

Customer Onboarding in the Software Solution Business – How Provider Activities Create Customer Outcomes

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Abstract

Even though software solutions are developed with a strong customer focus, customers often encounter challenges and frustrations when learning to use them effectively. To overcome these challenges, software solution providers have started implementing customer success management (CSM) as a new business function responsible for ensuring that customers' goals are actually achieved when using the purchased solution. A key element of CSM is customer onboarding, the process of familiarizing a customer with a firm's solution offering at the beginning of the usage phase. To date, there is only limited empirical knowledge about the specific activities involved in customer onboarding and their outcomes for the customers. We conduct an exploratory qualitative study involving 32 professionals actively engaged in CSM and customer onboarding across different firms and develop a conceptual model comprising six research propositions that identify the type and scope of customer onboarding activities and specify their effects on customer firms' readiness to use a solution, their solution usage, and their perceived solution success. Moreover, we provide managerial implications and avenues for future research.

1 Introduction

Providers in the software industry offer a variety of software solutions, which are customized bundles of software components and additional services, such as help desk, training, implementation, and advanced consulting services (Tuli, Kohli, & Bharadwaj, 2007; Valtakoski, 2015). Depending on the customer's needs and organizational context, providers configure these offerings to support a wide range of business functions, for example, enterprise resource planning (ERP), customer relationship management (CRM), sales automation, supply chain management (SCM), online sales, and team collaboration, to name a few. Over the past decade, an increasing share of these solutions has been delivered through a software-as-a-service (SaaS) model, which is characterized by cloud-based, on-demand access, continuous updates, and subscription-based pricing (Benlian & Hess, 2011).

This shift toward SaaS fundamentally alters the logic of value creation in business-to-business (B2B) software markets. Rather than being realized at the point of sale, value emerges progressively through customers' ongoing use, integration, and effective application of the solution in their daily operations (Elgeti & Kleinaltenkamp, 2022). As a result, providers are increasingly dependent on customers' ability to adopt and utilize the software successfully over time. This dependency places customer onboarding at the center of customer success management (CSM), as onboarding represents the critical initial phase in which customers are introduced to the solution, supported in early usage, and guided toward first value realization. The core of CSM is to help customers achieve their goals associated with the purchase and implementation of the software solution by realizing its promised and expected value in use (Gehring et al., 2025; Kleinaltenkamp et al., 2023). CSM is therefore defined as “the proactive (versus reactive) relational engagement of customers to ensure the value potential of product offerings is realized by the customer” (Hochstein et al., 2020, p. 3).

The idea of CSM originated in the software industry, where flexible subscription- or consumption-based business models are increasingly used, with recurring revenues central to providers' financial performance (e.g., Kowalkowski & Ulaga, 2024; Benlian et al., 2011). Companies such as Salesforce were among the first to recognize that sustaining long-term customer engagement is not just a support function but a critical component of firm success (Atkins et al., 2018). If customers fail to use their software effectively or do not see measurable value, they are likely to cancel their subscriptions, leading to high churn rates and revenue losses. These insights have not only led to analytics-driven engagement models such as customer health scores, a set of metrics combining evaluations of relationship quality, solution usage, and value realization to predict the likelihood of churn (Hochstein et al., 2023, 2024), but also to the implementation of dedicated customer success teams. In the meantime, CSM, as a new business function, is spreading globally across all industries where solutions are sold and implemented, and where value to the customer is created and experienced throughout the customer's entire usage process (Bond et al., 2020).

A central element of software solution providers' CSM efforts is customer onboarding, which is defined as “the process of familiarizing a customer with a firm's service offering” (Voorhees et al., 2017, p. 274) that guides customers through the initial stages of adopting a software solution (Steinhoff et al., 2025). To date, however, very little is known about the provider's activities and the customer-related outcomes of customer onboarding, especially in the software solutions business. Among the few pertinent studies, the one by Retana, Forman, and Wu (2016) shows that proactive customer education provides an opportunity to design an exceptional customer experience during the early stages of solution use. Steinhoff et al. (2025) investigate the impact of add-on bundling during the onboarding stage on customer retention, and Voorhees et al. (2017) emphasize that customer onboarding is a crucial “pre-core service encounter” (p. 271) that

can positively influence the overall service experience. Nevertheless, research on customer onboarding remains scarce (Steinhoff et al., 2025; Voorhees et al., 2017), particularly regarding the activities undertaken by software solution providers and their impact on customers' solution usage and perceived success. Therefore, this paper aims to address the following research questions: (1) *Which activities do software solution providers perform as part of their customer onboarding processes?* (2) *How do these customer onboarding activities lead to customer outcomes?*

Given the nascent understanding of customer onboarding in the software solution business, we investigate these research questions through an exploratory qualitative study with 32 CSM professionals from various B2B firms. Our findings yield a conceptual model that specifies, through six research propositions, how customer onboarding activities undertaken by software solution providers affect customer firms' readiness to use the solution, their participation in using the solution, and their perceived solution success. Our study reveals that the intensity of such customer onboarding activities varies with customer importance and their onboarding prerequisites. This leads to a spectrum of customer onboarding approaches, ranging from a low-touch approach, comprising automated procedures and self-serve options, to a high-touch approach, involving an intensive onboarding process delivered by dedicated customer success managers and numerous personal touchpoints throughout the customer journey. In this way, our research provides a detailed understanding of how software solution providers' customer onboarding activities influence customer firms' readiness to use a solution, leading to their effective participation in solution usage and, ultimately, solution success, which are the key objectives of customer onboarding in the ideal case.

