



# CUSTOMER ONBOARDING STORY

**Customer-centricity** is epochal at WebEngage. Every feature built in our marketing automation dashboard is based on continuous interaction with our customers. Similarly, providing irrepressible onboarding experiences to our customers is what we constantly aim for.

We don't celebrate and take a back seat once a lead converts. Instead, we start celebrating along with the customer once the onboarding process is completed. And continue to do so throughout the customer lifecycle. Our idea is to ensure a highly memorable onboarding as well as overall experience to our customers.

Take this celebration a step further **we'll now be sharing our customer onboarding stories with you. Here's bringing to you the first of the lot!**

But before we jump into the story, let's quickly understand what is onboarding and at which stage of the customer lifecycle does a user experience onboarding at WebEngage.

There are **four distinct stages of customer lifecycle at WebEngage: arrival, opportunity & closure, onboarding, and success & support.**

# THE 4 STAGES OF THE CUSTOMER LIFECYCLE @ WEBENGAGE

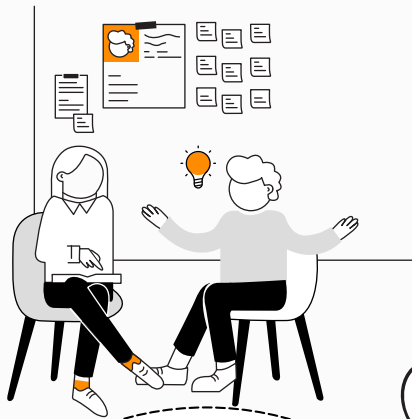
## STAGE 1 ARRIVAL

A **lead's first interaction** with WebEngage.  
(via demo sign up, resource download, referral, etc.)  
The **sales development team** then categorizes the lead as qualified or disqualified.



## STAGE 2 OPPORTUNITY & CLOSURE

The **sales and solution specialist team** gets in touch with a qualified lead (opportunity), understands their requirements and presents a customized solution. Once convinced, **the lead becomes a customer**.



## STAGE 3 ONBOARDING

The **customer starts using our marketing automation dashboard**, integrates multiple channels & mediums before executing their user engagement & retention strategy via the dashboard. The **onboarding experts** provide assistance at this stage.



## STAGE 4 SUCCESS AND SUPPORT

Then the **success and support teams** play a proactive role in **business growth** and **campaign implementation** respectively throughout the lifecycle.



## What is customer onboarding in SaaS?

Customer onboarding is the process of nurturing new users and helping them get acquainted with your product/service. This stage comes right after the lead becomes a customer and gets started with your product. Usually, it involves product tutorials, help documentation, and enhancing the user experience once they start using your product.

## Customer onboarding at WebEngage

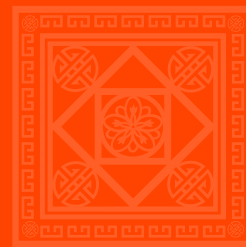
A survey with our customers revealed that about **63% of SaaS customers go away due to a poor onboarding experience.**

So, at WebEngage, we go the extra mile to make sure that our customers receive value from our marketing automation dashboard and achieve their desired goals. We've revisualized the conventional practice of onboarding being handled by customer success managers and introduced a dedicated onboarding team that aids the customers throughout the integration phase and ensures hassle-free, timed and extremely personalized customer onboarding experiences.

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Now that you're familiar with **onboarding** as a process, let's take a comprehensive look into this year's first onboarding story. **This is a story of India's emerging foodtech brand, EazyDiner.**





## About EazyDiner

EazyDiner is an instant restaurant table booking platform founded in 2014 by experienced hoteliers and restaurateurs including the celebrated journalist and food critic Vir Sanghvi, Rohit Dasgupta, Shruti Kaul, and Ahana Bhutani.

EazyDiner offers table reservation at 6000+ registered restaurants in Delhi NCR, Mumbai, Bengaluru, Pune, Chennai, Kolkata, Goa, Ahmedabad, Jaipur, Hyderabad, Chandigarh, Lucknow and Dubai on the EazyDiner app and website with guaranteed offers.

