



# Everboarding: The Modern Approach to Onboarding

Courtney Sembler | September 5th

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# Where are we going today?

1. The Evolution of Traditional Onboarding
2. Why now?
3. Everboarding Framework
4. Implementation
5. Closing

“Most companies are very focused on getting new customers into their funnel. It’s unsustainable as a business model to spend so much money generating new, disengaged customers. Until your company masters keeping customers engaged, it’s like pouring champagne down the bathtub without a stopper.”

Tara Nicholle Nelson

Author of The Transformational Consumer





We've seen this concept from HubSpot since the introduction of inbound.

Keeping your customers engaged is the only way to keep momentum.

So what does this mean  
for traditional onboarding?

# Quick Poll

Raise your hand if...

you think onboarding ends after  
90 days?

# Evolution from Traditional Onboarding

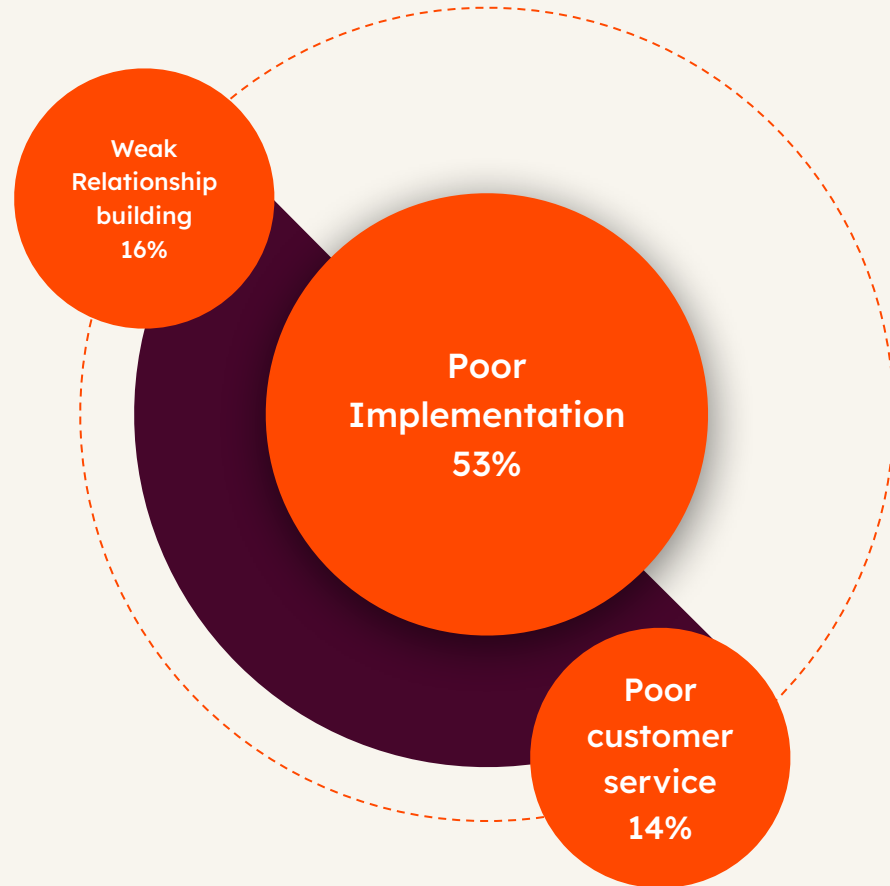
# Traditional Onboarding

A point solution. Focused on a customers first 90 days and aimed at completing initial setup and first time usage of some tools or services.

