

Customer onboarding and activation

Automatically guides new SaaS customers through personalized onboarding sequences based on their use case and engagement, driving faster time-to-value and higher activation rates.

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Get Your Blueprint

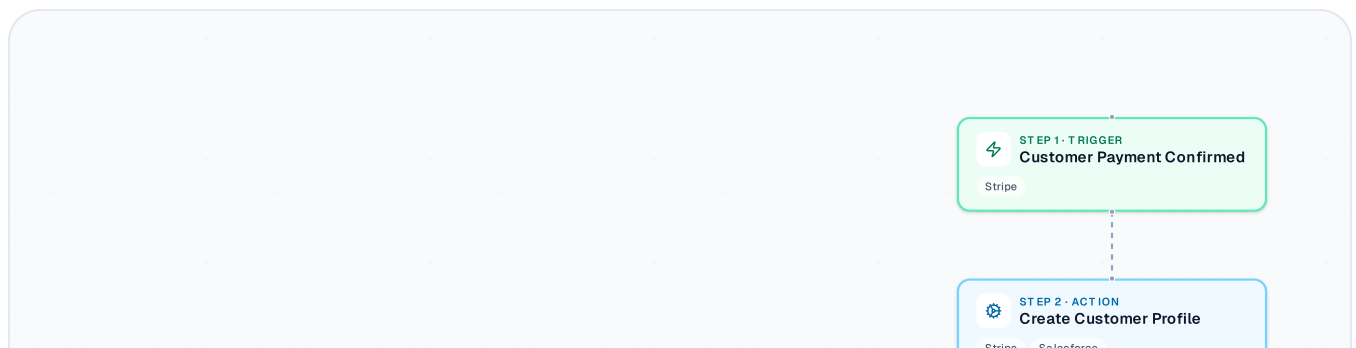


WORKFLOW TRIGGER

New customer completes signup and payment in Stripe

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

Customer Payment Confirmed

New customer subscription is created and first payment is successfully processed in Stripe. Customer data including plan type and company information is captured.

Stripe

2

 ACTION

Create Customer Profile

Customer record is automatically created in Salesforce with subscription details, company size, and initial contact information. Lead is marked as converted and moved to onboarding stage.

Stripe

Salesforce

3

 ACTION

Send Welcome Message

Personalized welcome message is sent via Intercom with getting started guide, calendar link for setup call, and access credentials. Customer is tagged for onboarding sequence.

Intercom

Salesforce

4

 DECISION

Check Engagement Level

System monitors customer activity for 72 hours to determine if they've completed initial setup tasks and shown product engagement. Branches workflow based on engagement score.

5

ACTION

Deploy Targeted Intervention

Low-engagement customers receive proactive outreach via Intercom and Zendesk ticket creation for customer success team. High-engagement customers get advanced feature tutorials.

Intercom

Zendesk

Gainsight

6

ACTION

Update Success Metrics

Customer health score is calculated and updated in Gainsight based on onboarding completion rate, feature adoption, and engagement levels. Timeline and milestones are tracked.

Gainsight

Salesforce

7

OUTPUT

Generate Onboarding Report

Comprehensive onboarding status report is created showing activation progress, next steps, and risk indicators for customer success team review.

Gainsight

Salesforce



Outputs

- Customer health score and risk assessment
- Onboarding completion status report
- Automated support tickets for at-risk customers



Key Metrics

- Time to first value
- Onboarding completion rate
- 30-day activation rate



Tools & Integrations

- Stripe
- Salesforce
- Intercom
- Zendesk
- Gainsight

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