<b>Brand</b>	EazyDiner
<b>Industry</b>	FoodTech
<b>Founded</b>	2014
<b>Investors</b>	Saama Capital, DSG Consumer Partners, BEENEXT, Denlow Investment Trust
<b>Latest funding</b>	INR 41 crore
<b>Brand Properties</b>	Mobile and Web App (Android and iOS)
<b>Vision</b>	Friction-free table reservation for EazyDiner users
<b>Presence</b>	12+ Indian cities and Dubai
<b>Global recognition</b>	Best Restaurant Reservation App in India and Asia, 2018 by World Travel Awards

# EazyDiner's Onboarding Experience With WebEngage

Our idea is to make the eating out experience enjoyable, authentic and friction-free for every user. So we were highly skeptical about the integration aspect of WebEngage as we've had less than ideal experiences with other service providers in the past. But the onboarding team at WebEngage made the process a hassle-free and convenient. Important channels and mediums were integrated correctly and the entire integration process was completed within the assured timeline. I can vouch for the onboarding experience and expertise that WebEngage offers to its customers. I'm also excited to see how our integration with new channels (social media and WhatsApp) turns out to be!



**Ajay Bansal**  
VP Product at EazyDiner

## **Vision**

To provide the most enjoyable, authentic and friction-free table booking experiences with instant confirmation and offers to the customers.

## **Expectations and Challenges**

- Integration and support hiccups
- Data strewn across channels and mediums
- Precise Timeline
- Specific use cases
- Campaign Execution

## **WebEngage at work**

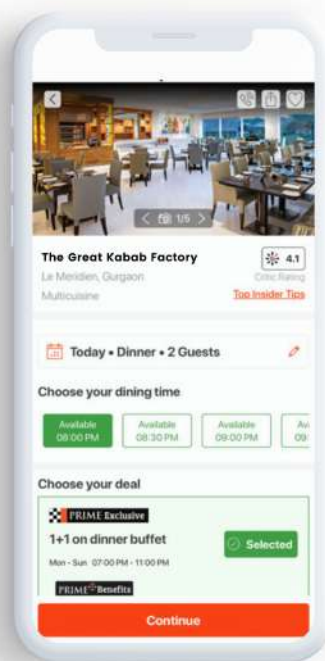
- Defined milestones/timelines
- Consolidated the user data
- Provided dedicated human assistance
- Solicited feedback at every level
- Simplified the use cases
- Introduced automated, cross-channel journeys

## EazyDiner's vision

"On average, **20 % of the seats in a restaurant go vacant everyday. On weekdays**, this number shoots up to **50-55 %**", said co-founder & COO of EazyDiner, Rohit Dasgupta in an interview with Business Today.

Considering the facts, EazyDiner decided to help diners make reservations at restaurants within minutes, and for restaurants to be able to offer and take bookings seamlessly.

But EazyDiner has a multi-sided business model. And stitching the complex, multi-sided data and sending most accurate, personalized campaigns to the users was challenging for EazyDiner.



**Users book tables** at registered restaurants on the **EazyDiner App**

To solve this, EazyDiner tried a couple of marketing automation tools before switching to WebEngage. But they weren't really satisfied with the onboarding experience. And when the start is rocky, the experience that follows is bound to be unpleasant. So before joining hands with WebEngage, the EazyDiner team had specific expectations and challenges to be taken care of.



# Challenges & Expectations

- **Integration and support:**

Integration was the most important part of the process as nothing moves forward unless the right channels, events, and platforms (like Google Analytics, CRM, etc.) are integrated with the marketing automation platform. So the EazyDiner team wanted to complete the integration process soon and without much hassle. But due to their past experience with other marketing platforms, they were

- **Data across multiple channels and mediums:**

Although EazyDiner wanted to send multi-channel communication to their users, their user data was strewn across channels, in silos. They were also using various tools including the CRM and social media. Integrating data from across these touchpoints and mediums was extremely challenging.

Additionally, **push notifications** are pivotal to their business - so EazyDiner wanted to have push notifications up and running without any glitches.

- **Precise Timeline:**

The business is in its important growth stage - so the team didn't want to go through a lengthy onboarding phase. They wanted the integration to be completed within 5-6 weeks.

- **Specific use cases:**

EazyDiner had a set of primary use cases - some also required specific integrations to be done.

