

Optimizing Customer Experience of Hemlock Printers' Online Customers Through the Customer Onboarding Process

by

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Abstract

Customer experience (CX) has become a powerful tool that gives organizations a competitive edge in this global business world. As a growing business, Hemlock Printers continuously assesses and refines its customer experience to cultivate customer loyalty and long-term engagement. The aim of this report was to provide an overview of efforts made to optimize and streamline the customer onboarding experience of Hemlock Printers online customers. The onboarding process represents a vital opportunity to learn about each customer's unique context, objectives, challenges, and personality to be able to provide each customer with a tailored process that will improve their experience. In essence, customer onboarding, when done right, sets the stage for an excellent long-term customer experience. But neglecting this step between acquisition and driving engagement, leads to missed opportunities and damaged relationships. This report elaborates on the assessment of the onboarding process and the resulting documentation in order to enhance Hemlock Printers' CX. Using the criteria Accuracy, Clarity, Relevance, Engagement (ACRE), I was able to determine the quality and effectiveness of onboarding documentations at Hemlock Printers and the customer retention rate analysis complemented with qualitative analysis of factors influencing onboarding, Hemlock Printers' customer onboarding was reviewed. Regarding the review of the customer onboarding process, the onboarding team and the onboarding documents used, I have provided a comprehensive overview of the methods used.

Keywords: Hemlock Printers; Customer Experience; Customer Onboarding; Customer Journey; Customer Journey Map; Printing Industry; Documents

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Chapter 1: Introduction

In today's highly competitive business landscape, customer experience (CX) has emerged as a critical differentiator for companies across industries. CX encompasses every interaction a customer has with a brand, from initial awareness to post-purchase support. The concept of customer experience has evolved significantly over the years, shifting from a transaction-focused approach to a holistic, customer-centric paradigm. Traditionally, businesses primarily emphasized product quality and pricing as the main drivers of customer satisfaction. However, with the rise of digital technologies and changing consumer behaviors, the focus has shifted towards delivering seamless, personalized experiences across all touchpoints in the customer journey. Customer journey is the life cycle of a customer with an organization and one key stage within the customer journey that significantly influences overall CX is customer onboarding.

Customer onboarding refers to the process of familiarizing new customers with a product or service and guiding them towards realizing its value proposition. This report aims to explore the intricate relationship between customer onboarding and the broader construct of customer experience. Customer onboarding serves as the initial phase of the customer journey, representing the first opportunity for businesses to engage and delight new customers. Effective onboarding processes not only facilitate product adoption but also lay the foundation for long-term relationships. Key components of successful onboarding strategies include personalized welcome messages, clear communication and expectation setting, guided tutorials, proactive support, and intuitive user interfaces.

As explained by Arne, Katherine, Philipp and Timothy (2015) customer onboarding is inherently intertwined with broader CX frameworks and strategies. It sets the tone for the entire customer relationship by shaping perceptions and expectations from the outset. A seamless onboarding experience can foster trust, reduce churn, and increase customer lifetime value. Conversely, a disjointed or cumbersome onboarding process can lead to frustration and disengagement, ultimately undermining overall CX efforts. This report provides a document-based review of the efforts made by Hemlock Printers – an offset and digital printing company located at Burnaby, BC – to optimize its CX through its customer onboarding process.

Studying the customer onboarding process of Hemlock Printers, a print service provider, presents a compelling case study. Firstly, the shift towards digital platforms and on-demand services has transformed traditional business models, making it essential to understand how companies adapt and excel in this environment. Examining the customer onboarding experience offers insights into how Hemlock Printers attracts, educates, and retains customers in a competitive market. Secondly, the print industry has unique challenges related to quality control, production timelines, and customer expectations, making the onboarding process crucial for setting accurate expectations and ensuring customer satisfaction. Lastly, analyzing the integration of technology, user experience design, and customer support in the onboarding journey provides valuable lessons that can be applicable to other organization or sectors undergoing digital transformations. Thus, studying the customer onboarding of Hemlock Printers, an organization with an online print-on-demand portal is not only relevant but also promises to yield valuable lessons for business strategies and customer-centric approaches in the digital age.

The report, presents a thorough review and analysis of existing documents – both primary and secondary – in the organization’s database to provide insight and understanding to Hemlock’s onboarding practices. This helps to identify gaps, inconsistencies and inefficiencies within the customer onboarding practices in the organization. And by comparing documented procedures with actual practices, the report pinpoints areas where improvements are needed to enhance the customer experience and streamline operations. The report outlined the organization and development of documents to enhance the smooth customer onboarding process in Hemlock. Provided an overview of Hemlock Printers’ onboarding process and strategy that have sustained the organization. As well as reviewed the characteristics of the onboarding team as well as the weakness of the team that affect the onboarding process.

The report uses retention metrics and document-based review as methodological procedure for examining customer onboarding experience in Hemlock. Leveraging document-based review as methodological tools allowed me to gain an understanding of the customer onboarding process within Hemlock. By examining various documents such as guidelines, standard operating procedures, and policies, I was able explore the intricacies of the onboarding journey from start to finish. Document review also provided a historical perspective on the evolution of customer onboarding processes within

Hemlock and afforded me the opportunity to trace the development of onboarding practices over time, identify key milestones, and understand how changes in procedures have influenced the onboarding experience. The use of customer retention metrics as methodological tools provided a clear indication of the effectiveness of the organization's customer onboarding processes. By analyzing retention rates, churn rates, and customer lifetime value, I was able to assess how well the onboarding process is retaining customers and fostering long-term relationships.

As customer onboarding entails familiarising a customer with an organization's product and process, in this report, I review and assess elements such as the onboarding team and the onboarding documents that influence the onboarding process. The onboarding team facilitates the process of transitioning the customers and their abilities and inabilities affect the onboarding experience. The onboarding documents serve as a guide to both the customers and the onboarding team and help to systemize the process. Using a criteria known as ACRE (Accuracy, Clarity, Relevance, Engagement), I was able to determine the quality and effectiveness of onboarding documentations at Hemlock Printers: By rigorously evaluating documents against these ACRE criteria, one can significantly enhance the effectiveness and professional quality of the documentation. This approach ensures that documents are not only well-written but also practical and impactful in their application. This report is structured as follows: Chapter 1: Introduction gives a background for the report and overview of Hemlock Group of Companies, and Hemlock Printers. Chapter 2: Enhancing the customer onboarding experience elaborate on the customer onboarding process, customer onboarding team — the influence of the team on the onboarding experience whiles facilitating the onboarding process, and the customer onboarding documents — Impact of the documentation on the onboarding experience. Chapter 3: The process of enhancing and developing Hemlock Printers' customer onboarding documents. Chapter 4: Summary, Conclusion and Recommendations

Chapter 2: Hemlock's Group of Companies

2.1. Overview of Hemlock's Group of Companies

Beginning as Hemlock Printers Ltd., one of North America's most recognized printing companies that was established in 1968, the company has had constant changes and expanded to include three other companies: Hemlock Harling Distribution, responsible for mailing, fulfilment, and distribution; Hemlock Display, responsible for wide format and display printing; and their brand, Paper Chase Press, an ecommerce sales channel based out of Los Angeles. The main Hemlock Printer's facility is responsible for offset and digital printing.

Incorporated as a single company by Dick Kouwenhoven with two employees, Hemlock Printers Ltd has now grown into a group of companies with over 250 employees. Beginning in Burnaby, Hemlock Printers Ltd moved from three other locations within Burnaby to its current 80,000 square foot facility located at Buller Avenue. As its operations expanded, Hemlock Printers Ltd has subsidiaries and has acquired offices at various locations including Richmond, Burnaby, Seattle, Victoria, and San Francisco.