2 Theoretical Background

Onboarding a customer firm, i.e., familiarizing its representatives with a software solution, assumes that there are gaps between the requirements for successfully using the solution and the actual conditions at the customer's end during the transition from purchase to use. Consequently, we first introduce the concept of software solutions as customized offerings, then characterize the specific challenges that customers face when using a software solution to achieve its expected value in use, and finally present the concept of customer onboarding, which providers develop to help solution customers better address these challenges.

2.1 Software solutions as customized offerings

Software solutions comprise software components and a range of services, from basic help desk support to advanced consulting services (Valtakoski, 2015). Frequently, they are highly complex, leveraging current technologies (e.g., cloud-based platforms and artificial intelligence) and knowledge-intensive services (e.g., consulting or process optimization) that yield substantial benefits to the customer's business activities. They might also include specific hardware devices, beyond standard desktop computers, such as handheld devices and wearables for logistics applications, or hardware infrastructure for hosting the software solution on-premises when cloud-based solutions are not accepted by the customer, e.g., due to data protection reasons. As with solutions in B2B markets in general, software solutions are typically used over extended periods, resulting in a prolonged engagement between the customer and the provider (Valtakoski, 2015).

For a solution to meet customer-specific requirements, its software and service components, and potentially also the hardware components, have to be tailored to the customer firm's business processes (e.g., Davies

et al., 2006; Nordin & Kowalkowski, 2010; Sawhney et al., 2006; Tuli et al., 2007). This customization necessitates a significant degree of customer participation in solution design, implementation, and usage (e.g., Cermak et al., 1994; Silpakit & Fisk, 1985; Tuli et al., 2007) mainly for two reasons. First, customers need to specify not only their needs but also the interfaces to all relevant firm resources (e.g., other IT systems) and the processes necessary for the software solution to function effectively. Second, customers must provide the required informational and physical resources at the right time and in the right place for the solution to be provided (Elgeti & Kleinaltenkamp, 2022). We refer to this type of customer participation in the solution business as solution participation, defined as the mental, physical, and informational efforts and involvement of customer firms and their representatives related to a solution's definition, implementation, and use (i.e., the overall solution process).

2.2 Solution usage readiness

To successfully participate in a solution's definition, implementation, and usage (solution participation), customers need to be ready. "Readiness" generally refers to a person's or an organization's potential to participate in a given future behavior (Atkinson, 1964). This capacity represents the combination of the abilities or capabilities of human beings or organizations and their motivation to act (Danatzis, Karpen, & Kleinaltenkamp, 2022; Dong, Sivakumar, Evans, & Zou, 2015; Vize, Coughlan, Kennedy, & Ellis-Chadwick, 2013; Yen, Wang, Wei, Hsu, & Chiu, 2012). A firm's readiness to use a solution successfully, i.e., its solution usage readiness, therefore, combines a firm's solution-specific capabilities (Elgeti, Danatzis, & Kleinaltenkamp, 2020) and its motivation to engage in solution processes. In their study, Elgeti et al. (2020) identify five sets of solution-specific capabilities that customers require to use solutions: interactional capabilities, sourcing capabilities, experience utilization capabilities, internal organizational capabilities, and innovation capabilities. Based on these insights,

we assume that the more customer firms can draw on such solution-specific capabilities, the higher their solution usage readiness.

However, such capabilities can only contribute positively to the success of solution usage if the representatives of a customer firm also want to apply them. Customers' motivation to integrate their resources into the providers' solution processes often suffers from their apathy, as they are indifferent to suppliers' initiatives, their ambivalence, which is reflected in their reluctance to cooperate with the solution providers, or even their annoyance, which manifests itself in open aversion and rejection of corresponding provider initiatives (Malshe & Friend, 2018). Based on existing research that sees value in use as an essential driver of both individual and organizational behavior (Woodruff, 1997; Kleinaltenkamp et al., 2022; Macdonald et al., 2016), we assume that the motivation to activate such capabilities and employ them in solution processes depends on the expected and experienced value in use that the representatives of a customer firm perceive from a solution when buying and/or using it (Eggert et al., 2019). Accordingly, we assume that the higher the expected and/or experienced value in use of a solution, the higher the firm's and its representatives' motivation to engage in solution processes.

Moreover, in line with recent readiness research (Danatzis et al., 2022), we assume that neither a firm's solution-specific capabilities nor its motivation alone will instill a high level of solution usage readiness. Instead, both components must surpass a minimum threshold to establish a potential that may translate into action. Thus, even if firms or their representatives are highly motivated to engage in solution processes, they may fail to do so if they lack the respective capabilities. In turn, firms with high levels of solution-specific capabilities will not be ready to engage in solution processes if they are insufficiently motivated, i.e., if the expected and/or experienced value of using the solution is perceived as too low. Therefore, we assume that if either the solution-specific capabilities or the motivation to engage in solution processes falls below a minimum threshold,

overall solution usage readiness is expected to be nonexistent.