- **Location-based targeting:**

A user looking for restaurants/offers in a particular area must get relevant communication about the restaurants in that area.



- **User targeting:**

Personalized communication must be sent to a set of users who did or did not do a specific event.

- **Multi-channel engagement:**

Depending on the user's past actions and behavior, relevant communication must be sent across multiple channels.

- **Campaigns:**

Based on the use-cases mentioned above, EazyDiner wanted to make sure that the execution of campaigns happened without consuming much of their human hours. They aimed at having their integration done in a manner that helps them plan and execute their campaigns easily and strategically.

# WebEngage at work

When the onboarding phase started with EazyDiner we stuck to a multitude of elements that ensured a customized, hassle-free onboarding experience for EazyDiner. Here's how we did it:

- **Aligned our team:**

Yes! We're talking about our team. As soon as EazyDiner signed up, we assigned an onboarding manager and a customer success manager to take care of the account. The managers conducted a kickoff meeting with the stakeholders at EazyDiner and deep dove into EazyDiner's use cases, expectations, and challenges.

- **Set the stage for EazyDiner's (customer) expectation:**

The managers then found the ins and outs of EazyDiner and promised an initial go live with a handful of use cases. So that EazyDiner can actually see if the integration is working fine and as expected. The onboarding manager also laid out a Scope of Work (SOW) which sets things clear and brings both the teams on the same page.

- **Defined the milestones/timelines:**

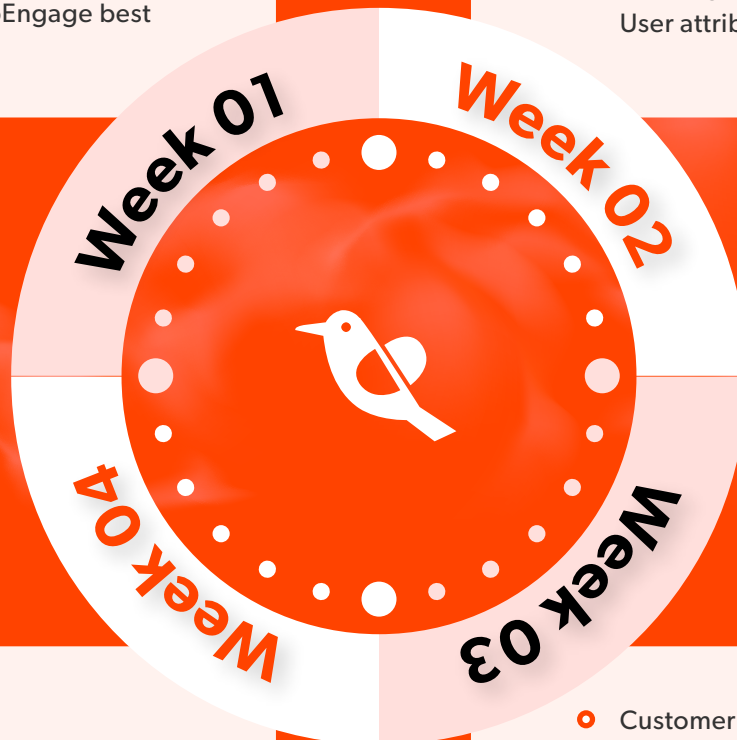
We mutually chalked out an onboarding plan that included deadlines for every particular thing. This helped in achieving the onboarding milestones and sticking to the turn-around-time (TAT).

The onboarding expert broke down the integration process in a four-week process.

# WebEngage's 4-week Onboarding Framework

- Kickoff call to discuss the strategy, timelines, integration architecture
- A walkthrough of the **onboarding kit**
- Details for getting started
- Account setup
- Defining data points, APIs & integration points
- Industry and WebEngage best practices

- Channel integration: email, sms, push, etc.
- DNS and authentication setup for all the channels
- Test channels to confirm the configuration: Custom warm-up schedule, Delivery Consultation, Content Review, Metrics review.
- Defining and tracking Event and User attributes:

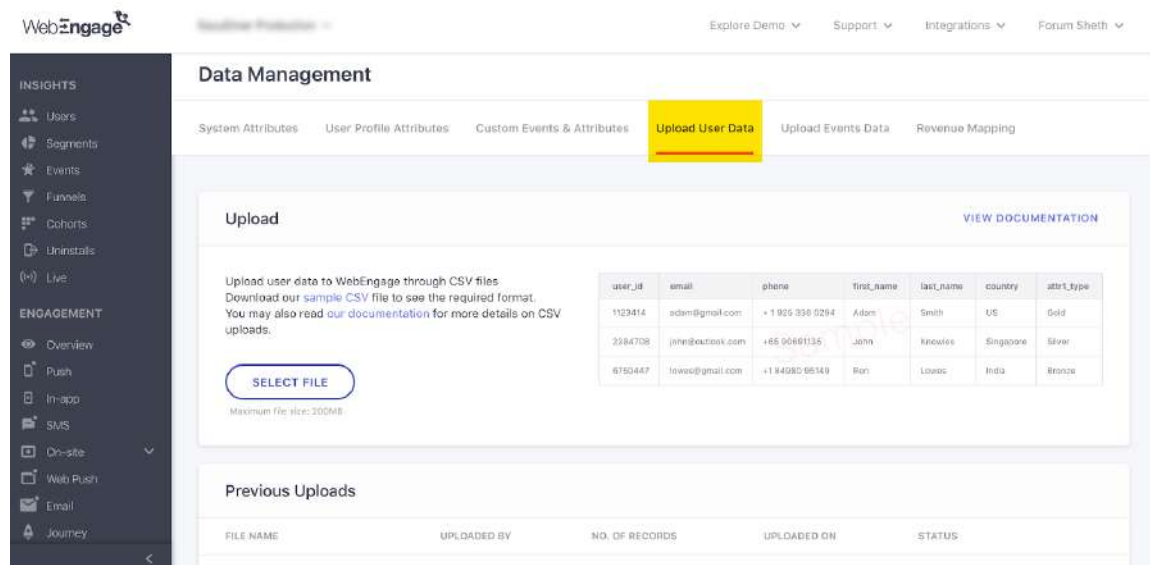
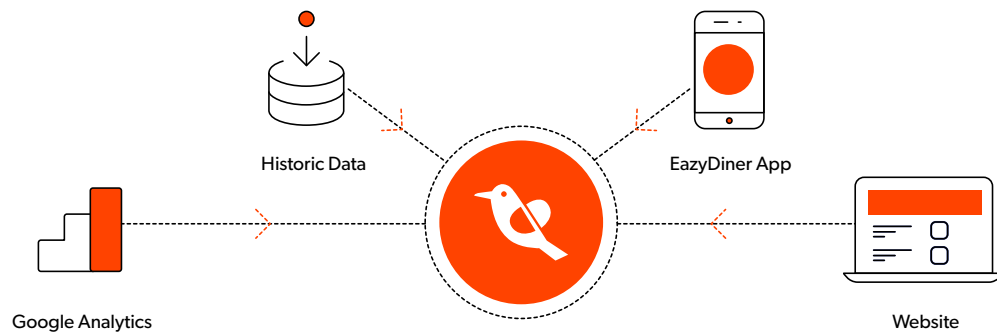


- Final reviews
- Accomplishing notes
- Journeys and campaigns creation
- Initial go live campaigns

- Customer Meeting
- Review of warm-up
- Dashboard training
- Uploading historic user data

- **Fused the user data into a single platform:**

We collated the user data from across the channels and mediums and stored it on a single platform i.e. our marketing automation platform.



- **Provided dedicated and human assistance:**

Along with the integration manuals, product tutorials, documentation, and educational emails our onboarding manager played a proactive role in ensuring and aiding the EazyDiner team at every stage of integration. The manager provided one-to-one training and assistance.

From: **onboardingmanager@webengage.com**  
Date: [REDACTED]  
Subject: WebEngage x EazyDiner: Integration Phase  
To: team@eazydiner.com

Hey team,

You can now start integrating your staging website with the [staging dashboard](#). You can refer to the following section on our knowledgebase to complete the SDK integration: <https://knowledgebase.webengage.com/docs>

Let me know if you have any queries!

Best  
Onboarding Manager @WebEngage

### ● Enabled real-time indication:

We have a progress meter for each function of integration. The color of the success meters for every function changes from red to orange to green as the integration progresses from undone to in process to completed respectively.