Hemlock Printers Ltd aims to deliver exceptional printed products through its dedication to craft, continuous innovation, teamwork, and sustainable practices and has been recognized as the most progressive sustainable print provider in North America many times over. Having realized that community and connection is a significant factor in achieving its aim, Hemlock Printers' stated purpose is to create connections, build community and inspire actions that safeguard the health of the world's forests in providing their services and operations.

2.2. Structure of Hemlock Printers

Hemlock Printer Ltd, the parent company of Hemlock's group of companies, currently has over 180 employees working various shifts for effective work management and quality control. The management structure of Hemlock Printers Ltd. as seen in the organogram in Figure 1 currently, comprises of Leadership, Operations, Manufacturing,

and Sales teams. The leadership is responsible for managing and developing strategic plans for Operations, Manufacturing, and Sales teams. Hemlock Printers Ltd.'s operations are led by the planning and pre-production Managers. These managers work with the customer service team. The customer service team comprises of digital planning team, estimating team, and the offset planning team. The digital planning team is responsible for all digital projects once confirmed by the Sales team. They handle multiple short-run projects that require quick turnaround time with precision and accuracy. The estimating team is responsible for providing timely and accurate quotes for customers. The offset planning team is responsible for planning jobs on a large scale as well as coordinating various internal teams and external vendors, from beginning to the end of various jobs.

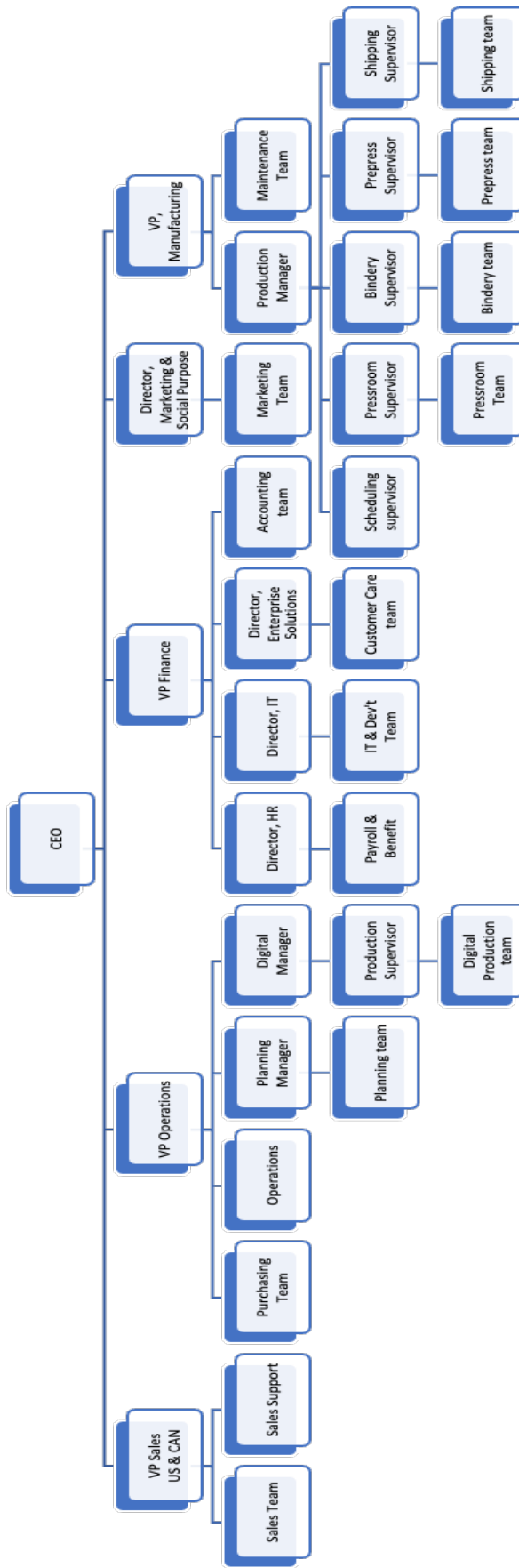


Figure 1 Organogram of Hemlock Printers

The manufacturing department of Hemlock Printers has the digital and offset section. The offset department is led by the production manager and the digital department is led by the digital manager. The manufacturing team comprises of prepress, purchasing, scheduling, maintenance, production, bindery, and logistics teams. The prepress team prepare files for press. As the names imply, the purchasing team purchases the consumables necessary to get jobs done and the scheduling team schedules the project on the press, bindery, and finishing. The maintenance team ensures the facility and all equipment function properly. The production teams produce the printed products. The bindery team gives the finishing touches to all products and the logistics team coordinates how the products are packed, shipped, and ultimately delivered to customers.

The digital manager works hand-in-hand with the digital production supervisor, the enterprise solution director, and information technology (IT) director with their teams comprising of developers at both front and back ends of the online ordering portal, the customer care team and the IT team. The customer care team works with large, Enterprise customers and acts as personal account managers for these customers. Some customers have multiple individuals ordering various print materials and the customer care team handles all incoming inquiries from start to finish. The development team is responsible for creating new websites and storefronts for customers, and also provides Hemlock with new programs for its workflow. The IT team oversees the infrastructure which allows the company to automate routine tasks for optimal efficiency. They help Hemlock communicate, collaborate, and provide teams with the necessary devices, programs and tools needed to perform their daily tasks.

Within this structure, I worked mostly as a customer care administrator and project assistant (Summer 2023 Intern) with the Enterprise Solution team. As a customer care administrator, I handled some incoming inquiries from start to finish and helped the web-to-print development team, I set up customers' products on their ordering portals and connected each product on various internal platforms for seamless workflow. My role as an intern, assisting the customer care and web-to-print product development team, gave me the opportunity to observe and respond to customers' inquiries and transactions. It also gave me the opportunity to work on setting up customers' stationary print products and making changes to setup at the back end of their ordering portal. This role required that I assist the team in providing efficient and effective services to

customers. In the course of my work with the department, the director for the Enterprise Solution department saw the need to engage me to help review and develop the documentation to support their online customer experience during the onboarding process.

While Hemlock Printers has a wide variety of customers, with wide range of products and services they offer these customers, Hemlock Printers still recognized the need to review its customer experience and documentation to ensure their new customers have the best experience during onboarding, hence this report.

Chapter 3: Evaluation of Hemlock Printers' Customer Onboarding Process

In the digital age, where customer experience (CX) is paramount, the onboarding process stands as a crucial initial touchpoint between a customer and a product or service. Central to this process is the documentation provided to customers, which guides them through setup, product features, and troubleshooting and also serves as customer data for the onboarding team. This chapter focuses on a comprehensive review of the customer onboarding experience within Hemlock Printers, with particular emphasis on “Onboarding Process”, the vital role of the onboarding team, and the importance of meticulously crafted onboarding documentations used in Hemlock Printers to get new customers set up and start using their products and services. The onboarding documents are a set of essential documents that describe the process and aid in ensuring each customer onboarded receives consistent experience from their initial contact till the very end of their journey.

3.1. The Onboarding Process

At the heart of every successful customer journey lies the onboarding process, which is a crucial stage that bridges the gap between acquisition and activation. The introduction of an organization's ecosystem, products and services to customers occurs during this crucial phase, establishing the tone for their interaction with the organization going forward. Therefore, understanding and optimizing the onboarding process are paramount to cultivating long-lasting relationships and promoting positive customer experiences.

For Hemlock Printers to provide customer-centric onboarding experience for its customers, there is a need to first understand Hemlock's onboarding process. Understanding the onboarding process helps to uncover issues within the process that needs to be addressed and also helps with developing strategies that will ensure successful onboarding. The steps within Hemlock Printers' customer onboarding process are shown in Figure 2.