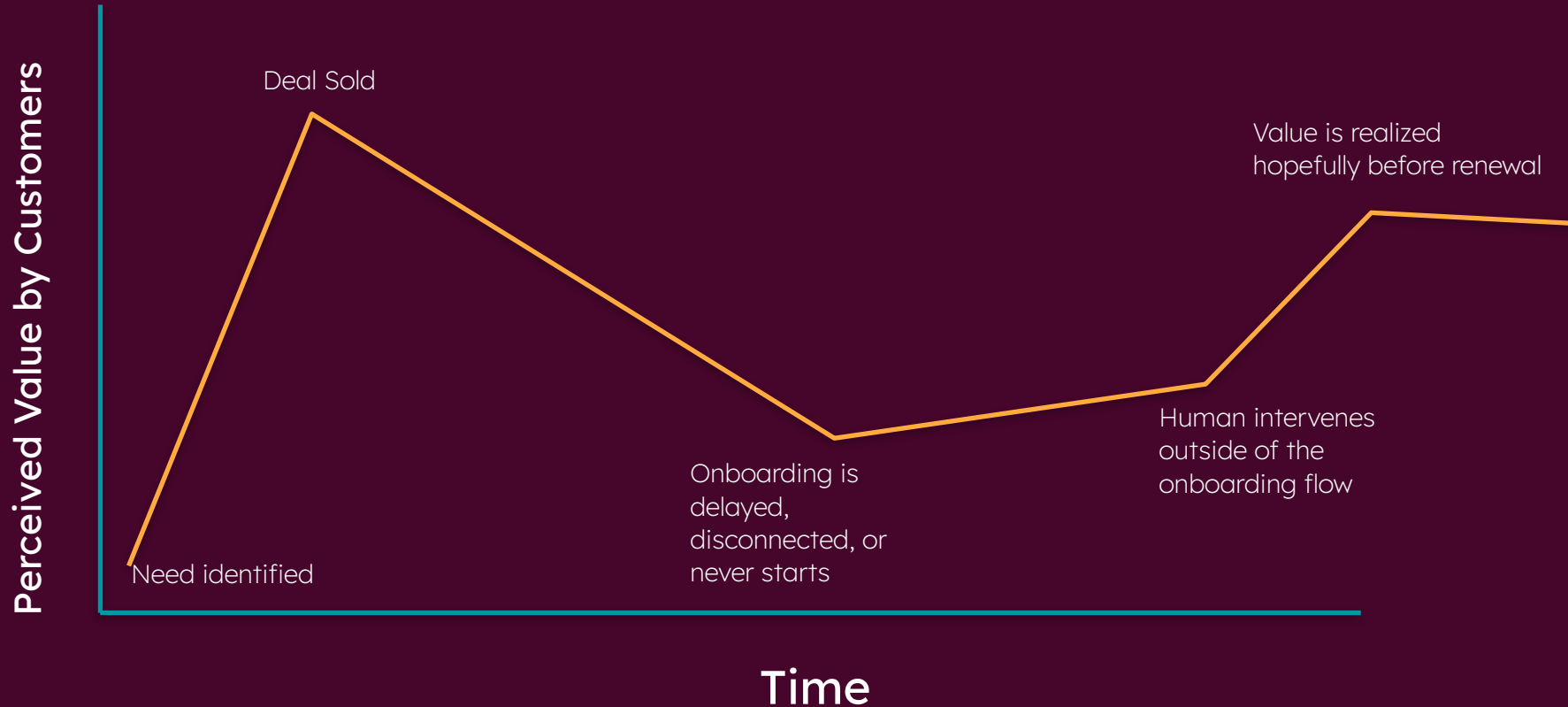
# Challenges of Traditional Onboarding

- Limited timeframe creates artificial endpoints
- Focus only on initial setup and first-time usage
- Customers left to figure out advanced features alone
- No connection to ongoing business growth needs

# Leading Causes of Churn



# What happens with Traditional Onboarding





We all know that hope is  
not a strategy

Product-led onboarding

**Everboarding**

Orchestrated onboarding

Seamless onboarding

# Everboarding

A philosophy that creates a flywheel effect starting with onboarding and building momentum and value with continuous education.

From Day Zero everboarding is the modern and expanded approach to onboarding. Starting with the idea that onboarding can happen at any time, even before purchase and continuing the swing by supporting customers throughout their lifecycle helping them adopt tools to support all their use cases and see ongoing value.

# Key Shift

From Day Zero through entire customer lifecycle

# Our Modern Reality

Onboarding can happen at any time, even before purchase

The slide features a light beige background with two large, semi-circular decorative elements. One is in the bottom-left corner, transitioning from red to light blue. The other is in the top-right corner, transitioning from dark red to teal. Centered on the slide is the text "Why now?".