The screenshot shows the WebEngage dashboard interface. On the left is a sidebar with navigation options under 'INSIGHTS', 'ENGAGEMENT', and 'SETTINGS'. The main content area is titled 'Status' and contains a table showing the 'Integration Status' for various functions across four platforms: WEBSITE, ANDROID, IOS, and SMS/EMAIL. The status is indicated by colored buttons: green for 'SUCCESS' and orange for 'PENDING'.

	WEBSITE	ANDROID	IOS	SMS/EMAIL
SDK Setup	SUCCESS	SUCCESS	SUCCESS	
Track Users	SUCCESS	SUCCESS	SUCCESS	
Track Events	SUCCESS	SUCCESS	SUCCESS	
In-app Setup		SUCCESS	SUCCESS	
Push Setup		SUCCESS	SUCCESS	
On-site Setup	SUCCESS			
Web Push Setup	PENDING			
SMS Setup				PENDING
Email Setup				PENDING

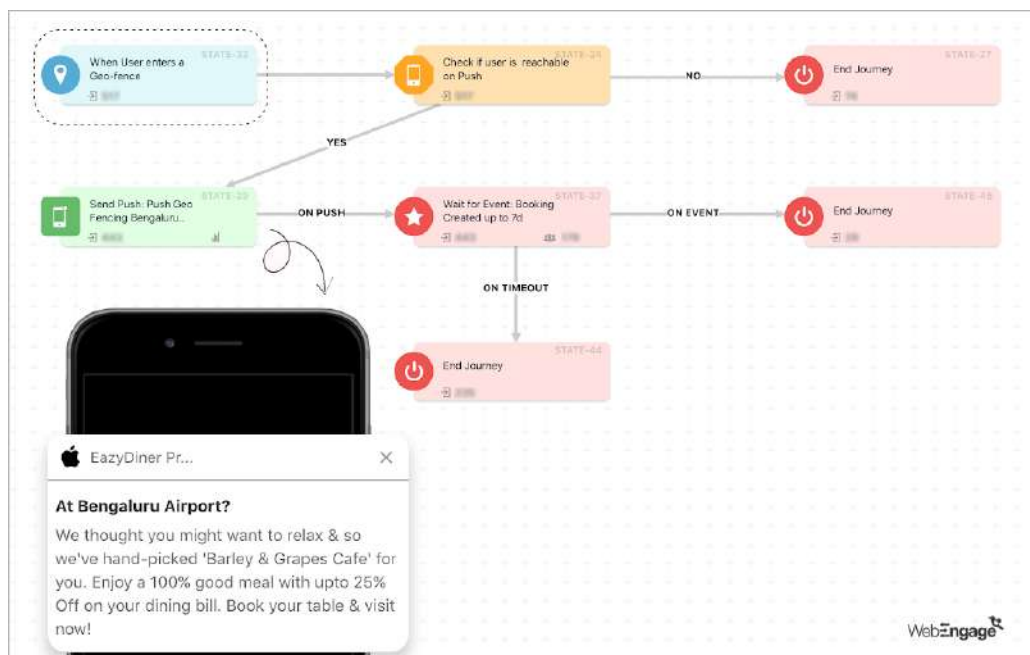
- **Solicited feedback at every level :**

For us, it's never too late to ask for feedback. So during the integration phase, our team sought feedback from the EazyDiner stakeholders after every milestone was crossed. We made checkup calls to ensure that everything is done correctly and as expected. We do this regularly even after the onboarding is completed.

### **Simplified Use cases:**

- **Location-based targeting:**

We enabled the geo-fencing feature to ensure that a user looking for restaurants/offers in a particular area gets exact communication about all the restaurants in that particular area.



- **Segment-based user targeting:**

We recommended creating segments of users depending on their past actions and behavior. This helped them in deciding the next best communication and send it in a personalized manner.