2.3 Customer onboarding

The importance of customers' solution usage readiness in solution deployment and usage suggests that solution providers should focus on their customers' solution usage readiness to increase solution success for both customers and themselves. To enhance customers' solution-specific capabilities, standard tools, such as how-to guides or manuals, are offered to provide some (basic) knowledge about a software solution, while many other aspects are frequently left to learning by doing. Moreover, motivational elements are typically not covered by such dominantly technical resources. The more complex a software solution is, the more it requires far-reaching and customized measures to increase customers' solution usage readiness. This is mainly reflected in customer onboarding activities that have become part of solution providers' CSM efforts (Kleinaltenkamp et al., 2023). These activities aim to familiarize customers with a firm's solution offering (Voorhees et al., 2017) by guiding the representatives of a customer firm through the implementation and early usage phase of a solution, i.e., in the transition from the purchase to the post-purchase phase of the customer journey (Lemon & Verhoef, 2016; Purmonen, Jaakkola, & Terho, 2023) or from the pre-core to the core service encounters (Voorhees et al., 2017).

The concept of onboarding has its roots in the literature on socialization (e.g., Bauer & Erdogan, 2011) and has primarily been discussed in human resource management as a process of individual adaptation to new organizational realities (Feldman, 1981; Maanen & Schein, 1977). Accordingly, literature has emphasized differences in individual characteristics, such as proactivity, self-efficacy, skills, and abilities, and how these may impact an individual's socialization (e.g., Gupta et al., 2018; Kammeyer-Mueller & Wanberg, 2003). However, from a human resource management perspective,

such socialization processes require action by the organization and its managers, rather than mere adaptation by the individual (Cable et al., 2013; Kurnat-Thoma et al., 2017; Stein & Christiansen, 2010). In practice, this insight has led to the development and implementation of detailed onboarding practices that aim to reduce uncertainty and potential fears, helping individuals come to terms with new circumstances and equipping them with the necessary knowledge and relationships (e.g., Klein, Polin, & Leigh Sutton, 2015). Consequently, these practices encompass activities that welcome, inform, and guide new organizational members in their roles (Klein & Heuser, 2008).

This firm-internal, employee-related view of onboarding aligns with our previous conceptualization of solution usage readiness, which holds that customers' readiness increases as their capabilities and motivation to engage in solution processes grow. Notably, unlike employee onboarding, customer onboarding in the software solutions business does not refer solely to the individual level, as reflected in the customer firm's employees, but also encompasses the customer firm's organizational structures and processes that are important for the successful implementation and use of a software solution.

2.4 Summary

Based on our previously outlined theoretical foundations, we assume that customers' solution participation increases as their solution usage readiness increases (Section 2.1). This solution usage readiness combines two components: (1) solution-specific capabilities and (2) the motivation to engage in solution processes, which interact, whereby both elements must exceed a minimum threshold for solution usage readiness to take effect (Section 2.2). All measures of customer onboarding are aimed at either customers' solution-specific capabilities or their motivation to engage in solution processes (Section 2.3). Consequently, the outcomes of customer onboarding are reflected in

increased customer solution usage readiness, effective solution participation, and, lastly, customer-perceived solution success.

3 Method

Based on this understanding, we conducted an exploratory qualitative study, following a theories-in-use approach (Zeithaml et al., 2020) to unearth practitioners' perspectives on their customer onboarding activities and their effects on the customer side. This approach enables a discovery-oriented investigation, uncovering previously unknown details (e.g., Aspers & Corte, 2019; Makri & Neely, 2021; Timmermans & Tavory, 2012) as a foundation for the researchers to “use their viewing lenses to elicit, evaluate, abstract and extend what they ‘hear’ from theory holders included in the study” (Zeithaml et al., 2020, p. 34).

3.1 Data collection

To gather data, we first conducted 32 in-depth interviews with CSM professionals (managers, leaders, and coaches) from various B2B companies offering software solutions. All experts were selected from the provider side because these professionals are best positioned to provide deep insights into the structure and design of onboarding processes, as they are directly involved in shaping these processes within their organizations. This selection aligns with the research objective of understanding onboarding dynamics from the perspective of those who design and implement these strategies. All interviewees were approached through the professional social network LinkedIn. We used a theoretical sampling approach, in which we asked interviewees to refer us to colleagues with specific expertise in customer onboarding who could help us examine aspects of the phenomenon we believed required further investigation. These referrals not only increased the number of available participants but also

enhanced the quality of the interview data, as the study increasingly drew from professionals with specialized onboarding knowledge, gradually completing the picture of onboarding activities, customer outcomes, and their relationships. The semi-structured interviews were conducted via Zoom, Microsoft Teams, and in-person meetings, and were recorded and transcribed verbatim. The average interview duration was 53 minutes. The interview guide is presented in Appendix A, and the sample is given in Tab. 1.