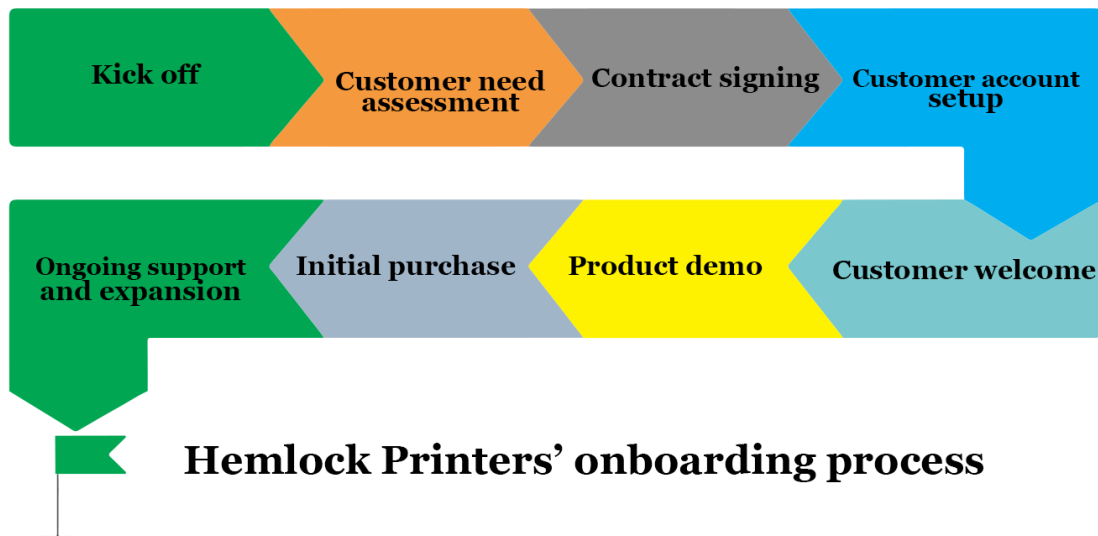


Figure 2: Onboarding Process of Hemlock Printers

Step 1: Kick-off — there is a meeting between the customer, the sales representative, and the customer care director to establish initial engagement. At this meeting, the customer is introduced by the sales representative to the customer care director. The customer’s needs, expectations and milestones are discussed at the meeting.

Step 2: Customer need assessment — based on the discussion at the meeting, the customer care director sends the customer a questionnaire to gather data that helps establish a clear expectation between Hemlock and the customer from the onset. This helps to thoroughly assess customer needs and expectations. Once the customer returns the questionnaire, the customer care director reviews to understand the needs and expectations of the customer; and to ensure Hemlock Printers has the required resources to meet that expectation.

Step 3: Contract signing — when the customer’s needs and expectations are clearly understood by the director, the customer is sent the service agreement to review and sign. Once the agreement is signed, that is the confirmation the customer is ready to complete the onboarding process and transact with Hemlock Printers.

Step 4: Customer account setup — the onboarding team is then tasked with the responsibility of setting up an online account for the customer. The online account is an ordering portal for the customer. With the account setup, it enables the customer to have a visual representation of their product, and they can place orders through their account. The account setup helps the customer to have documented records of their transactions with Hemlock Printers and track their inventory in the case where the customer has inventory items being warehoused by Hemlock Harling, the fulfilment facility of Hemlock Printers.

Step 5: Customer welcome — when the account is set up, a welcome email or letter is sent to the customer with account details. The customer is advised to review the account and send feedback as to whether the account setup meets their expectations and will provide them with value. The customer's feedback either requires further customization or confirmation to move to the next step.

Step 6: Product demo — when the customer is pleased with the account, a guided tutorial on the use of the account is arranged by the customer care director for the client and an onboarding team member. During the tutorial, the customer is guided on how to use the account, and where to find various features and resources such as FAQs available to them in their account.

Step 7: Initial purchase — as the customer makes the first few purchases, the onboarding team reviews the process to ensure smooth transaction. Also, customer feedback concerning the transition from registration to their initial purchase through their account is reviewed by the onboarding team to ensure any discrepancies are dealt with.

Step 8: Ongoing support and expansion — After the initial purchase, continuous personalized customer support services are provided by the customer care and

development team to ensure smooth CX. The customers may also request for addition of more products and services to their account.

3.1.1. Observations

After thorough review of the customer onboarding process of Hemlock Printers, a few observations were made as follows:

- **Speed and Effectiveness of the onboarding process** — The onboarding process is well streamlined that allows for speed and effective working with customers. Customers can start using the digital printing services quickly and experience immediate value without much hassles. The benefit therefore is that the speed and effectiveness of the onboarding process can influence customer satisfaction and retention. A fast, streamlined onboarding experience not only increases customer satisfaction but also boosts retention rates and fosters long-term loyalty and advocacy among customers.
- **User-Friendly Interface and Platform** — Hemlock Printers' customer account or the ordering portal has a user-friendly interface. It is intuitive, easy to navigate and offers helpful prompts and tutorials. A user-friendly interface and platform can significantly impact the onboarding experience as customers are more likely to feel confident to use the service. Conversely, a complex or cumbersome interface may deter customers from fully engaging with the platform.
- **Customer Support and Assistance** — In order to handle customer inquiries, worries, and technical problems during the onboarding process, there must be sufficient customer support and assistance. I found Hemlock Printers provides responsive customer support through various channels e.g., email and phone. As a result, customers are more likely to feel supported and valued.

3.1.2. Weakness/Inefficiency in the process

- **Availability of multiple systems and platforms for customer data storage** that is not accessible to all team members within the onboarding process. The onboarding process lacks a system that: enables all members to see when

required forms are fills, when documents are submitted, when approvals have been given that will better streamline the process.

- Lack of automation in user accounts or platform. The platform or ordering portal lacks automations that automatically suggest point for review or opportunities for training based on customer's challenges on using the platform.
- Complex account setup and long wait time for some customers' support services due to the limitation of the systems used for setting up the workflow. Hemlock Printers faces a challenge in its onboarding process due to complicated account setup and long wait times for customer support, mainly because of limitations in the workflow systems used. The account setup process is sometimes complicated, because of unclear instructions and customer requirement or strict system, leading to frustration. Likewise, extended wait times for support services indicate inefficiencies, potentially caused by limited resources. These issues risk customer satisfaction and business performance.

3.1.3. Summary

Complete understanding of the onboarding process and providing the resources required to make the process efficient and effectively helps to successfully onboard and retain customers. The onboarding process must be well planned and strategized to ensure an optimised onboarding experience. For Hemlock Printers as a commercial printer that offers print on demand services, it is crucial to provide a unique and engaging customer onboarding experience that provides value to the customer in a timely manner.

3.2. The Onboarding Team

In this section, I examined the role that the onboarding team plays in the customer onboarding process. In my analysis, the onboarding team plays a multifaceted role in helping new clients through the onboarding process. The team provides personalized support and cultivates healthy relationships that set the foundation for long-term success and satisfaction. The dedication, expertise, and commitment to excellence of the team, can contribute considerably to the overall CX and the reputation for customer-centricity.

3.2.1. Observations

From daily interactions with the onboarding team, I made the following observations:

- Clear understanding of the goal of the onboarding. Most members of the onboarding team have a clear understanding of the overarching goal of the onboarding process, which is typically to ensure that new customers are successfully integrated into the organization's ecosystem. This entails assisting customers in getting acquainted with the products or services, assisting them with the initial setup and configuration, and making sure they have the confidence and authority to use the platform efficiently. To further the strategic goal of the onboarding process, the team tries to increase customer adoption, reduce churn rate, focus on delivering value to customers and attaining measurable outcomes that contribute to the organization's overall success.
- The role and responsibility of the team. Again through the interaction and understudying the onboarding team, I found out the following about the team.
 - Proactive engagement: the team demonstrated a proactive approach to engaging with customers and guiding them through the onboarding process. When customers contact them, they respond quickly and offer prompt help and support.
 - Knowledge and Expertise: when it comes to the company's products and services, and onboarding practices, the members of the onboarding team exhibited a high level of knowledge and expertise. They were able to address customer queries, questions, and concerns effectively and provided valuable insights and recommendations.
 - Collaboration and Coordination: to ensure that there is a smooth and coordinated customer onboarding experience, teamwork and effective collaboration among functional team was evident. For example, there was regular communication and meetings among the development team to share updates, address challenges, and align on priorities.

