CONCEPT

Customer Onboarding Strategy: Time-to-Value, Activation and Early Churn

4 – 8 January 2027
London - Central London four-star



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Ref: 845_20540 **Date:** 4 – 8 January 2027 **Location:** London - Central London four-star **Fees:** 23000 SAR

Introduction:

Customer onboarding is the stretch where new buyers either reach first value or quietly drift away, yet many organisations leave it to whoever closed the sale. Welcome messages go unread, kickoff calls lack a plan, activation is never defined and early cancellations are discovered only in the monthly churn report. This Core Concept course equips customer-facing teams to design an onboarding strategy that shortens time-to-value, moves each new account through clear activation milestones and flags early churn risk. Participants produce an Onboarding Journey and KPI Plan for a case product.

Course Objectives:

- Define first value, the activation event and a time-to-value target for each onboarding segment of a B2B or B2C offer
- Design onboarding tiers that match self-serve, guided and high-touch paths to account size, complexity and revenue
- Build welcome sequences, kickoff agendas and activation milestone plans with owners, exit criteria and deadlines
- Organise the sales-to-service handoff so that promises, stakeholders and implementation scope reach the onboarding team intact
- Configure digital self-onboarding assets such as in-app walkthroughs, lifecycle emails and help-centre articles
- Track activation rate, time-to-value, early churn and onboarding CSAT, then test and refine the onboarding flow

Target Audience:

- Managers who own onboarding, implementation or activation of newly signed accounts in B2B services
- Customer experience managers responsible for first-use experience in consumer, banking or subscription services
- Sales managers whose teams hand newly closed deals to service and delivery colleagues
- Service and support managers whose teams receive new customers after purchase or account opening
- Product and digital channel managers who shape in-app guidance, sign-up flows and lifecycle messaging

Course Outline:

Day 1: Onboarding Economics and the First Ninety Days

- Onboarding Scope: Sign-Up to First Value Versus Ongoing Account Management
- Retention Economics of the First Ninety Days: Early Churn and Revenue at Risk
- First Value, Aha Moment and Activation Event Definitions
- B2B Account Onboarding Versus B2C Sign-Up and Account Opening Patterns
- Current Onboarding Audit: Drop-Off Points, Stalled Accounts and Silent Sign-Ups

Day 2: Onboarding Models, Segments and Time-to-Value Design

- Time-to-Value Model: Contract Signature, Setup Complete and First Outcome Timestamps
- Onboarding Tier Matrix: Self-Serve, Guided and High-Touch Paths
- Activation Milestone Ladder With Exit Criteria per Segment
- Onboarding RACI Across Sales, Implementation, Service and Product Teams
- Onboarding KPI Tree: Activation Rate, Time-to-Value, Early Churn and Onboarding CSAT

Day 3: Welcome Journeys, Kickoff and Digital Self-Onboarding

- Sales-to-Onboarding Handoff Brief: Promises, Stakeholders, Scope and Success Criteria
- Kickoff Meeting Agenda and Mutual Onboarding Plan
- Welcome Email and Message Sequence Triggered by Setup Events
- In-App Walkthroughs, Checklists and Empty-State Guidance for First Use
- Help-Centre Articles, Video Tutorials and Onboarding Webinars for Self-Service Learning

Day 4: High-Touch Implementation, Account Opening and Early Warning Signals

- High-Touch Implementation Project Plan: Data Migration, Configuration and Go-Live Gates
- Account Opening and Identity Verification Friction in Financial and Subscription Services
- Trial-to-Paid Conversion and Introductory Offer Pitfalls in Subscription Sign-Up
- Early Warning Signal Catalogue: Missed Milestones, Low Logins and Unanswered Outreach
- Onboarding Recovery Playbook: Escalation Triggers, Re-Engagement Calls and Scope Resets

Day 5: Case Product Exercise: Onboarding Journey and KPI Plan

- Case Product Brief: Mixed B2B and B2C Customer Base With Rising Early Cancellations
- Onboarding Funnel Analysis From Sign-Up, Setup and Activation Data
- A/B Test Design for Welcome Messages, Checklists and Kickoff Formats
- Onboarding Journey and KPI Plan Drafting: Tiers, Milestones, Owners and Targets
- Plan Defence and Peer Challenge on Activation Definitions and Warning Thresholds

Skills You Will Gain:

- Activation Event Definition
- Onboarding Segmentation
- Handoff Brief Preparation
- Kickoff Facilitation
- Lifecycle Message Design
- Implementation Go-Live Planning
- Onboarding Funnel Analysis
- Onboarding Experiment Design

Why Attend This Course:

- Return with an Onboarding Journey and KPI Plan for a case product, already challenged by peers and ready to adapt to your own offer
- Replace vague welcome activity with milestones that show exactly which new accounts are progressing and which have stalled
- Give sales, service and product colleagues one shared definition of first value and one handoff routine
- Compare self-serve and high-touch onboarding practice with managers from software, banking, telecoms and subscription sectors

Conclusion:

New customers decide in their first weeks whether a purchase was worth it, so onboarding deserves the same design discipline as sales. The course moves from onboarding economics and first value, through tier models, milestones and KPIs, to handoffs, kickoff, welcome sequences and self-service assets, then to implementation projects, account opening friction and early warning signals. The final day turns this into an Onboarding Journey and KPI Plan for a case product, defended before peers.