The interview guide was designed to gather in-depth insights from CSM professionals regarding various aspects of CSM in general and customer onboarding practices in particular. The interview questions were carefully structured to explore the professionals' general understanding of the field and their specific knowledge of the roles, responsibilities, and practices within the CSM function. The interview guide evolved significantly throughout the research process. With each interview conducted, new insights and knowledge were gained, enhancing the ability to pose more profound and targeted questions. For instance, the concepts of “first-time value” and “time to first value” were initially unfamiliar but were subsequently integrated into the interview guide because interviewees commonly used them. This iterative process enabled a more thorough exploration of various topics and contributed to a nuanced understanding of the subject matter.

3.2 Data analysis

The interviews were coded using the Gioia Methodology (Gioia et al., 2013; Magnani & Gioia, 2023), a widely employed approach for theory building from qualitative data that incorporates both inductive and abductive reasoning. In line with our research questions, our data analysis focused on identifying the activities that representatives of software solution providers perform during customer onboarding and understanding how these activities lead to customer outcomes. Reflecting the theory-in-use approach (Zeithaml et al., 2020), we

were interested in novel if-then relationships between onboarding activities and customer outcomes. Correspondingly, the resulting data structure comprises first-order concepts, second-order themes, and aggregated dimensions that give an overview of relevant activities (see Sections 4.1 and 4.2) and outcomes (see Section 4.3). The relationships between these activities and outcomes are presented in a conceptual model and corresponding propositions (Magnani & Gioia, 2023). While conducting the interviews, we began coding the data, creating first-order concepts from the informants' perspectives (Gioia et al., 2013). During this process, we documented all conceptual and theoretical thoughts in memos that resemble the development of ideas about codes and their interrelationships (Glaser, 1998; Montgomery & Bailey, 2007). We then connected the first-order concepts in a stepwise process to form theory-informed second-order themes and aggregate dimensions (Magnani & Gioia, 2023), which increasingly reflected our sensemaking of the interview data. That is, we alternated between analyzing the data, reviewing the existing literature, and conducting additional interviews to condense the second-order themes and aggregate dimensions of the data structure (Gioia et al., 2013; Magnani & Gioia, 2023), gradually moving towards theoretical saturation. In parallel, we derived a conceptual model from the data structure that shows “the dynamic relationships among the emergent concepts” (Gioia et al., 2013, p. 22).

To validate our data analysis and mitigate researcher-induced biases, we employed an evaluation and feedback-seeking approach through LinkedIn messages and video meetings. The conceptual model resulting from our data analysis was evaluated based on feedback from ten CSM professionals (eight of the previous interview sample and two additional experts; see Tab. 2). Based on their feedback, we identified precise wording to capture practitioners' adequate understanding of the aggregate dimensions and refined the data structure.

To assess the stability and quality of our findings, an intercoder reliability test was con-

ducted. Seven independent judges, who were neither part of the author team nor involved in the interview and feedback samples, were asked to allocate themes to the aggregate dimensions from our data structure. This procedure resulted in a proportion of interjudge agreement of 0.77. This corresponds to a proportional reduction in loss of 1.00 (Rust & Cooil, 1994), which is above the recommended cutoff of 0.70 (Rust & Cooil, 1994) and even the more stringent standard of 0.90 suggested by Nunnally (1978).

4 Findings

The final data structure encompasses 14 second-order themes and three aggregate dimensions: (1) *pre-onboarding activities*, (2) *customer onboarding activities*, and (3) *customer onboarding outcomes* (see Figures 1 to 3), which we present in detail in the following.

4.1 Pre-onboarding activities

From the interview data, we identified *pre-onboarding activities* that are performed in a preparatory phase before the actual customer onboarding, i.e., after customers have signed the contract but are not yet actively using the software solution they procured. Consequently, these pre-onboarding activities are predominantly executed on the provider side only. By doing so, the software solution providers aim to establish a smooth, effective onboarding process during the transition from sales to CSM. Accordingly, by aligning customer expectations with the solution provider's resources, the pre-onboarding activities help ensure that both customers and providers are well-prepared for the onboarding journey and that a strong foundation for achieving solution success is established. The pre-onboarding activities thus serve as a crucial bridge between previous sales activities and the formal onboarding process, ensuring a seamless and effective transition

