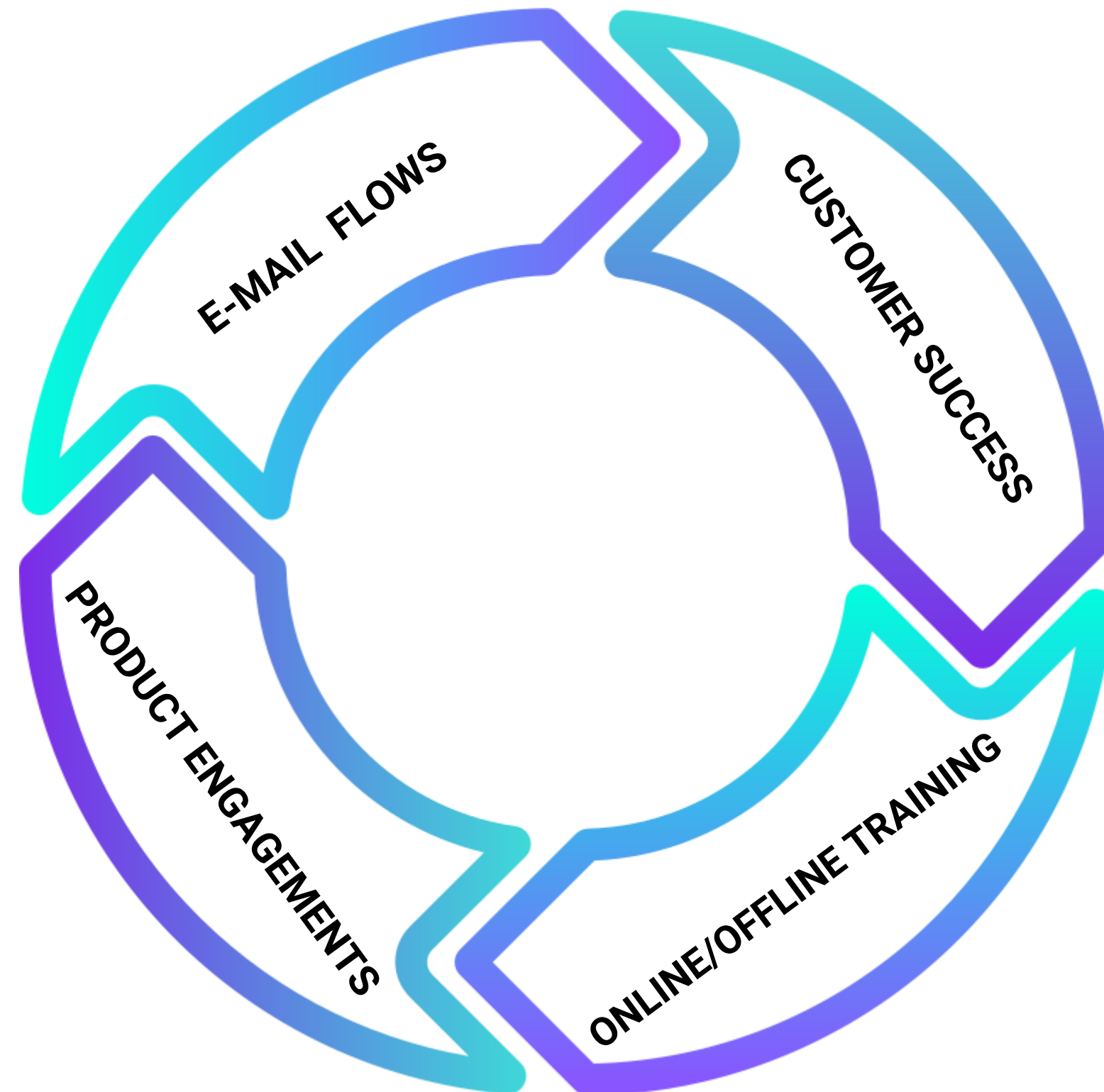


FRICTIONLESS
CUSTOMER JOURNEYS



TAILORED PRODUCT
ONBOARDING EXPERIENCES

WHAT IS USER ONBOARDING?