3.2.2. Weakness/Inefficiency in the onboarding team

- Functional teams working in silos. Cross-functional team collaboration (among sales, estimators, planners, developers, and customer care) is not efficient due to miscommunication. This is a problem that affects the onboarding team by frustrating and creating inefficiency in their work and subsequently affect the service quality the customer receives because each customer has a unique workflow and lack of information among the teams in any way affects the CX.
- Lack of visibility into customer progress after the initial onboarding. Hemlock Printers' onboarding is an ongoing cycle where, while new customers are seeking to create a simple new template for their products, others are seeking to enhance their existing templates, add new products and services and integrate more customizations. This cycle has multiple requirements, documentations, teams, processes, and dependencies involved and multiple customers are onboarded during this period making it challenging to remember everything if cross-functional teams' collaboration, communication and documentation are not in a functionable manner.
- Issue of what customer information to transfer at a point in time and who is responsible for sharing. This issue has left a gap in knowledge on customer data and greatly influences teams' efficiency and negatively imparted the experiences of customers.
- Omission or ignorance of procedure and limited knowledge of some teams on the documents, structure, and procedure for gathering customer data lengthen the onboarding process for some customers. This eventually affect the entire onboarding process even for other customers on some occasions.

3.2.3. Summary

While the teams within the onboarding team try their best to work as efficient as they can, having a cross-functional collaboration and cooperation, establishment of a communication and document management system that enables easy search and retrieving of customer data is important to the teams' effectiveness and efficiency.

3.3. Onboarding Documentation

I examined the onboarding documents used during Hemlock Printers' customer onboarding process. In my analysis, I found that the onboarding document supports the process significantly. The documents guide both Hemlock Printers' onboarding team and the customer through the initial interactions and set the tone for all future engagements.¹ The onboarding document helps to reduce scope creep and makes teams assignments more efficient.

Reviewing an organization's documentation on customer onboarding should be a structured process that involves thorough examination and assessment of various aspects of the materials. In this case, I evaluated Hemlock Printers' documentation by assessing its Accuracy, Clarity, Relevance, and Engagement (ACRE) to ensure comprehensive review standards. This evaluation criteria is briefly explained below

A – Accuracy: Assess the accuracy of the information provided in the documentation. That is the reliability, truthfulness, and correctness of the information in the documentations. C – Clarity: Evaluate the clarity of the documentation in terms of language, formatting, and organization. R – Relevance: Consider the relevance of the documentation to both the target audience and the teams, and their specific needs and objective. E – Engagement: Assess the level of user engagement facilitated by the documentation.

Customer onboarding documentation encompasses a variety of materials, including user guides, tutorials, service contracts, FAQs, and knowledge bases etc. These resources serve to orient customers, reduce friction in adoption, and empower customers to derive maximum value from the product or service. Well-crafted documentation can enhance customer understanding, increase product usability, and foster positive perceptions of the organization.

Also, for the onboarding team, the documentation reflects the needs of the customer in a way that gives them thorough knowledge of customers' needs, preferences and expectations that helps them to understand each customer's unique

¹ <https://www.filecenter.com/blog/how-and-why-to-create-a-customer-onboarding-document/>

pain point to provide the needed support during the onboarding process. Understanding what the customers define as value gives insight into what the customers perceive as value and this helps with relationship development and subsequently, improves the CX. The knowledge gained equips the various onboarding teams within the onboarding process to know how to allocate resources and plan their tasks to ensure the client's experience is consistent and smooth.

3.3.1. Hemlock Printers' onboarding documents evaluation

In this section, I evaluated Hemlock Printers' onboarding document based on the ARCE framework I developed. The onboarding documents I identified in Hemlock Printers consist of the following: 1) legal documents (service agreement); 2) service and product offer/information (customer questionnaire); 3) Welcome package (product demo and tutorial); and 4) FAQs. These documents help to establish the parameters of the relationship between Hemlock Printers and the customers.

3.3.1.1 Customer onboarding questionnaire

The questionnaire review focused on the relevance of questions, clarity and conciseness of questions, and customization and flexibility. The questionnaire effectively captured important information about the customer's needs, preferences, and expectations. This enables Hemlock Printers to tailor its onboarding process to individual customer requirements. Also, the questions were found to be clear, concise, and easy to understand, allowing customers to easily participate and complete answering the questions. Further, the questionnaire demonstrated flexibility and customization options, allowing for adaptation to different customer segments or use cases.

3.3.1.2 Service agreement

The service agreement was found to be clear and transparent, outlining the terms, conditions, and obligations of both parties in understandable language. The agreement covered key aspects such as pricing, payment terms, service levels and scope, warranties, and liabilities, providing customers with a comprehensive understanding of their rights and responsibilities and data security and privacy. The agreement was deemed to be legally compliant, adhering to relevant laws and regulations governing contracts and consumer protection. On data security and privacy, I found robust

measures put in place by Hemlock Printers to safeguard customer information. Sensitive information is protected in part by data encryption protocols, and access controls. In simple terms, Hemlock Printers is dedicated to protecting client data from threat and vulnerabilities. They emphasize this commitment by suggesting continuous monitoring and system upgrades.

3.3.1.3 Product demo and tutorial

I found Hemlock Printers has a well-organized and interactive product demonstration and tutorial session that provides the customer with relevant and detail information on their products and services including contact information, communication channels, troubleshooting tips and FAQs available to the customer. This session offers new customers insightful information and opportunity to learn more about the product or service directly from Hemlock Printers representatives. This session offers visual demonstrations of key features and functionalities of customer accounts and platform.

3.3.1.4 FAQs

The frequently asked questions and answers identify were on Hemlock Printers website and the online ordering portal or platform created for customers. The information was very informative and well presented. On the website, the information includes how a customer can prepare their files for printing, print finishing and how to get a quote. On the ordering portal, the information includes how to make purchase through the ordering portal, how to secure one's account, how to track purchases etc. These provide the customer with some support in navigating through the ordering portal and submitting required documents that will help the customer get quick responses.

3.3.2. Weakness/missing documents

Although the specific documents and resources needed during onboarding may vary depending on the nature of the product or service, the target audience, and an organization's onboarding strategy, however, the following documents are documents one would expect Hemlock Printers with the aim of optimising the onboarding process to become more effective and efficient, would consider having.

- Onboarding checklist — the onboarding checklists outline the steps and tasks that new customers need to complete to successfully onboard onto the platform

and service. Checklists help users track their progress, stay organized, and ensure they don't miss any important steps. It also helps the onboarding team to be in sync with the customer on what to do and when to get them done. It helps to prevent errors and lays out the steps in a logical and precise manner for an effective workflow. It includes the time for the entire onboarding process to ensure an efficient process.

- Persona and market segment — this is a document describing the targeted audience and market segment. It provides details such as the goals and pain point of customers, their preferred channel of communication, their characteristics etc. This helps an organization to provide more tailored products and services and set the onboarding team on the path of success in making the process welcoming and more personalized.
- Welcome letter — contain personalised messages based on the customer's preference and interest. It tells the customer more about the organization and gives them some expectation on the services to receive.
- Onboarding FAQs — Frequently asked questions and answers provides the customer with self-service and less contact for help. The onboarding FAQs enable customers to easily find information and answers to their questions without having to contact an organization on simple information regarding the onboarding process.