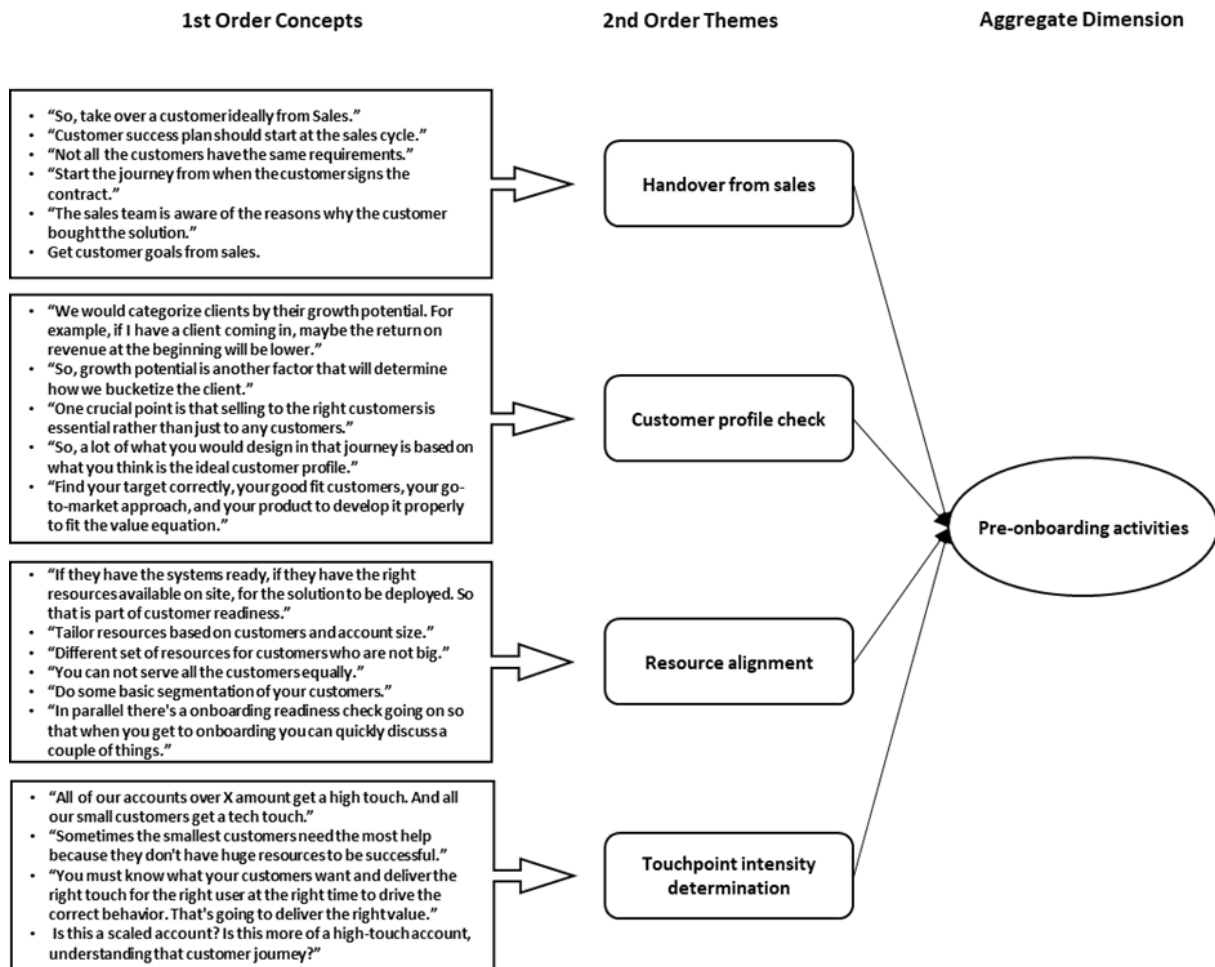


Fig. 1 : Data structure part I (pre-onboarding activities)

from buying to using on the customer side. Four sets of pre-onboarding activities emerged from our analysis: (1) *handover from sales*, (2) *customer profile check*, (3) *resource alignment*, and (4) *touchpoint intensity determination* (see the second-order themes in Figure 1).

4.1.1 Handover from sales

The *handover from sales* to CSM includes transferring relevant knowledge about the customer firm and the software solution to be delivered from the salespeople involved to the CSM professionals responsible for the onboarding process. This handover process is pivotal in avoiding customer frustration immediately after purchasing a solution. Customers, for instance, often get annoyed when asked to repeat information they have already provided to the sales team. Such redundancy wastes time for both parties and creates a negative impression

of the software provider, thereby undermining trust and satisfaction. To prevent such situations, both internal handovers between sales and CSM teams, as well as external handovers between the provider and the customer firm, are fundamental for this transition.

The *internal handover* involves a thorough, structured knowledge transfer from the salesperson to the customer success manager(s) who is (are) responsible for the account, before the official onboarding process. The internal handover is more than just a transfer of data; it is an opportunity for the CSM professional to gain insight into the nuances of the customer’s expectations and potential challenges. This preparation enables the CSM professional to enter the customer relationship with a deep understanding of the customer’s needs, processes, and structures, thereby reducing the

need for repetitive questions and ensuring that all customer interactions are value-driven.

Once the internal handover is complete and the CSM professional is well-equipped with all the relevant information, the *external handover* with the customer firm takes place. This is typically a meeting among the customer's representative(s), the CSM professional(s), and the salesperson(s). It is usually the customer firm's first direct interaction with the CSM team, as one CSM professional states:

“Sales team, customer success team, and the customer should have a handover meeting before the onboarding planning kicks in. So, that way all three parties involved have the same vision.” (#12, Customer Success Lead)

The salespeople, CSM professionals, and representatives of the customer firm may use this opportunity to document and confirm the goals established at the outset of the sales process. One of the most critical aspects of the external handover is preventing adverse consequences of potential overpromising during the sales process, which could lead to unrealistic expectations on the customer side and cause conflicts between sales and CSM. While sales teams sometimes overpromise to secure a contract, the CSM team oversees the fulfillment of those promises. The CSM team may therefore struggle to meet customer expectations if unrealistic promises were made during the sales process. Consequently, it is necessary to ensure that all parties have clear and consistent information about the promises made to the customer and the expectations they have generated. The sales and CSM teams can effectively align their efforts to meet customer expectations by documenting customer requests made during the handover, reducing the risk of miscommunication, and ensuring the CSM team is fully prepared to deliver on commitments made during the sales process. By detailing the handover activities, these insights complement recent literature on CSM (Boghe et al., 2024) that highlights challenges related to ownership conflicts and inadequate handovers between sales and CSM teams.