ONBOARDING STRATEGY INCONSISTENCIES : MID-MARKET & ENTERPRISE



- ✓ **INCREASED CAC & CORE**
- ✓ **END USERS INTERNAL BUY-IN**
- ✓ **INCREASED HANDHOLDING**
- ✓ **INCREASED TTV**
- ✓ **PRODUCT EXPERIENCE IS NEGLECTED**

ONBOARDING STRATEGY INCONSISTENCIES : START-UPS & SMBS



- ✓ **EMPTY STATES**
- ✓ **RANDOM PRODUCT ENGAGEMENTS**
- ✓ **INSUFFICIENT SELF SERVE RESOURCES**
- ✓ **ONBOARDING STOPS ON ACTIVATION**

STATE OF PRODUCT-LED EXPERIENCE (RESEARCH IN OVER 50+ SAAS ORGS) RESULTS :



- ✓ **CUSTOMER CHURN (92%)**
- ✓ **SIGN-UPS (MARKETING METRIC) 80%.**
- ✓ **FREE TRIAL DELIVERY 75%**
- ✓ **ACCOUNTS ACTIVATION WITH 51%**
- ✓ **EXPANSION MRR (64%),**
- ✓ **NET RETENTION (55%)**

STATE OF PRODUCT-LED EXPERIENCE (RESEARCH IN OVER 50+ SAAS ORGS) RESULTS :



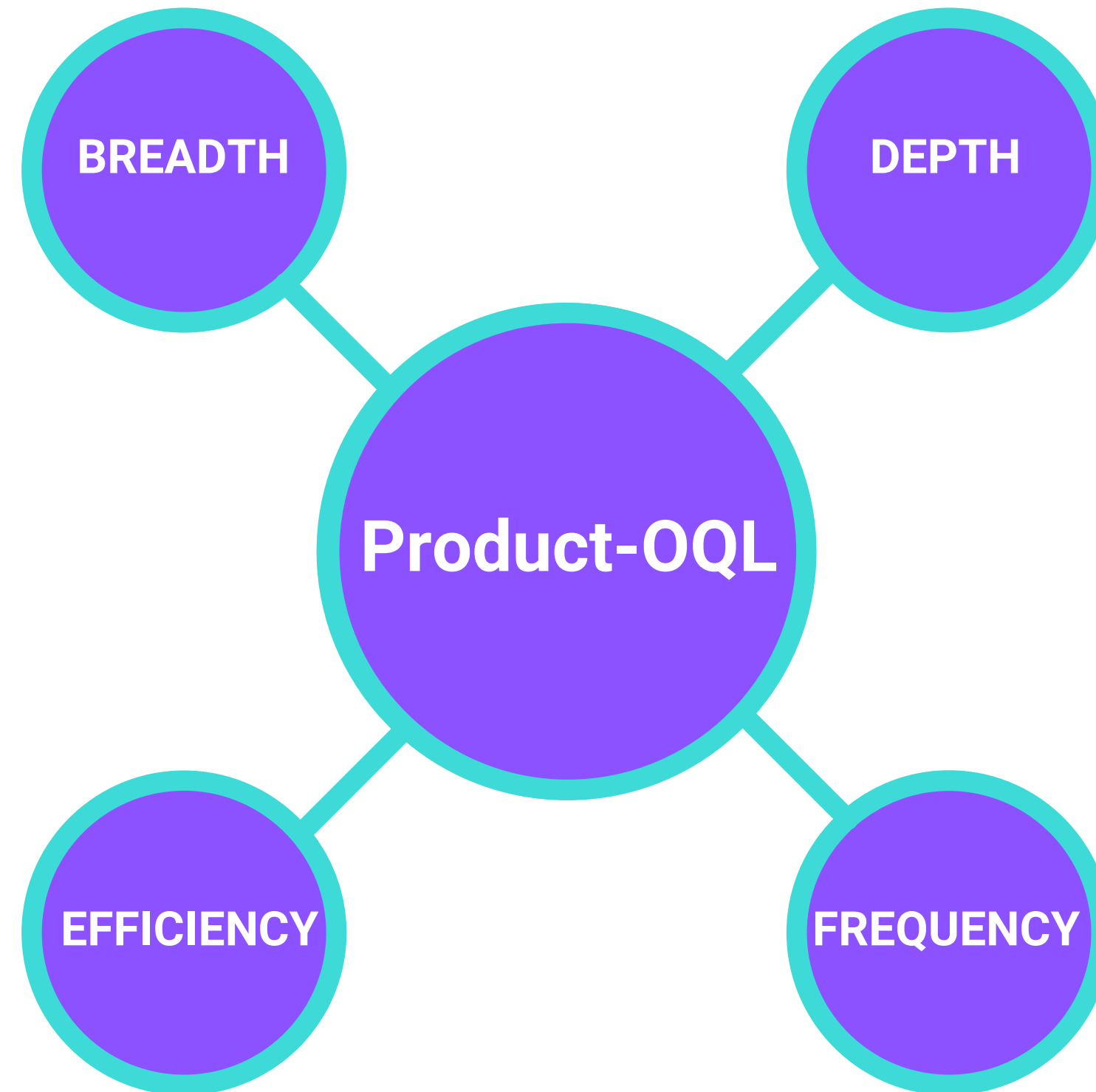
- ✓ **TEAM ACTIVATION FALLS BEHIND WITH 18%**
- ✓ **FEATURE ADOPTION AND USER ENGAGEMENT 13%**
- ✓ **NPS (65%) VS. CUSTOMER ADVOCACY (5%)**
- ✓ **CUSTOMER RETENTION COSTS (15%)**
- ✓ **LTV (4%)**
- ✓ **USER TYPE & PROFICIENCY (5%)**