3.3.3. Summary

Having a complete required document during the onboarding process is a requirement for Hemlock Printers as it seeks to enhance its customer onboarding experience. Access to the right documents helps during the process to facilitate speed and accuracy when onboarding customers. Even though Hemlock Printers did not have the documents identified above, as part of my review process, I develop some of these documents and the details are in chapter 3.

3.4. Customer Retention Rate Analysis

This section presents the findings of the Customer Retention Rate Analysis (CRR) I conducted for Hemlock Printers, which focuses on the effectiveness of customer retention strategies during the onboarding process. The analysis here aims to offer insights into customer loyalty, customer satisfaction and customer retention rate.

An organization's ability to retain consumers is crucial, especially during the onboarding process when users are forming their first opinions and deciding whether to stick with the product or service. In order to find areas for improvement, the analysis assesses important metrics and variables affecting customer retention. Customer retention rate pertains to the percentage of customers that a business keeps over a given time frame. It is a crucial indicator of consumer satisfaction and loyalty. A high rate of customer retention suggests that users are satisfied with the good or service and are probably going to stick with it in the long run.

Since it is usually more expensive to acquire new customers than to keep existing ones, customer retention plays a crucial role during the onboarding process. Effective onboarding can provide a strong foundation for long-term customer relationships by ensuring that customers understand how to use the product or service and derive value from it. The objectives therefore in this part of my work were to:

- evaluate the total rate of customer retention during the onboarding process.
- determine the variables that affect customer churn and retention.
- make recommendations where necessary for enhancing customer retention tactics.

My CRR analysis involves the following steps:

Here is the formula:

$$CRR = \frac{\left(\text{number of customers at the end of the period} - \text{Number of customers acquired during the period} \right)}{\text{Number of customers at the start of the period}} \times 100$$

Where, number of customers at the end of the period was = 145

number of customers at the start of the period is = 139

number of customers acquired during the period = 6

$$\text{CRR} = 145 - 6 = 139 \div 150 \times 100 = 93\%$$

For Hemlock Printers, the timeframe for measuring the retention rate was from December 2022 to July 2023. The total number of customers used for the analysis was 150 online customers. Data gathered were customers' information from multiple databases and websites used by Hemlock Printers for their services — PrintVis, Client Vault, uStore and Presswise. The information gathered include the date when customers were onboard, billing methods, order, or purchase history etc. I used Microsoft Excel to compute and analyze the data gathered.² Using the customer retention formula for calculating Hemlock Printers' online customers retention rate, from 2022-2023, the number of customers at the end of the period was 145, the number of customers acquired during the period was 6 and the number of customers at the start of the period was 139. 93% online customers were retained implying majority of the customers acquired still patronize Hemlock Printers' products and services. This is an impressive achievement as the average retention rate for manufacturing industry of which printing companies are considered a part of, has an average of 67%³. This high retention rate could be attributed to many factors including automation of workflow, quality customer support team, pricing, social engagement, convenience etc.

Although Hemlock Printers strived to get high retention rate, there was some churn. To calculate the churn, the total number of customers lost during the period must first be determined. This includes customers who churned (i.e., stopped using the service) and those whose accounts became inactive. Total customers lost = Customers at start + Customers acquired - Customers at end + Inactive customers.

Where, number of customer at the end = 150

number of customers at the start = 139

number of customers acquired = 6

Total customers lost = 139 + 6 - 150 + 10

Total customers lost = 139 + 6 - 150 + 10

² Zekeriya Mulbay, "Customer Retention Analysis: Excel/Google Sheets Data Analysis" Marketing Analysis. Northstar Analytics. January 6, 2023. <https://northstaranalytics.co.uk/customer-retention-analysis-excel-google-sheets-data-analysis/#:~:text=Using%20Excel%20or%20Google%20Sheets,effective%20strategies%20to%20retain%20them.>

³ <https://www.shopify.com/ca/blog/average-customer-retention-rate-by-industry#>

Total customers lost = 155 – 150

Total customers lost = 5

The formula for calculating the churn rate is:

$$\text{CHR} = \frac{(\text{Total customer lost})}{\text{Number of customers at the start of the period}} \times 100$$

Where, number of customers at the start of the period is = 139

number of customers lost = 5

$$\text{CHR} = 5 \div 139 \times 100 = 3.6\%$$

This percentage means that, Hemlock Printers lost almost 4% of its customers during this period. Even though losing customers in business is certain, I believe with much efforts, the percentage can be less.

Complementing these findings with a qualitative review of the data, I made some observations including the following:

- from January to July 2023, there were 31 customers who had not made any purchase.
- The volume of purchased made by 1/3 of customers were 50% less that previous year.

This further explain the fact that, although there has been high customer retention rate, Hemlock Printers needs to put in more effort to further understand factors that influence the customers purchasing behaviour. With this understanding, strategic effort can be made to encourage the retained customers to make more purchased.

Based on the review and analysis, I realized that, while there are documents and tools available for the onboarding process, there was the need to update and upgrade the content of these documents to fully achieve the onboarding goal. Also, while the teams understood their roles, there was the need for more collaborative work; syncing of systems to enable the teams to work more efficiently and effectively because inconsistency in service quality due to gaps in the onboarding teams' knowledge may

eventually affect the customer retention. In addition, the current customer retention rate is higher but can be better with improved CX.

3.5. Chapter Summary

In summary, customer relationship development begins right from the onboarding stage and having a process that makes the customer experience value involves strategically planning the process and ensuring the onboarding team understand the customer value and facilitate seamless process using the right documents and resources.

Chapter 4: The Process of Developing Hemlock's Customer Documentations

The review of Hemlock Printers' onboarding process and documentation revealed some limitations within the process and documentation as stated earlier in chapter two. This limitation hindered the full success of the onboarding process. Therefore, stemming from the documents identified and reviewed in chapter 2, I reorganized some existing documents and developed additional document. In addition, I officially mapped out the customer journey of which the onboarding process forms an integral part. I mapped out the process to understand the stage where the onboarding process begins and end to be able to review the process effectively. This chapter therefore focuses on the following:

- reorganization and development of additional document to complement the existing onboarding documents
- identification and mapping of the customer journey

4.1. Development of Addition Documents

To ensure the onboarding process is smooth with an onboarding experience that makes customers believe in the ability of Hemlock Printers to deliver on its promises made during the sales process, I reorganised the customer questionnaire and service agreement and develop the welcome letter. The service agreement and the questionnaire needed to be reorganized to ensure they convey the intended purpose for their use during the onboarding process. Armed with the understanding of the entire project of optimizing the onboarding experience, I reviewed literature to understand the elements that must be in the content of these documents in relation to the printing industry and Hemlock Printers' goal for the onboarding process.

4.1.1. Customer onboarding questionnaire

Beginning with the customer onboarding questionnaire, I reorganised the document to ensure the questionnaire entails the following:

- questions considered required customer data that would help the onboarding team and customer support team in providing the customers with the desired onboarding experience.
- detailed the scope and services to be provided to the customers.
- helped in gathering relevant information sufficient that will help with customizing products for the customers' needs and also serve the purpose of Hemlock group of Companies in time when the other organizations in Hemlock's services are required.
- the transition of customers from onboarding to the next phase within the customer journey is smooth because the information gathered would also serve as official information on the customer's needs.
- the data gathered can become a documented reference for tracking performance and implementing strategies where necessary.

Based on this understanding, I reorganised the document according to a structure as seen in Figure 3. The customer's preferred primary contact person's details; services and products required from Hemlock group of Companies, the workflow and client's brand unique features, billing details, shipping details; general expectation, and quality assurance or other unique requirements the customer wants from Hemlock Printers.

