

AUTOMATING YOUR ONBOARDING WITHOUT LOSING THE HUMAN TOUCH



CONGRATULATIONS!

Your Most Important Sale Has Just Begun

HERE'S A HARD TRUTH

Most businesses treat a sale like its the finish line.

But if you care about growing a **loyal and profitable** customer base—it's not the end.

It's the starting gate



Research shows that **increasing customer retention by just 5%** can **boost your profits by 25–95%**.

And yet, **82% of customers** say **they've stopped** doing business with a company simply because of a **poor customer experience**.

So let's talk about the **most important step** after the sale

ONBOARDING



You don't need to choose between **efficiency** and **intimacy**. You can scale your onboarding and keep it human. And when you do it right, onboarding becomes the most powerful sales tool you've got.

A GREAT ONBOARDING EXPERIENCE ISN'T JUST A NICE-TO-HAVE

It's the foundation of long-term client value. It sets the tone, builds trust, and opens the door to continued engagement, referrals, upsells, and repeat purchases.

That's where this guide comes in. We'll show you how to:

01

Automate the parts of onboarding that shouldn't require a human touch

02

Keep your process personal and high-touch where it matters most

03

Build upsell and continuity offers into your onboarding journey

04

Turn new customers into raving fans and lifelong buyers

The Big Opportunity: Why Onboarding Is Where the Real Growth Happens

According to Harvard Business Review the most successful companies treat onboarding as a revenue function, not just a fulfillment task.

Your client has said yes!

Now it's your move.

Let's design an onboarding experience that delivers on your promise—and sets up the next one.

Book your free CMO session here

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Here's why

Customers who experience a structured, supportive onboarding process are more than 2x as likely to stay for the long haul.



Businesses with effective onboarding see an average of 50% higher lifetime value per customer.

Strategic onboarding creates the ideal moment to introduce continuity programs, subscriptions, or high-value add-ons.



Your client has said yes!

Now it's your move.

Let's design an onboarding experience that delivers on your promise—and sets up the next one.

Let's talk onboarding



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What This Guide Covers

You'll learn:

01 The 3 biggest onboarding mistakes that cost companies thousands in lost revenue

02 How to map an onboarding journey that blends automation and personal connection

03 Tools to streamline setup, communication, and scheduling without being robotic

04 The psychology of onboarding—and how to turn it into your highest-converting upsell sequence

05 How to use onboarding to pre-frame future offers and increase client LTV



Every great journey starts with clarity.
If your onboarding isn't mapped, it's costing you revenue and retention. Let's fix that.

Lets build your onboarding engine →

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CHAPTER 1

WHAT IS CLIENT ONBOARDING?

AND WHY DOES IT MAKE OR BREAK YOUR GROWTH?

Client onboarding is the bridge between



and



It's how you turn a **buyer** into a **believer** and ideally, a **long-term partner**.

WHY?

Because your client is **EXCITED**
AND They're **PAYING ATTENTION!**

They just made a decision—and
they want to feel they made the right one.

GIVE THEM THE CONFIDENCE THAT THEY NEED

Let's clear something up: onboarding is not just sending a welcome email and crossing your fingers.

DONE RIGHT ONBOARDING SHOULD....



Eliminate buyer's remorse



Reinforce the client's decision to work with you



Set expectations and establish accountability



**Spark quick wins
(and measurable value)**



Open the door to future revenue and deeper engagement

In short: Great Onboarding Builds Trust
And Trust, Grows Customer Lifetime Value.

Free yourself from the busywork. Reclaim your time, wow your clients, and set the tone for long-term success.

GET EXPERT SUPPORT



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CHAPTER 2

WHY AUTOMATING ONBOARDING DOESN'T MEAN LOSING THE PERSONAL TOUCH

The fear many founders have is that automation will make onboarding cold or robotic.



**BUT IN TRUTH, AUTOMATION IS
WHAT FREES YOU UP TO BE MORE
HUMAN WHERE IT COUNTS.**



When you automate the right pieces, you:



Eliminate repetitive admin work



Ensure consistency across clients



Deliver a friction-free first impression



**Get your clients moving faster,
with fewer delays**

And you can reinvest that saved time into actual conversations, not confirmations.

Your next sale is hiding inside your first one.
Let's show your clients what's possible—before they even ask.

Book a strategy call



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Here's what a high-touch automation strategy looks like



Personalized welcome video sent instantly after purchase



Instant calendar links for onboarding calls



Triggered educational content based on client actions



Reminders and milestone messages that feel human (because they are—just prewritten)

Automation should amplify your humanity—not replace it



It keeps the process moving so you can stay focused on what only you can do.

CHAPTER 3

DESIGNING A HIGH-TOUCH, HIGH-CONVERTING ONBOARDING JOURNEY

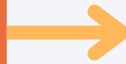
If you want to maximize client retention, upsells, and LTV, you need a plan that does more than just “get them set up.”