4.1.2 Customer profile check

Following the handover, a typical next step in pre-onboarding is a *customer profile check* that analyzes customers by location, cultural requirements, needs, and preferences. This step not only customizes subsequent interactions to meet customer needs but also identifies those customers who are not a perfect fit for the solution provider's portfolio and capabilities. Initially, every firm aims to establish an optimal customer-solution fit profile, defining the characteristics of customers who would benefit most from the solution. However, the sales team's focus on achieving high sales volumes can sometimes lead them to prioritize quantity over quality. This may result in closing deals with customers who do not perfectly align with the solution's intended use or value proposition. Consequently, there is a risk of onboarding customers who are not well suited to the offering, leading to dissatisfaction, higher churn rates, and wasted resources. The CSM team must therefore reconfirm the customer profile during the post-handover preparation phase to address this issue. This phase, often called post-handover preparation, involves analyzing the customer's profile in detail to understand the extent to which their needs, expectations, and goals align with the company's ability to deliver effective solutions. This reconfirmation is crucial for preventing potential misalignments and ensuring the onboarding journey is purposeful and efficient. One expert emphasized:

“One crucial point is that selling to the right customers is essential rather than just to any customers.” (#11, Senior Customer Success Manager)

Ideal customer profiles provide valuable insights into the best customers and their needs, enabling a more efficient approach to attracting and retaining them. Understanding these ideal customers allows tailoring the customer journey to align with their specific requirements, enhancing their perception of the value of the solution. Rather than relying on assumptions about ideal customers, it is essential to

collect data on their pain points, preferences, and value goals. This involves analyzing top customers to identify patterns, common traits, characteristics, goals, and pain points. Regularly defining and refining the ideal customer profile is crucial, as continuous data collection allows for more accurate profiling that keeps pace with customers' evolving preferences. Customer profile checks, therefore, also serve as an important internal feedback and learning mechanism: insights from the CSM department about “good” and “bad” customer fits are fed back to the sales department, improving future targeting and qualification. In this way, each customer interaction becomes part of an iterative organizational learning loop. This loop continuously refines the ideal customer profile throughout the customer journey, or even across multiple customers over time:

“If it’s a conscious choice to say, we know this is going to be a bad fit customer and we probably have three years with them in our lifetime, then it’s okay to take them. But you start right then on the sales side, on the acquisition side, finding a replacement for them who is a good-fit customer, so that by the time they churn, you can replace that revenue. Otherwise, you’ve just lost all of your profit. If you haven’t reached your payback moment on what it costs to acquire them. So, basically, you want to choose your churn. This is a part of operational efficiency. If you’re going to have churn, you want to choose your churn. But you actually build a churn forecast. These are the ones we want to churn.” (#16 Regional VP Customer Success)

These insights complement recent literature on unrealized solutions in business markets, which elucidates that a mismatch between the customer solution value proposition and the customer solution value expectation may disrupt customers' value creation process at an early stage and may even lead to a solution not being used at all (Elgeti & Kleinaltenkamp, 2022). Our findings not only identify the potential adverse effects of this mismatch for

the provider but also demonstrate how pre-onboarding activities can mitigate it.

4.1.3 Resource alignment

Resource alignment refers to strategically organizing and allocating the provider's resources, such as time, budget, personnel, and technology, to ensure they are used effectively to achieve the firm's goals and objectives. Within resource alignment, prioritization aims to enhance account profitability by focusing organizational efforts on the most critical and valuable customers or segments. While a customer profile check aligns the customer portfolio with the provider firm's capabilities, prioritization ensures that resources are allocated where they will have the most significant impact. A customer success consultant explains that the main reason for prioritizing customers is typically resource restrictions on the provider side:

“Then prioritize [...] where you want to put your limited resources, because you always have limited resources.” (#7, Advisor Customer Success Consultant)

Consequently, resource alignment is based on prioritization criteria that, according to our analysis, typically comprise four key factors that help solution providers evaluate and categorize customers by their significance and potential value. These are (1) growth/success potential, (2) revenue potential, (3) strategic importance, and (4) onboarding readiness. The *growth/success potential* reflects how much a customer firm can grow with a solution and how likely it is to succeed. The *revenue potential* refers to the financial benefits a customer could bring to the company. At the same time, the *strategic importance* reflects a customer's influence, market position, or strategic alignment with the provider firm's long-term goals. Lastly, *onboarding readiness* captures a customer firm's current status and ability to adopt and use the solution successfully. It is typically assessed through a checklist that covers a comprehensive range of readiness indicators, such as the skills of the customer firm's representatives, its previous experience with similar

solutions, its ability to operate independently, the completion of necessary training modules, the degree of preparedness for technical integrations, and the general willingness to engage in the onboarding process.