Client Onboarding Questionnaire

Welcome! This onboarding questionnaire will help in collecting important information to ensure your company transitions smoothly to Hemlock virtual portal for placing your orders and enjoying our services. Please fill out the form and return it with all needed attachments to Hemlock Customer Care Manager [insert email address]

Client/Program Details

Company Name: _____

Address: _____

Primary Contact details

▪ Name: _____

▪ Email: _____

▪ Phone: _____

▪ Role/title: _____

Form Submission Date

Note: Your primary contact is responsible for the following:

- Approving template changes for the online portal
- Authorizing any change on the portal
- Requesting for addition of services or products
- First point of contact to your organization/front line support.
- Managing your company's print program

Online Portal Information

Users

Attach an excel sheet with the following information:

▪ Full Name

▪ Title

▪ Location

Note: Users would have access to the online portal to place orders and request changes once the primary contact gives approval.

- We can pre-configure them on the system once its setup and assign login

Items

Indicate which of the following you would want available on the online ordering portal. Please attach an excel sheet of complete detailed lists with supporting specification and the kind of quality you expect as an ordering option for each item.

Business Cards

Notepads

Flyers

Letterheads

Brochures

Others

Branding

Please note the following and provide as an attachment.

▪ Packaged artwork for all items required for the online ordering portal.

▪ Sample content to demonstrate the variable content that would be entered by users.

▪ Your brand style guide, fonts, logo with transparent background, and other brand identity elements required.

Shipping Details

Location

Attach an excel sheet of all locations you would want us to be shipping your orders to. Include the following details:

▪ Complete address

▪ Special delivery instructions for each location (e.g., receiving hours etc.)

Storage Details

- Inventory
State any existing inventory items you would want us to transfer to our warehouse for ordering and indicate any guidance/instructions on anticipated volume monthly, quarterly or annually.
 - _____
 - _____
 - _____

Billing Details

- Invoicing
Please indicate preferred option
 - Process invoice per order
 - Process invoice monthly with itemized list per order
 - Process invoice monthly with itemized list per location
- Reporting
Please state any specific inventory management or reporting requirements
 - _____
 - _____

Production Details

- Pre-launch Production
Indicate and attach order(s) if you require any materials production prior to the online order portal launch.
 - Yes No
- Post-launch Production
Indicate and attach order(s) if you require any backlog of order(s) placed once the online order portal is launch.
 - Yes No

General Information

- Quality Assurance
Please state any specific requirements/expectations outside of general order processing and tracking that would improve the quality of service we would offer you.
 - _____
 - _____



Figure 3: Hemlock's Customer Onboarding Questionnaire

4.1.2. Service agreement

For accountability and relationship management, Hemlock Printers has written agreements between them and their customers. The agreement helped to secure Hemlock Printers against any liability and sets the scope for the service to be provided to its customers. Most importantly, it serves as a reference point for the services to be provided. After reviewing the agreements, I reorganized them into a single document. In so doing, I ensured the customer service agreements included the scope of the product and services to be provided, stated deliverables, the key point indicators and tasks to carry out to be able to produce the deliverables, prices for each service and product, details of liabilities, other relevant details, dates of the agreement and the parties involved as well as definition and limitations of the agreement.

4.1.3. Welcome letter

As stated earlier, Hemlock Printers had no welcome letter for their online customers. Therefore, I developed the welcome letter shown in Figure 4. The welcome letter is intended to serve as the first official welcome message for customers to have from Hemlock Printers. It will help to establish a positive relationship crucial for completing the onboarding process and for future transactions. After a successful consideration and contract signing, an official welcome letter which contains warm welcome of the customer with an overview of the organization and how the customer choosing to do business with Hemlock Printers is very significant to the development and growth of Hemlock. The letter contains helpful tips, resources for the customer and how the onboarding process would progress. This information in the welcome letter is to help the customer to know what to expect from Hemlock Printers during the onboarding process and relationship development. It is also to help to officially introduce the customer to various teams within Hemlock group of companies.

Welcome Letter

To: [Client/Store Name]
From: [Hemlock Enterprise Solution]
Date: [Month, Day Year]
Subject: [Welcome [Client Name/Store]

It's a pleasure to have you on board. Welcome to Hemlock!
Hemlock was established to be the printing hub for people/organizations' print needs. As one of the best North American Printers, we pride in the sustainable printing practices, the variety of products/services we offer and the print quality we guarantee our clients.

Thank you for placing your confidence in Hemlock for your printing products/service. We are pleased you have chosen us. Our friendly and knowledgeable staff would consistently support your journey with us to ensure you feel confident turning to us for all your current and future printing needs.

To assist you in making the most of our service, please take some time to review your onboarding schedule [include the timelines here/next step of their journey] and helpful resources [include resources/tools they may need].

If you have further questions/request, you can contact [insert name/email/number of people to contact to help them on the next step].

We live up to our purpose, we constantly improve upon our technology, products, and services. You can take a quick look at our website [insert website URL] and follow us on LinkedIn [insert link] and social media [insert links].

We will be in touch! Enjoy your journey with us.



Figure 4: Hemlock Customer Welcome Letter


4.2. Customer Journey Mapping

As indicated in chapter one, the customer journey is a crucial aspect of an organization's business. The journey encompasses the stages the customer goes through to right from the start to the end where the customer possibly becomes an advocate for the organization. While the main focus in this report is on customer onboarding, onboarding is a significant aspect of the customer journey. The goal therefore in this section is to map out the various stages in Hemlock Printers customer journey to understand when the onboarding starts and ends. However, to identify and map out the journey, I had to first know who Hemlock Printers' customers are, what their needs are, and how they interact with Hemlock Printers' business offerings. This understanding informed how I reviewed the customer journey to understand the onboarding process.

Based on my understanding of Hemlock Printers' customers after enquiring and evaluation of databases, I identified Hemlock Printers' online customer segments as seen in Figure 5. The segmentation gave detailed representation of the type of customers Hemlock Printers has. It also helped me to anticipate consumer reactions to Hemlock Printers' business offerings. Segmentation is a strategic tool used by organizations to categorize customers by their common needs and recognize profitable customers in order to manage the organization's resources efficiently.⁴

⁴ Mosaddegh, Abdolreza, Amir Albadvi, Mohammad Mehdi Sepehri, and Babak Teimourpour. 2021. "Dynamics of Customer Segments: A Predictor of Customer Lifetime Value." *Expert Systems with Applications* 172: 114606. <https://doi.org/10.1016/j.eswa.2021.114606>.

HEMLOCK'S CUSTOMER SEGMENTS


 Hemlock Printers
 06-15-2023

**Customer Segments
for Customer Journey**

Stakeholder:

- Customer Care team
- IT/Development team
- Production team

Goal/Aim

This user segmentation is to help identify Hemlock's customers and map out their customer journey with Hemlock to help in enriching their experience. The segmentation will mainly be used for mapping out the customer journey.

Customer Base

Hemlock's customers consists of B2B B2C

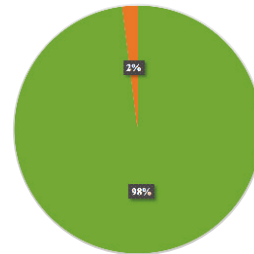
This segment is created due to each groups purpose and offerings available to them. In order to obtain these segment, I considered Hemlock's existing customer base and potential customers of a printing organization like Hemlock.

Action Plan

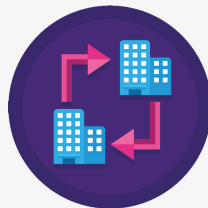
- Develop customer journey map
- Concentrate resources on professional channel and strategies that would enhance customer experience and increase stakeholder's efficiency.