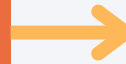
Here's a simple onboarding framework to follow:

STEP 1: THE WELCOME & WOW

Send a custom
thank-you email or
video from the
founder/team lead



Reinforce the
transformation or
benefit they just
signed up for



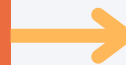
Provide a clear
roadmap of
what's next
(including timelines
and deliverables)

STEP 2: THE INTAKE & INSIGHT

Automate a
branded intake
form or
questionnaire



Include questions
that set up future
offers
(hint: ask about
goals, gaps, and
frustrations)



Use their answers
to personalize the
experience moving
forward

Tools don't create results—systems do.
Let's help you connect the dots and bring it all to life.

TALK TO A CMO NOW



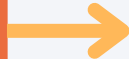
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STEP 3: THE QUICK WIN

Deliver a small but meaningful result in the first 7-10 days



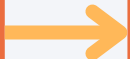
This could be a guide, a short consult, a key deliverable, whatever builds momentum fast



Quick wins build belief which builds retention

STEP 4: THE EXPANSION OPPORTUNITY

As they engage, drip out upsell or add-on offers that feel helpful, not pushy



Use segmentation to deliver offers based on progress or pain points



Highlight your continuity options (monthly check-ins, support programs, etc.)



Remember: Happy clients want to go further if you show them a path.

PRO Tip: Upsells and continuity are acts of service when they solve real problems.

CHAPTER 4



WHAT TO AUTOMATE

AND WHAT NOT TO



Automate anything that can be

TEMPLATED

TIMED

TRIGGERED



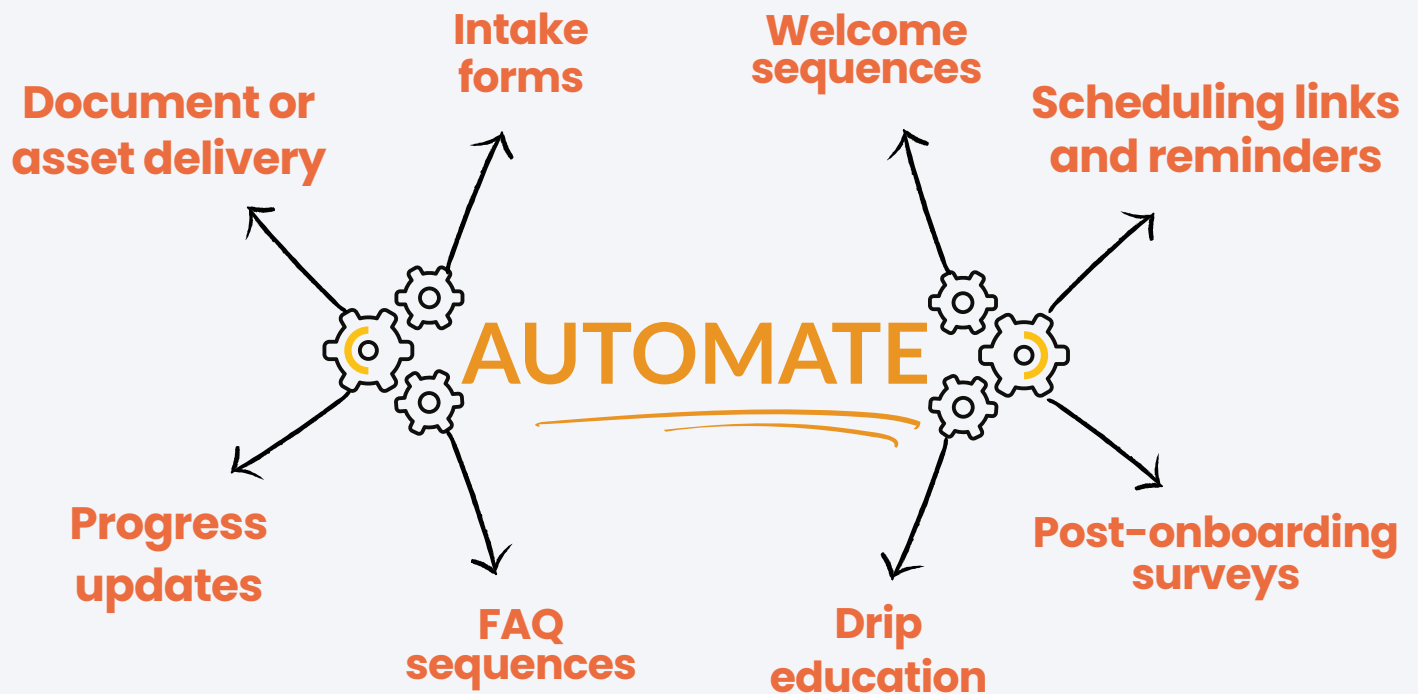
Personalize anything that builds

TRUST

CONNECTION

CLARITY

What Can Be Automated?