The summative assessment of the four prioritization criteria yields the *cost to serve*, which considers the resources required to support the customer effectively and the potential returns or strategic benefits arising from that customer relationship. Based on the costs to serve that have not yet been considered in the customer onboarding literature, solution providers can allocate resources according to each customer's importance and decide which onboarding approach is most suitable for each customer category, thus aligning prioritization criteria with the onboarding approaches applied.

4.1.4 Touchpoint intensity determination

Based on the assessment of the *cost to serve* caused by a customer firm, *touchpoint intensity determination* involves determining an appropriate level of engagement and interaction across core onboarding activities at different customer touchpoints throughout the onboarding process. These findings complement research on customer education, which shows that providers' willingness to educate is a manifestation of customer prioritization (Florea et al., 2022), thereby extending this finding to the entire spectrum of onboarding activities. Touchpoint intensity determination typically results in a decision whether to use a high-touch or low-touch approach. *High-touch onboarding* is reserved for customers with significant revenue potential, strategic importance, or high-growth prospects that together justify a high level of investment. Consequently, this approach is characterized by a high level of provider engagement, which is reflected in preferential treatment of the customer firm and frequent, often personalized interactions with its representatives, as described by a customer success manager:

“We have a high-touch relationship. We talk to them weekly, and we go there. We

have personal meetings, lunches, sometimes dinners, and events with them. So, it's a very close relationship. Low touch, not so close.” (#26, Customer Success Manager)

By providing a highly tailored onboarding experience, CSM professionals aim to ensure that customers' complex requirements are addressed, customized solutions are implemented, customer needs are fully met, and the customer-provider relationship is strengthened. However, customers may also refuse to use high-touch onboarding because they believe it would require too many resources on their end.

“Not all customers want to have a red carpet because they don't have the bandwidth or the time to have a human conversation with you on a monthly or every quarter basis, or whatever it is.” (#31, Senior Customer Success Manager)

By contrast, *low-touch onboarding* is used for customers who may not require extensive support or belong to segments where growth or strategic value does not justify a high investment of resources by the provider. This approach is characterized by automated touchpoints and self-guidance, providing customers with tools and resources to onboard independently, supported by automated tools, and minimizing the need for direct human intervention. Consequently, low-touch onboarding is usually less costly. Based on the customer's needs and available time, a mix of high-touch and low-touch activities can be designed and implemented; for example, if initial discussions indicate time constraints on the customer's side but the customer is strategically important.

While resource allocation is initially guided by the customer's organizational characteristics and anticipated requirements, it can later be adjusted as CS professionals gain a deeper understanding of the customer's learning preferences and workflows, enabling a more customized touchpoint intensity.

