



# Simple checklist for enterprise software onboarding

Software onboarding is critical to setting your teams up for success – whether you're welcoming a new employee to the organization and familiarizing them with different platforms, or you're rolling out a new application for the first time.

And while getting that first impression right is vital, nailing the second, third and even fiftieth impression is just as important.

How can you make sure this happens? We've put together a handy checklist that you can use to set your software onboarding processes up for success.

## Before people have used the software or process in question, have you...

- Communicated why the software is used and the value it adds to them and the organization?
- Scoped out which features and functions people will need to use?
- Explained when and how people will be able to access it?
- Prepared support materials (e.g. 'how to' guides, instructional videos) that people can access?
- Arranged dedicated training sessions where people can get first-hand experience of the software?
- Mapped out necessary in-app support, based on how people will use the tool?
- Set up appropriate analytics, so you can see meaningful usage data and capture workflow insights?

## During people's first interaction with the software, have you...

- Tailored the welcome message for each person and user type, whether based on their role, location or the context of how they'll use the software?
- Initiated step-by-step guidance and guided tours?
- Signposted key features and functions, so people know which ones they may frequently use?
- Asked people to complete a simple 'pay off' task (e.g. checking and updating profile information) to familiarize them with the software?
- Provided useful pop-up tips and information, to add context to key features and functions?
- Explained where people can access support materials, chatbots or additional help?

## On an ongoing basis, are you...

- Making support materials readily available?
- Gathering feedback from users to understand if they need additional training or in-the-flow-of-work support?
- Analyzing software analytics to see where your people need additional support?
- Arranging follow-up guidance or training at key intervals following the first use of the software?
- Encouraging people to regularly access the software if it should be used day-to-day, or providing refreshers on if it's a platform that is used infrequently?
- Communicating and providing support for software updates, UI changes and new feature rollouts?

Run through the checklist and think you're ready to go? Great!

Still have some questions about in-app support, analytics or anything software onboarding? No problem. AppLearn are experts in helping you get the most out of your software.

Visit our site to find out more about our [digital adoption platform](#) or [how we can support your onboarding efforts](#).