PERSONALIZE

Follow-ups based
on intake responses

First deliverable
walkthroughs

Onboarding
calls

Upsell invitations
tied to their goals

"Just checking in"
messages

Tool Tip

Platforms like **HighLevel**, make automation seamless while still offering personalization options.



CHAPTER 5

HOW TO BUILD IN CONTINUITY AND UPSELLS NATURALLY



Let's be blunt:

If your onboarding doesn't include an upsell plan, you're leaving money—and momentum—on the table.

But here's the thing: people don't hate being sold to.

THEY HATE BEING SOLD TO BADLY.

Your Growth Mantra: A good upsell is simply the next natural step.

During onboarding, your client is:



Engaged



Hopeful



Emotionally Invested



Paying Attention

Automation Saves You Time:

And you can reinvest that saved time into actual conversations, not confirmations.

Which makes it the perfect time to:

Introduce continuity offers (coaching, extended support, subscriptions)



Suggest the next tier of service

Create a low-friction path to upgrade

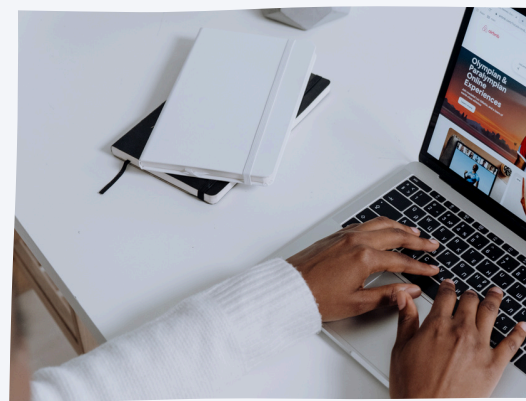


Offer additional tools, templates, or assets

Pro Insight: Don't wait until the end of the onboarding to mention these. Instead, mention them early—casually and confidently—as part of the journey ahead.

CHAPTER 6

REAL EXAMPLES OF HIGH-TOUCH AUTOMATION IN ACTION



If it worked for them, it can work for you. These wins aren't outliers—they're systems. You just need the right blueprint.

BOOK YOUR FREE CMO CALL



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Case Study 1:

Coaching Business → Boosted Retention by 47%

By automating their welcome kit, scheduling, and progress tracking, a coaching client **freed up 10+ hours/week** then used that time to host personalized monthly check-ins.



Result:

higher satisfaction, more upsells, and longer client stays

Case Study 2:

Marketing Agency → Increased LTV by 61%

A lead gen agency **used automated education** (via email and video) to onboard clients into their platform.

They **followed up** manually 3 days in with a “how are you doing?” Loom video and introduced a premium monthly strategy tier.



Result:

34% of clients opted in within the first month.

Case Study 3:

SaaS Company → Doubled Paid User Conversions

Automated onboarding emails included step-by-step video demos, feature highlights, and real-life use cases.

Each email **included a CTA** to join their paid community or book a success call.



Result:

This drove retention and generated upsell revenue from day one

CHAPTER 7

YOUR TOOLKIT FOR ONBOARDING THAT CONVERTS



Here are a few battle-tested tools to help you get started:

Purpose Recommended Tools

Email Automation | HighLevel, ActiveCampaign,

Scheduling | Calendly, Acuity, SavvyCal

Forms & Surveys | Typeform, Jotform, Paperform

Video Messaging | Loom, Bonjoro, Sendspark

CRM& Pipeline | HighLevel, HubSpot, Pipedrive

E-sign & Docs | PandaDoc, HelloSign

FINAL THOUGHTS:
START WHERE YOU ARE
—THEN BUILD

You don't need a million-dollar setup to create a world-class onboarding experience.

You just need to be intentional.

Start with the steps that save you time.

Then layer in the messages that build connection.

Then bake in the upgrades that move your clients forward.

Your next sale begins at “Welcome.”

Let's make that first impression count—and build a journey that leads to lifelong loyalty.

Tools don't create results—systems do. Let us help you connect the dots and bring it all to life.

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LET'S TURN ONBOARDING INTO THE MOST PROFITABLE PART OF YOUR BUSINESS

Every minute you spend manually managing clients is a minute you're not scaling your next offer, deepening loyalty, or increasing lifetime value.

That's where we come in.

At 8020 Media, we build automated onboarding systems that feel deeply personal—because they are.

Our approach blends smart systems with intentional touch-points, so your clients feel supported and your business grows without bottlenecks.

You don't need more to do.

You need a system that does more for you.
Let's build your onboarding flow to convert, scale,
and serve—without sacrificing trust.

BOOK YOUR FREE CMO SESSION NOW



👉 **(Yes, we'll show you how to upsell without sounding salesy.)**