

WORKBOOK

From onboarding to outcomes

A practical workbook for redesigning onboarding around outcomes, value moments and measurable customer progress.



**BREAKTHROUGH
SAAS GROWTH**
WITH THE JASONS

Use this with one real customer segment. The value is in forcing trade-offs, not filling in every box perfectly.

BEFORE YOU START

How to use this workbook

Give yourself 45 to 60 minutes. Bring a recent onboarding plan, one customer segment and whatever adoption or value data you already have.

Work with one segment

Different customers buy different outcomes. A generic journey usually hides the real value gap.

Write in customer language

Avoid internal project terms. Use the words your buyer and sponsor would recognise.

Decide what will change

The output should be a better onboarding operating rhythm, not a prettier document.

WORKSHEET 1

MAP: define the outcome

Start with the outcome the customer bought, then work backwards to the behaviour change needed to reach it.

The customer outcome in one sentence

The behaviour change required

The first visible win

WORKSHEET 2

MEASURE: find the value moments

Value moments are the points where the customer can see that onboarding is creating progress.

Value moment 1

Value moment 2

Value moment 3

Signals that progress is at risk

WORKSHEET 3

MOTIVATE: keep momentum visible

Motivation is not cheerleading. It is the deliberate design of clear next actions, stakeholder proof and useful checkpoints.

The next customer action

The stakeholder update

The checkpoint that proves progress

The escalation trigger

APPLY IT

Guided exercise

Rewrite one onboarding journey using the MAP-MEASURE-MOTIVATE structure.

Remove three tasks that do not directly help the customer reach value.

Add three checkpoints that prove customer progress.

Define the sponsor update that shows value before go-live.

Decide which team owns each value moment.

CHECK YOUR THINKING

Quiz and reflection prompts

Use these questions to test whether the redesigned onboarding journey is commercially useful.

Can the customer describe the value they are moving towards?

Does the plan show value before go-live?

Are you measuring customer behaviour or just internal activity?

Would a sponsor understand the progress without a CS translation?

What risk would you now spot earlier than before?

NEXT STEPS

30-day action plan

Do not turn this into a transformation programme. Pick a small number of changes and run them with discipline.

What we will change before the next onboarding starts

Who owns the change

How we will know it worked

Next practical action

Run the revised journey with one customer segment, then review the first three value moments with Sales, Product and Customer Success.