WHAT IS PRODUCT-LED ONBOARDING?



- ✓ **PLG FUNDAMENTALS**
- ✓ **INVESTMENT IN HISTORICAL PRODUCT DATA**
- ✓ **JTBD FRAMEWORK PER USER ROLE & USE CASE**
- ✓ **BEHAVIORAL PRODUCT ONBOARDING ACTIVATIONS**
- ✓ **CONTEXT OF USAGE**
- ✓ **BECOMES AN INTENTIONAL EFFORT**

PRODUCT-LED ONBOARDING METRICS



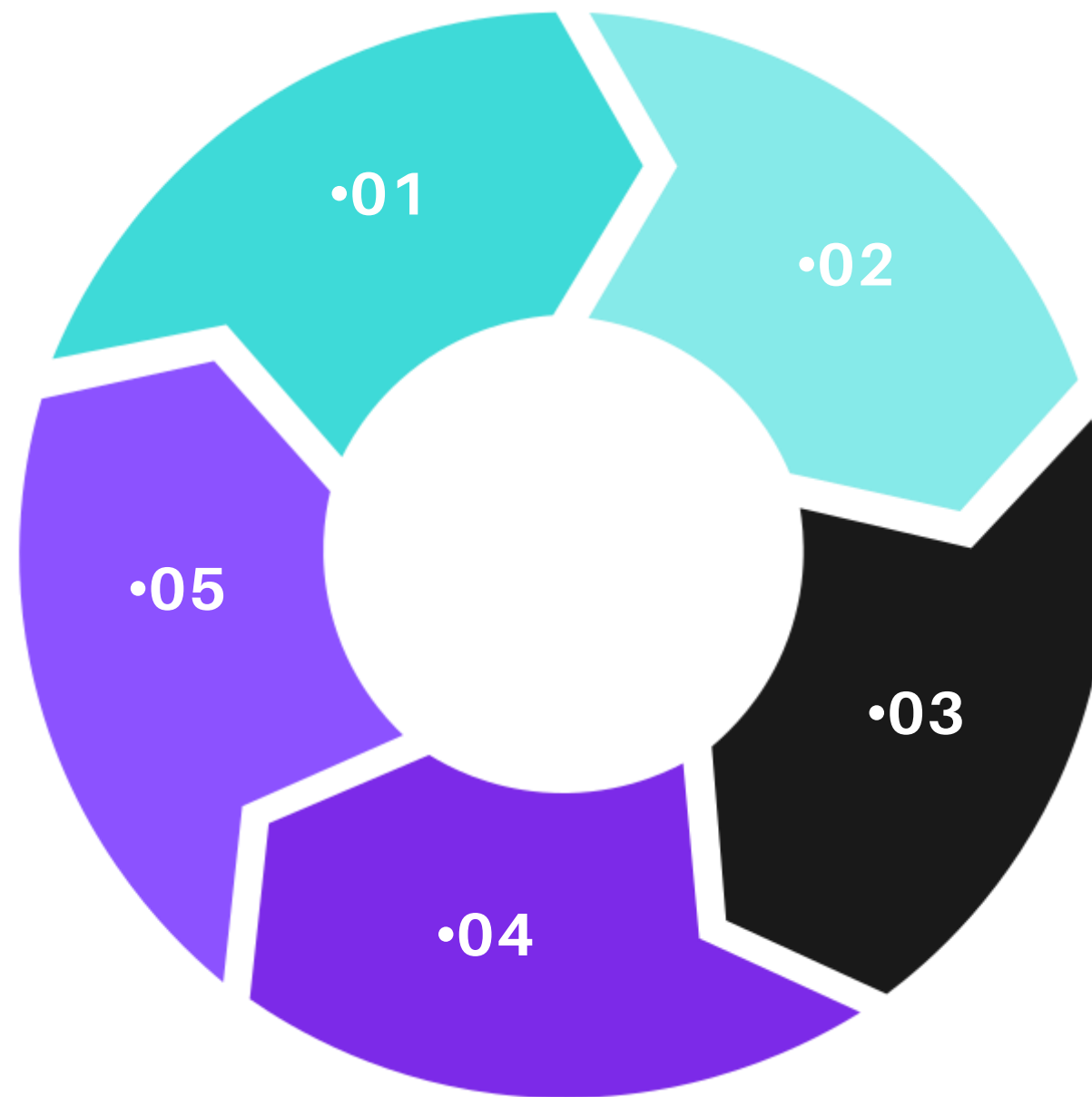
SALES FUNNEL VS PLO FUNNEL



•**Stage 1**
Trial

•**Stage 2**
Initial Value

•**Stage 3**
Paid Conversions



•**Stage 4**
Release

•**Stage 5**
Initial/True Value

•**Stage 6**
Upgrades / Expansion

PRODUCT-LED ONBOARDING

PQLS VS. PRODUCT-OQLS CRITERIA & RESULTS



PQLs

Showcase in-product behavior (TOFU)

Optimize CAC

Sales teams become proactive

Help find patterns that decrease TTV & increase activation levels.

Product OQLs

Showcase in-product behavior (throughout the customer lifecycle)