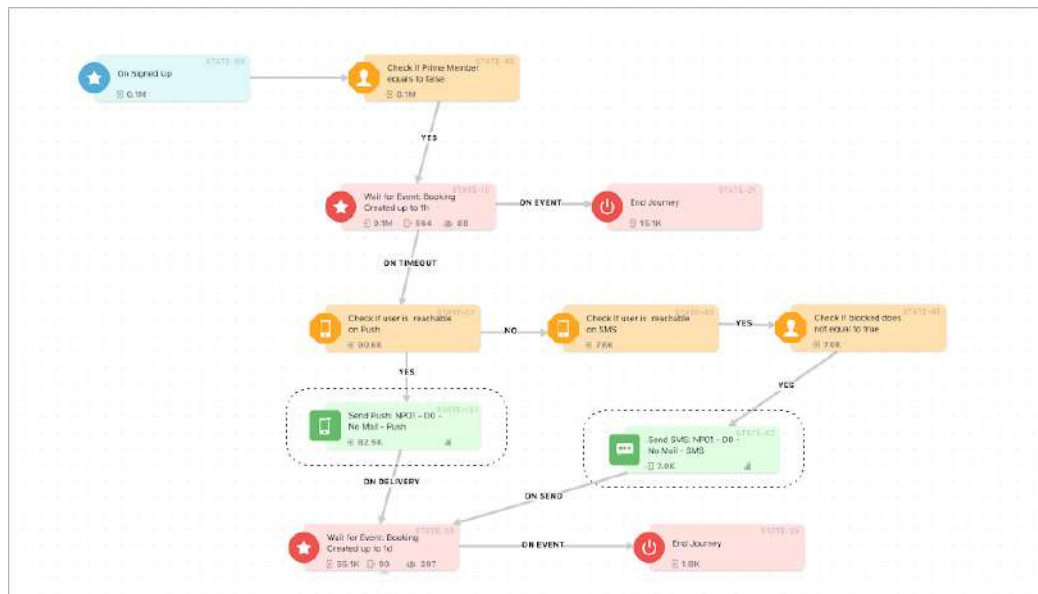
..... who have

performed the event, **app-installed** max between **last 7 days**

with user attribute **booking done** equals to 0

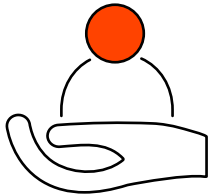
- **Cross-channel engagement:**

Instead of sending messages on different channels in an ad-hoc or bulk fashion, we suggested creating cross-channel journeys - to help EazyDiner orchestrate their campaigns across channels throughout the customer lifecycle.





# WebEngage's Customer Onboarding Essentials



Customer-First Approach



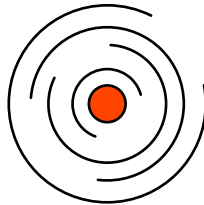
Onboarding Experts



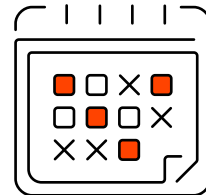
Welcome Kit



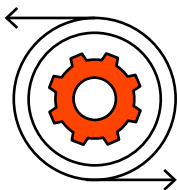
Product Tutorials



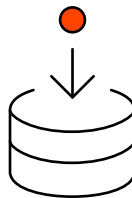
Goal Setting



Timely Meetings



Hassle-Free Integration



Data-Driven Outlook



One-To-One Training



Soliciting Feedback

# Customer Testimonial

“ Our idea is to make the eating out experience enjoyable, authentic and friction-free for every user. So we were highly skeptical about the integration aspect of WebEngage as we’ve had less than ideal experiences with other service providers in the past. But the onboarding team at WebEngage made the process a hassle-free and convenient. Important channels and mediums were integrated correctly and the entire integration process was completed within the assured timeline. I can vouch for the onboarding experience and expertise that WebEngage offers to its customers. I’m also excited to see how our integration with new channels (social media and WhatsApp) turns out to be!



**Ajay Bansal**

VP Product at EazyDiner

”

# Loved the case study?

Get a free product walkthrough. Talk to our experts for custom solutions.

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WebEngage is a full stack marketing cloud which gives a 360° view of your users & your marketing efforts (& everything else in between). Loaded with cross platform & cross channel analytics, the suite makes it possible to drive user engagement & retention with data driven, personalized campaigns through multiple channels, including the revolutionary Journey Designer.

50,000+ consumer businesses use WebEngage everyday to improve their user engagement and retention. Why are you still hesitant?

**TALK TO US TODAY**

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