Solutions for Customer onboarding [Legacy]

Once a prospect has become a Customer, a smooth onboarding process can secure their long-term trust and loyalty. With OnceHub, scheduling setup sessions, training sessions, and installation sessions become an integral part of your workflow. You'll conduct more sessions, reduce time to implementation, and increase Customer satisfaction.

Here are some ways that you can use OnceHub in common onboarding scenarios.

Scheduling onboarding sessions from your portal or app

If you offer online products and services, strategically placing a call-to-action to schedule an onboarding session within your password-protected portal or app is a great way to help Customers learn about your product and how to maximize its benefits.

- The call-to-action to schedule can be placed in multiple places in your software. You can use our Website embed or Website buttons to integrate OnceHub with your app or portal.

- As your Customers are already logged in, these options can be offered only to specific Customer segments who meet certain criteria. For example, you can decide to offer these sessions only to premium users, within a certain time frame from registration, or any other relevant Customer criteria.

- Additionally, the Customer's profile data can be passed to OnceHub. Login integration will allow Customers to be recognized when they make a booking. It will ensure that Customers make the booking with the same email address that they have used to register for your portal, allowing you to relate the booking to your Customer records.

Offering onboarding sessions via personal invitations

Your onboarding Team members might find it useful to send Customers individual email invitations with Personalized links. All your Customers need to do is select a time. There is no need for them to provide personal information or update any information that you already have.

This can be done both for specific Customers, or on a larger scale as part of your automated onboarding process. You can decide to offer this to all of your Customers, or only to those on higher service plans.

> 🗔 **Tip:**
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> You can use the OnceHub for Gmail extension to schedule with Personalized links directly from your Gmail account. You can generate Personalized links, copy them in a single click, and send them in an email.
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> Learn more about OnceHub for Gmail

Integrating scheduling into your online training catalog

Beyond onboarding sessions, you can also use online scheduling together with our Payment integration features to build online training catalogs. You can start by defining training courses consisting of single sessions or multiple sessions, in private or in group format.

You can include a link to your training catalog within your emails or within your portal or app. Your Customers will be able to select from the available training courses, pay for their session, and receive immediate confirmation of their booking and payment in one single action. Using our Payment integration features, all payment activities including payments, invoicing, and reporting are automated.