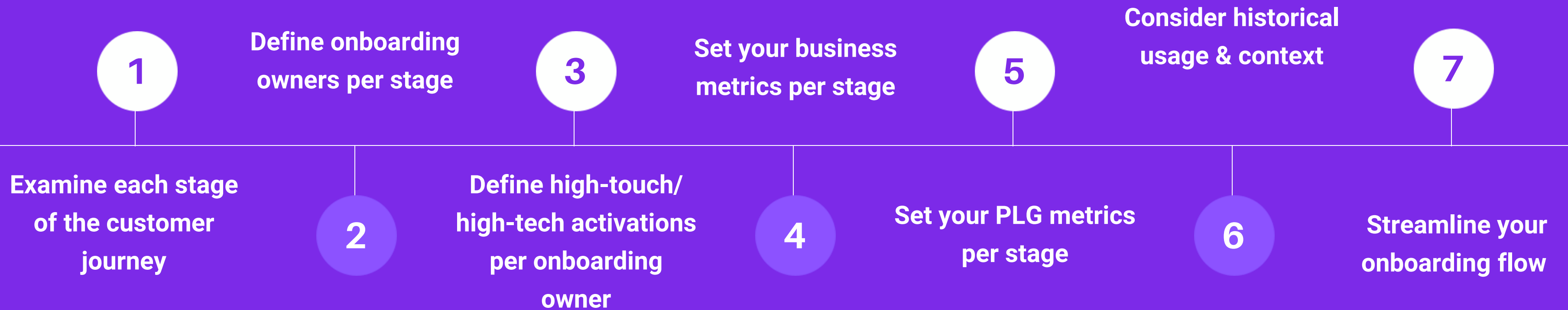
Optimize CAC & CORE

Customer Facing & Product teams become proactive

Help find patterns that decrease TTV & increase activation, retention & expansion levels

ONBOARDING OWNERSHIP

CONSIDERATIONS



ONBOARDING OWNERSHIP

CONSIDERATIONS



- 01** *Why* Why should a department get involved?
- 02** *When* When should it intervene during the onboarding process?
- 03** *How* How would it intervene? (high-touch vs high tech activations)
- 04** *ROI* How is onboarding ROI affected?
- 05** *Impact* Overall Impact on the onboarding journey

PRODUCT-LED ONBOARDING

GAINSIGHT PX IN-PRODUCT SEGMENTATION



✓ FIRST-TIME EXPERIENCE

Goal: Streamline product onboarding milestones in terms of % of PQLs completing setup, and using key features.

Result: Paid conversion rates increase between 10% to 17%.

✓ NEW PRODUCT RELEASE

Goal: Increase key features adoption.

Tactics:

- Email Release Notes.
- Segmented In-App Sliders Targeted
- In-App guides for selected key features.

Result: 16% increase on adoption within the first day of release.

PRODUCT-LED ONBOARDING

USERLANE INCEPTION PROJECT



✓ GOALS

- Increase user engagement and activation
- Increase trial-to-paid conversions by at least 30%
- Decrease TTV, and time to key features adoption
- Reduce onboarding completion
- Eliminate high-touch activations costs by 60%

PRODUCT-LED ONBOARDING

USERLANE INCEPTION PROJECT



✓ RESULTS

- Retention (W1): +225%
- Frequency of use (user level): +67%
- Frequency of use (account level): +82%
- Active Accounts (W1): +47%
- Paid Conversions: 50%
- Depth of use (Adoption D1): +255%
- Depth of use (Adoption W1): +187%
- Depth of use (overall): +45%
- Breadth of Use: +84%
- Efficiency of use (Onboarding completion & TTV) within 48 hours: +38%
- High-touch Onboarding costs: -63%

PRODUCT-LED ONBOARDING

PERSPECTIVES



- ✓ **LEADS TO BOTH INITIAL AND TRUE VALUE**
- ✓ **CONSIDERS EVERY STAGE OF THE CUSTOMER LIFECYCLE**
- ✓ **LEADS USER EXPERIENCE**
- ✓ **CONSIDERS BUSINESS & PRODUCT-LED METRICS**
- ✓ **MAKES THE ONBOARDING STRATEGY AN INTENTIONAL EFFORT**

PRODUCT-LED ONBOARDING

PREREQUISITES



- 1. ADOPT IN-PRODUCT SEGMENTATION CRITERIA**
- 2. INJECT CUSTOMER FACING TEAMS TOUCHPOINTS**
- 3. ADOPT THE REQUIRED TOOLSTACK**
- 4. RECONSIDER ONBOARDING KPIS**
- 5. INVEST IN CONTEXT OF USAGE**

PRODUCT-LED ONBOARDING

THE KEY TO UNLOCKING PLG



THANK YOU