# Why now?

# Customer Landscape as Changed

- **Customer Expectations:** Immediate value and ongoing support
- **Product Complexity:** Modern tools require continuous learning
- **Competitive Advantage:** Education as a differentiator

# Everboarding

## 01

### Customer Success Metrics:

- Increased tool adoption across use cases
- Higher customer lifetime value
- Reduced churn through continuous value realization

## 02

### Revenue Impact:

- Drives MRR growth through expanded usage
- Creates opportunities for upselling and cross-selling
- Generates new customers through educational content



# Everboarding Framework

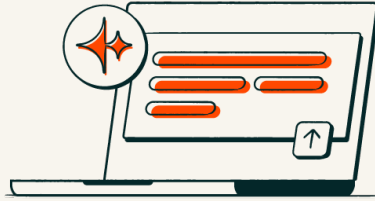
**Does Everboarding only happen in product-led or digital motions?**

# Everboarding can be used across all segments & formats



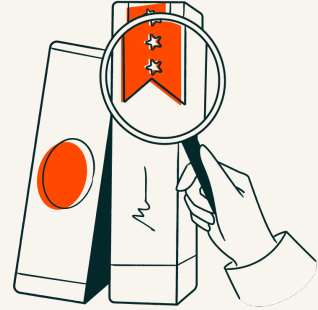
1:1 Onboarding with an  
Onboarding Specialist

Typically upmarket or enterprise customers



Product-Led Onboarding

Can be used for all customers regardless of  
segment



Scaled/Digital Onboarding

Often your lower monthly recurring revenue  
customers but can be applicable to all

# How does it work?

### 3 Part Framework

# Everboarding

## Day Zero Realization

- Immediate value before onboarding begins
- Pre-purchase education and learning paths
- Seamless transition from prospect to customer

## Continued Education

- Self-paced learning pathways
- Just-in-time content delivery
- Community-driven learning experiences

## Integrated Design

- In-app guidance and recommendations
- Connected learning across all touch-points
- Personalized learning journeys based on customer needs

# Day Zero Realization

- 01** Video content accessible to prospects; often free customer education in the form of videos, courses, even certification courses
- 02** Community examples and engagement to enable exploration pre-purchase and aid in discussions after purchase
- 03** Live premium engagements to hear from existing customers, your team, and more

# Continued Education

- 01** Education does not stop once someone becomes a customer
- 02** Use agents and assistants to deliver content contextually and when customers need it most
- 03** Learn while doing and practice with short-form videos on key tasks and strategies to get them started and continue on their journey

# Integrated Design

- 01** Embed content directly into existing flows of working within your tools
- 02** Share content in multiple platforms and use tools like HubSpot remix to have different versions
- 03** Personalize the journey with specific learnings paths for personas or needs (AI tools can help contextual this content further by using data from your customers)

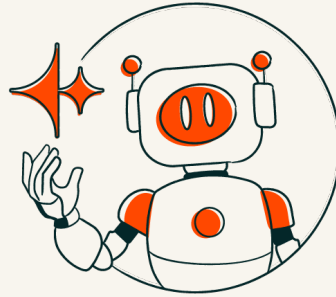


# The tech stack



## Customer Education Suite

(LMS, video, localization)



## Automation Tools



## Community Platform

Each now enabled with AI to be more efficient, effective, and faster

# Implementing Everboarding

# Roadmap

### Build the Foundation

- Audit current onboarding touchpoints
- Map customer learning journey
- Identify content gaps and opportunities
- Establish success metrics

### Content & Experiences

- Create everboarding content library
- Develop automated nurture sequences
- Build in-app guidance systems
- Launch community spaces

### Scale & Optimize

- Implement personalization engines
- Expand multi-language/regional offerings
- Integrate AI-powered recommendations
- Establish continuous feedback loops

# Overcoming Common Challenges

# Resource Allocation



- Start with existing content and optimize
- Leverage automation to scale personal touch
- Partner with other departments for content creation

# Defining Success



- Traditional metrics: Time to value, feature adoption
- Everboarding metrics: Continuous engagement, expanding use cases
- Long-term metrics: Customer lifetime value, advocacy

# Organizational Alignment



- Cross-functional stakeholder mapping
- Clear role definitions and responsibilities
- Regular communication cadences

# The Future of Everboarding

- AI-powered personalized learning paths
- Predictive content and tasks based on customer behavior
- Seamless handoffs between automated and human touch





# Closing

With Everboarding hope is no longer your strategy for you or your customers.

# Key Takeaways

- Everboarding transforms onboarding from a point solution to a continuous value engine
- Implementation requires strategic thinking but can start with existing resources
- Success depends on customer-centric design and cross-functional collaboration



Your CTA

# Onboarding Homework

- 01** Write down all the ways you and your team use hope as a strategy to onboard and enable customers.
- 02** Where do you use reactive tactics to engage at risk accounts?
- 03** What might a seamless journey for customers look like?

Your CTA

# Immediate Actions

- Audit your current onboarding experience
- Map your customer's complete learning journey
- Identify one area to pilot everboarding principles
- Connect with others implementing similar approaches



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