Customer Base

- B2C
- B2B



B2B



B2C



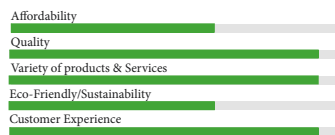
"I want to be able to buy print for my employees and my business"

- 1-50 years old businesses
- Requires print stationaries
- Need printed products for ads
- Need printed products to see to my clients
- Need ease with purchasing of print products and services
- Buy mostly for both internal use

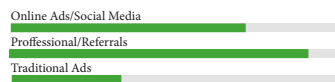
Frustration

- Do not want to always be bordered about out of stock stationaries and print products
- Do not want to buy print products/services from multiple service providers
- Worried about delays in getting products for programmes

Motivation



Prefered Channel



"I need a print service provider who can serve me and my clients"

- 1-10 years old business
- Wants to print, store and a portal for clients to place their order all within one print service package
- Want to only publish my materials and the print provider ensure it gets to the clients
- Willing to try any suggested service to enhance sales
- Buys services mostly for clients

Frustration

- Dislike delays in clients getting the products
- Do not want to buy services from multiple service providers
- Worried about bad review of services

Motivation



Prefered Channels



Figure 5: Hemlock Printers' Customer Segments

Segmentation of the customers into the two categories gave me a better understanding of the customers and helped with the characterization of the customers' purchasing behavior.⁵ The segmentation was based on existing customer data and my experience interacting with the customers and working with the onboarding team. The outcome of the segmentation is usually dependent on the kind of data reviewed, that is, whether geographical, psychographic, demographic, technographic, need-based, value-based etc. In the case of Hemlock Printers, the data reviewed was more on value-based segmentation. The value-based segmentation is a B2B segmentation approach that helps an organization to know the value customers get out of its business offerings. By evaluating customers in terms of the revenue they generate (purchasing history) and the costs of establishing and maintaining relationships with them (number of resources spent on the customers), I identified Hemlock Printers market segment.

From the evaluation, I identified that, Hemlock Printers has two main customer segments. That is, Business to Business (B2B) customers and Business to Customer (B2C). The approach used to identify these segments enabled me to know the size, the products, and patterns in each segment. The B2B customers of Hemlock Printers comprise of companies with need for various print products and services. The B2B customers aim for a single print provider with technological resources to produce, store and ship whenever they need them. Their main motivation for these companies doing business with Hemlock Printers is the variety of services and products offered, the quality of print, sustainability, the pricing and most importantly the experience in relating to Hemlock Printers. The ease of getting a print service provider with the capacity and the resources to meet their needs is the motivation for these B2B customers to work with Hemlock Printers. These customers usually depend on good referrals and experiences as well as the sustainability of the services they hope to receive.

The B2C customer segment of Hemlock Printers, on the other hand, consists of companies or individuals who want a print service provider who can produce, store their print products and ship directly to their clients. These customers have contracts with Hemlock Printers to print their products, create an account for their clients to directly

⁵ Wu, Rong-Shiunn, and Po-Hsuan Chou. 2011. "Customer Segmentation of Multiple Category Data in e-Commerce Using a Soft-Clustering Approach." *Electronic Commerce Research and Applications* 10 (3): 331–41. <https://doi.org/10.1016/j.elerap.2010.11.002>.

purchase from Hemlock Printers ordering portal and ship directly to the clients without any intervention from the customer(company). The B2C customers want Hemlock Printers to serve as their printer and a print broker between them and their clients.

The insight into Hemlock Printers' customer segments helped to review the customer journey with an understanding into what value is created for the customer and how to maximize that. Although each customer has its own unique interactions with Hemlock Printers, there are some similarities based on the various touch points in Hemlock Printers' business offerings. As I identified the customer journey, I mapped it to help visualize the stages, motivation, pain points, stakeholders and documents required within the journey. The journey map serves as the roadmap to plan and implement any strategy to enhance the CX and drive growth that will increase the retention rate.

I identified four major stages and various touch points from pre-purchase to post-purchase as seen in Figure 6 in Hemlock Printers' customer journey. These stages were identified based on the core activities and decisions that needs to be made during Hemlock Printers' customer journey. Identifying the stages and each touch point gave me a better understanding of the journey. The stages were divided into four stages to ensure each stage is short with only the required information and activities taking place without burdening the customers.

Hemlock Customer Journey Map

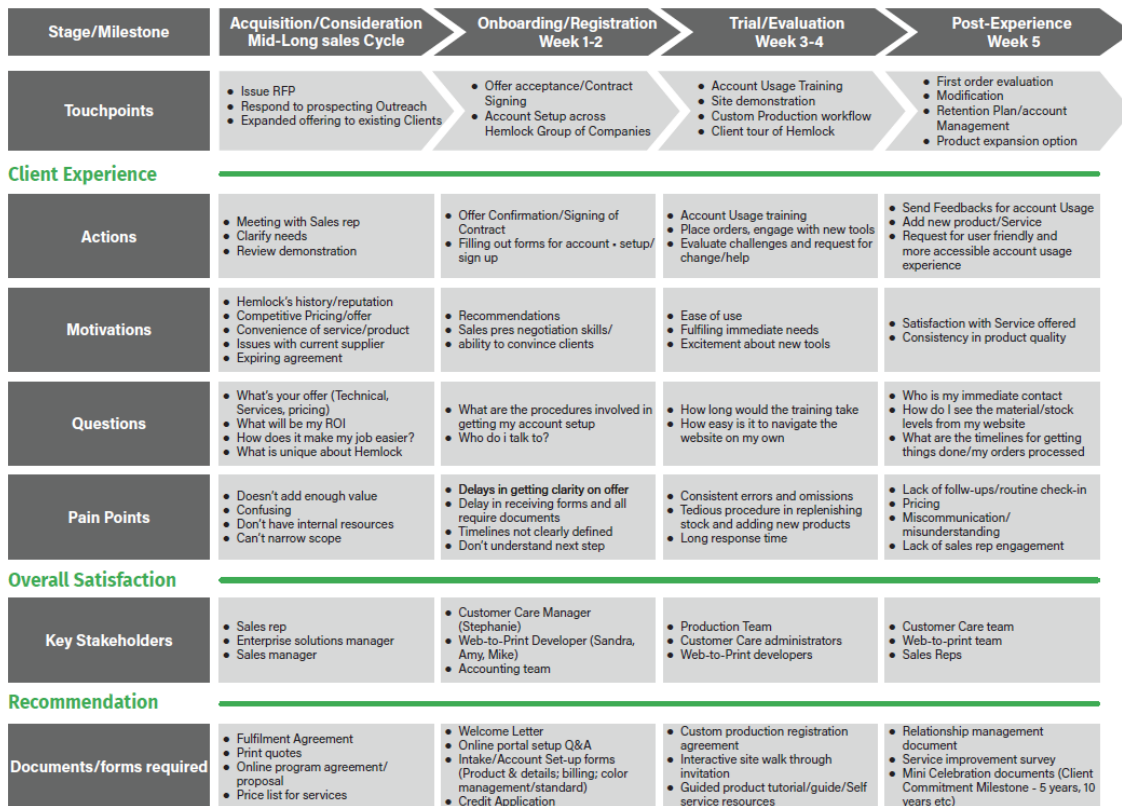


Figure 6: Hemlock's Customer Journey Map

The journey map shows the elements that constitute the anticipated experience which include the customer's required actions to take at each stage, their motivation for moving to the next stage, the possible questions they would be asking at each stage and their pain point. This helped me to visualised and gain some insight into the customers' motives and emotions that informs the possible experience the customer gets during the journey. There were also stakeholders or teams involved in each stage as well as required documents that were identified to ensure smooth transition to the next stage. The stages within Hemlock Printers' customer journey include the Acquisition or Consideration stage, Onboarding or Registration stage, Evaluation stage and Post-purchase stage.

