



When It Comes to SaaS Client Onboarding, The Key is Getting It Right the First Time

Here is your quick action guide to drive success in client onboarding

- ✓ Develop a well-designed client onboarding process
- ✓ Track process metrics
- ✓ Identify critical stakeholders on both sides
- ✓ Be consistent with the cross-team transitions between sales, onboarding to client success
- ✓ Align with & stay connected with clients throughout onboarding
- ✓ Be transparent about the onboarding progress
- ✓ Support your clients' change management process
- ✓ Provide long-term follow-up and support
- ✓ Internal and external onboarding survey and de-brief
- ✓ Never stop improving, automating, and scaling!



A successful transition from a brand-new client into a brand advocate is crucial to your mission. Setuply's comprehensive client onboarding solutions optimize onboarding profitability, accelerate time to value, and drive long-term success.

For all your client onboarding needs, don't hesitate to contact us. We're here to help.

Setuply.com: Onboard Faster, Live Better!

Say *Hello@Setuply.com*

