

60-MINUTE MINI-COURSE

From onboarding to outcomes

For SaaS teams who want onboarding to create visible, measurable customer value - not just a go-live date.

The goal: redesign onboarding around customer progress, value moments and commercial confidence.



**BREAKTHROUGH
SAAS GROWTH**
WITH THE JASONS

MODULE 1

What is wrong with onboarding today

The useful question is not whether onboarding finished. It is whether the customer is now more likely to renew and expand.

- Too many plans measure internal completion instead of customer progress.
- Go-live can happen before the customer has changed any meaningful behaviour.
- Teams often discover value risk only when the renewal is already under pressure.

MODULE 2

The psychology of momentum

Onboarding should reduce uncertainty. Every step should help the customer see progress.

- Customers need early evidence that they made a good decision.
- Visible progress creates confidence, commitment and stakeholder patience.
- Momentum drops when next actions are unclear or disconnected from value.

MODULE 3

The MAP-MEASURE-MOTIVATE framework

A practical structure for moving onboarding away from tasks and towards customer value.

MAP

Define the outcome, the customer behaviour required and the first proof of progress.

MEASURE

Track value moments, customer action and risk signals before go-live.

MOTIVATE

Use communications, checkpoints and stakeholder proof to keep momentum high.

FRAMEWORK STEP 1

Map the outcome

Do not start with your implementation checklist. Start with the customer outcome.

- What business result did the customer buy?
- Which users or teams must change behaviour?
- What is the smallest visible win that proves the product is working?

FRAMEWORK STEP 2

Measure the value moments

If you cannot measure progress during onboarding, you will struggle to prove value later.

- Define two or three moments that show the customer is making progress.
- Separate adoption signals from activity signals.
- Review value evidence before the account becomes a renewal conversation.

FRAMEWORK STEP 3

Motivate the next action

Momentum is designed. It does not happen because a project plan exists.

- Make the next customer action clear, specific and useful.
- Use stakeholder updates to show progress and maintain confidence.
- Treat friction as a signal, not a reason to wait until the next check-in.

MODULE 4

Real-world example

The shift is from delivery status to customer progress.

- Old plan: configure account, train admins, run go-live call.
- Better plan: define target workflow, prove first team adoption and show time saved.
- Commercial proof: sponsor can see progress before the renewal window.

MODULE 5

Guided exercise

Use a real onboarding journey. Generic exercises do not expose the operating gaps.

- Choose one customer segment.
- Write the outcome they bought in one sentence.
- Define the first three value moments.
- Replace low-value onboarding tasks with progress checkpoints.

MODULE 6

Quiz and next steps

Next step: run the workbook exercise with one active customer segment.

- What outcome did the customer actually buy?
- What is the first visible sign of progress?
- Which onboarding activities do not connect to value?
- What should the team change before the next new customer starts?