The acquisition or consideration stage is basically the introduction stage. The customer is introduced to Hemlock Printers' business offerings through Hemlock Printers' advertisements, educational programs, social media, or referrals etc. The

customer at this stage has a pain point or a print need, and possibly looking for a solution. This introduction just helps the customer realize that there is a solution for their print needs if they are possibly thinking of a print solution. The customer then reaches out to Hemlock Printers for their print needs or reviews Hemlock Printers' offers made through its sales representatives. The customer makes the decision on which product or service to purchase from Hemlock Printers, provided they are considering Hemlock Printers to be their print provider. And to make that decision, they would have considered their pain point, have their questions answered and be motivated to take the action of choosing Hemlock Printers as their print provider.

The second stage is the onboarding or registration stage. The customer at this stage has made the decision to choose Hemlock Printers as their print service provider to provide them with some products or services. The onboarding process is a major stage that begins with a kick off meeting to elaborate and understand the customers' needs. The onboarding process has eight steps the customer must complete to be considered onboarded. This is the stage where all requirements from the customer are agreed on and they provided the necessary documentation to get their account setup with Hemlock Printers. The customer is officially welcome into Hemlock Printers. The team responsible for setting up the customer then begin their work with the information provided by the customer and get the customer setup. As the setup is complete, the customer is walked through how to use their account and gets started by making their initial purchase.

Having completed the onboarding process, the customer then moves to the evaluation stage where their initial purchases are reviewed, and changes are made hen troubleshoot. The customer then makes subsequently purchases and reach out the customer support team whenever need be to ensure smooth journey. Changes and updates are made to the customers' accounts as and when need be, to ensures the accounts works as expected.

The final stage is the post-experience stage. After some transaction between the customers and Hemlock Printers, the customer after a period may decide to continue to do business with Hemlock Printers or not. This decision is partly influenced by Hemlock Printers' retention strategy such as striving for excellent purchasing experience, continuous evaluation of the onboarding experience, easy customer care accessibility,

pricing etc. It is also the stage where the customers may trust Hemlock Printers and become an advocate in promoting Hemlock Printers' business offerings to other potential customers.

Identifying the customer journey was significant to the onboarding processes because it helps to understand the goal of onboarding and its significant to the journey. It also helped me in reviewing the onboarding and making suggestions that will align with the customers' expectation. The insight drawn from the customer journey map helped to identify which point of the onboarding process needs more improvement in order to curtail missed customer expectations and incomplete customer onboarding.

Chapter 5: Summary, Conclusion and Recommendation

5.1. Summary

This chapter provides a brief summary of key findings, offers insights drawn from the analysis and proposes actionable recommendations that could impact positively on Hemlock Printers' onboarding activities.

For a strategic review, I used the ACRE framework I developed to review the onboarding documents; customer retention analysis and observation to review the onboarding process and the team. Hemlock Printers as a print service provider, has a unique onboarding process for the online customers because the online service provided is secondary to its main print and warehousing business. The online service is a complementary service provided to customers with print-on-demand needs and not a full ecommerce service provided; therefore, its onboarding process does not follow the process of a typical online retailer.

For onboarding documentations, the report identifies the presence of essential document such as legal agreements, service and product/information, a welcome package including product demos and tutorials, frequently asked questions (FAQs). However, it highlights the absence of certain crucial components necessary for a comprehensive onboarding process. Among the key components that were missing from Hemlock Printers' onboarding process are onboarding checklist, personas and market segments, a welcome letter, and an onboarding specific FAQ. These documents, some of which I had to developed for Hemlock Printers, will play critical roles in enhancing the effectiveness and efficiency of the onboarding process, ensuring that customers receive personalised and relevant information, guidance, and support as they begin their journey with Hemlock Printers. To complement the existing documents, I developed a sample welcome letter and mapped out the customer journey.

Hemlock Printers' customer retention rate (CRR) calculation shows significant findings within the industry context. The CRR show that Hemlock Printers achieved a remarkable 88% customer retention rate. This means that Hemlock Printers successfully

retained 88% of its customers over the studied period, surpassing the industry standard of 67%. The churn rate of 3.6%, however, indicates that Hemlock lost almost 4% of its customer base during the period under review. This metric is crucial for understanding the rate at which customers discontinue their relationship with Hemlock Printers, providing important insights into customer retention efforts and overall business performance.

The report also shows that the onboarding process has been strategized in way that will ensure seamless transition. Each step designed to ensure the process is not lengthy, it has clear instructions and documentations, customer security is not compromised and it's free from technical issues. Customer onboarding challenges leads to unsatisfied customers and increased churn rate and from the retention rate of Hemlock Printers, it indicates Hemlock Printers has put in a lot of effort starting from the onboarding to retain customers. However, as customer churn is paramount for every business, Hemlock Printers also had lost some customers. This knowledge on the process however can help Hemlock Printers to put in strategies to reduce the churn rate starting with the onboarding process.

As for the onboarding team, the report identified their significance in the onboarding process and factors that influence their effectiveness. The report shows the team forms an integral part of the onboarding process because, they facilitate the customer transition and equip them with the right resources. Some factors identified that influence their efficiency and effectiveness includes, the teams' understanding of the customer onboarding goal, their understanding of their roles and its significance to the success of customer onboarding, communication, and collaboration among cross-functional teams. Some weakness noted with the onboarding team includes functional teams working without sufficient communication that will make work more efficient and the lack of free flow of essential data for onboarding. To truly achieve the desired benefit of successful onboarding, these issues must be critically addressed because the readiness of the team to onboard customer is dependent on available resources and knowledge.

5.2. Recommendation

Customer onboarding, when done right, sets the stage for an excellent long-term customer experience. However, neglecting this transition between acquisition and driving engagement leads to missed opportunities and damaged relationships. In addition to the improvements made to the Hemlock Printers' documentation, Hemlock Printers could make additional changes to its onboarding experiences through the following outlines recommendations.

To improve the function and accountability of the onboarding team, the following recommendation could be considered:

- Hemlock could establish a formal training program to guarantee uniformity in knowledge and skill levels among new hires within the onboarding team.
- Hemlock could invest in ongoing professional development and training opportunities for the onboarding team, for them to stay abreast with industry trends, standards, and best practices.
- Teams could be tasked with ensuring the findings or information from measuring the onboarding experiences are put into use or strategic decision making.
- Hemlock could invest in technology that foster employees' efficiency and speed as well as customer convenience and seamless transactions.
- Teams with important information to enhance the onboarding experience should frequently communicate across teams for effective and efficient process. Proper knowledge transfer is significant to a successful customer experience.

To foster seamless onboarding process, the following recommendation could be considered:

- Hemlock could use a system of tracking customer satisfaction metrics and feedback in order to spot patterns, fix problems, and improve the onboarding process.

- Customer experience goals for each stage of the customer journey could be set, communicated to all teams, and reviewed frequently to ensure they are achieved and modified when necessary.
- Hemlock could set short- and long-term achievement plans for each customer to optimize their experience to drive growth and advocacy.

5.3. Conclusion

The printing industry, just as all customer-driven industries, survives on the quality of customer experience it provides. In an increasingly digital world, printing organizations cannot rely solely on the core service of producing print materials but must augment it with a holistic, seamless customer experience. The printing landscape is competitive, and customers have high expectations shaped by experiences from other industries. Therefore, optimizing customer experience in the printing industry must start from the first contact with customers. Streamlining the onboarding experience begins with a helpful onboarding process complemented with documentation and supportive onboarding team.

Most printing organizations including Hemlock Printers take proactive measures by providing customers with pre-set templates, automated workflows, centralized ordering and print platforms that reduce too many back-and-forth. They also provide guidelines on file preparation as well as exceptional print quality, fast turnaround times, and creative solutions. However, customer experience is a never-ending cycle that encompasses end-to-end services and relationship-building, and each customer's interaction at all stages must be well planned and managed.

As customer expectations rise across markets, printing organizations must continually improve their CX to build their brand value, create meaningful engagements, and earn referrals to remain viable. For Hemlock Printers, the onboarding process never truly ends but rather is a continuous cycle of learning and improvement for till the CX is optimised.

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