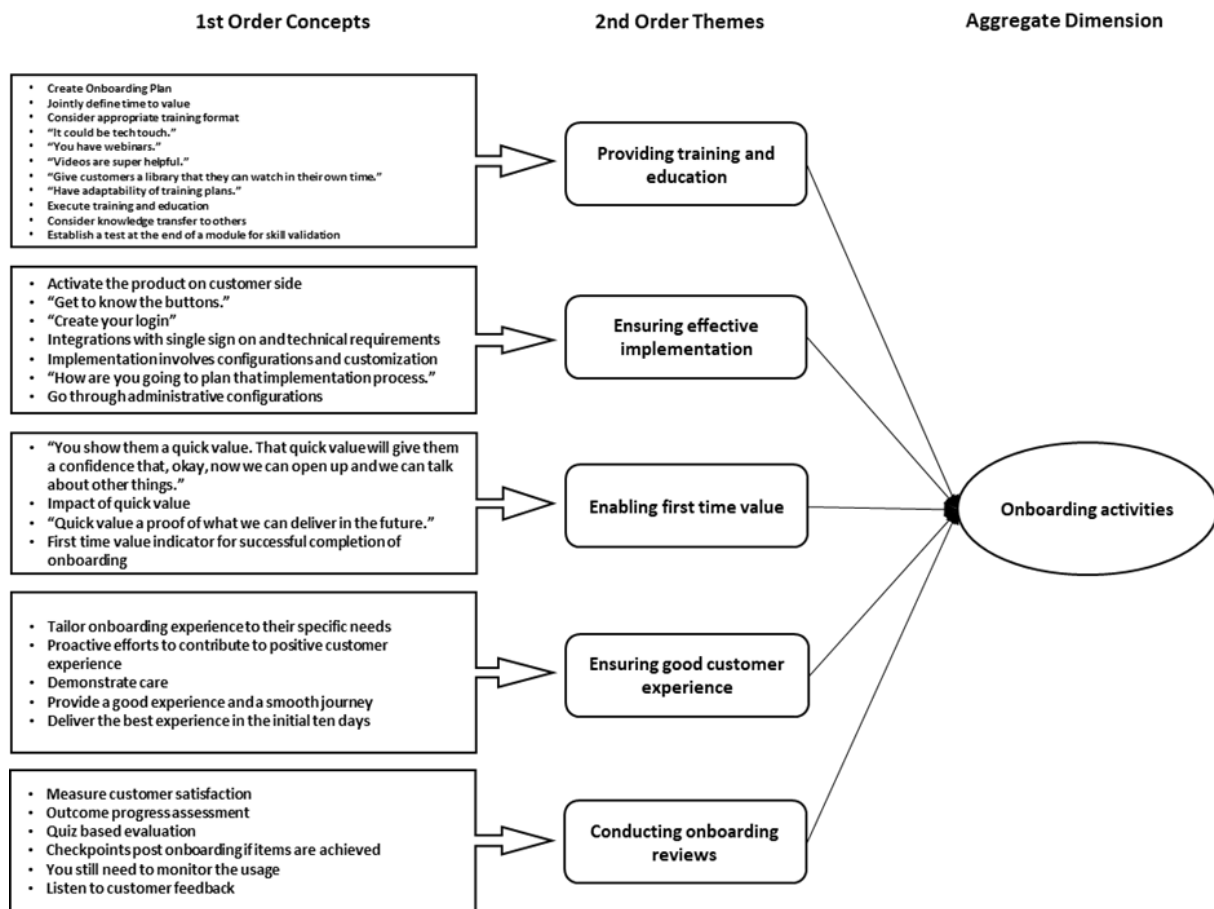


Fig. 2 : Data structure part II (onboarding activities)

4.2 Customer onboarding activities

Based on our analysis, we identified five sets of core customer onboarding activities that solution providers typically conduct for and often in collaboration with their customers. These activities are (1) *providing training and education (individual level)*, (2) *ensuring effective implementation (firm level)*, (3) *enabling first-time value in use*, (4) *ensuring good customer experience*, and (5) *conducting onboarding reviews* (see the second-order themes in Figure 2).

4.2.1 Providing training and education (individual level)

Providing training and education (individual level) encompasses all activities that equip individual users of a solution within the customer firm with the knowledge and skills to utilize the solution's different functionalities effectively. This resonates with literature on

customer education in B2B contexts in general (Bonney et al., 2022; Florea, Nieto-Saucedo, & Reyes-Mercado, 2022; Florea & Nieto-Saucedo, 2025; Ng, Plewa, & Sweeney, 2016), as well as related to B2B services (Wilden et al., 2019), solutions (Tuli et al., 2007), and CSM (Hochstein et al., 2021) specifically. These studies emphasize that customer education aims to enhance customers' skills and provide clear explanations of the offering's advantages and disadvantages (Florea & Nieto-Saucedo, 2025). Accordingly, these customer onboarding activities are crucial to ensuring that customer firms achieve the desired outcomes from using the solution.

For this purpose, a well-structured onboarding plan is essential for systematically identifying and prioritizing the training components most relevant to the customer. This plan thus provides a foundation for tailoring the educational experience to ensure the training aligns with the customer's needs, goals, and expectations.

Based on the identification of customer metrics and value indicators, the onboarding plan clearly defines the training objectives, timelines, and milestones. The perceived value of a solution may vary depending on the customer's specific business case; therefore, it is critical to understand and validate the customer's expectations regarding value and success during the usage process. This is not only crucial to tailor the onboarding according to specific customer needs but also to prevent customers from having wrong or false expectations regarding what the solution can deliver, as noted by a head of client success:

“Some customers might get full value out of a system by using 50 % of the functionality. It is not great, but that is the reality. Other customers can get full value by using 75 % of the functionality.” (#14, Head of Client Success)

CSM professionals often send out agreements that document the goals and milestones to inform other stakeholders on the customer side about the onboarding goals and to adjust them as necessary.

Based on customers' varying learning preferences and educational needs regarding reading downloadable content or having virtual or face-to-face learning, CSM professionals reflect on different training approaches to accommodate these differences. Considering the appropriate learning format emphasizes the importance of selecting a suitable medium for delivering training, as this may significantly impact the effectiveness of educational activities.

Moreover, the resources on the customer side play a pivotal role in designing the onboarding plan, as the activities require investments of time and effort, learning, and, at times, staff turnover. Skill validation tests are conducted to assess whether the knowledge acquired can be applied and whether customers have learned effectively, to determine the effectiveness of training and education. This is achieved, for instance, through quizzes at the end of training sessions that assess whether a customer has met a specific score threshold. Other tests involve cases or scenarios where the trained

customers must apply the knowledge they have acquired.

4.2.2 Ensuring effective implementation (firm level)

Ensuring effective implementation (firm level) involves the technical process of activating the solution on the customer's side by seamlessly integrating it at the enterprise level and ensuring it aligns with the customer's existing systems and processes. The setting up of user credentials and familiarizing oneself with the system's interface is fundamental to implementation, as a customer success manager describes:

“I would define implementation as the initial steps you take, such as creating your login and password and getting acquainted with the system's functionalities.” (#26, Customer Success Manager)

Furthermore, the solution needs to be technically configured and integrated into the customer firm's existing infrastructure to ensure compatibility with other systems and data sources within the organization, and to embed new software into existing applications. Such implementation processes are typically guided by an execution plan that outlines when and how the various setup steps will be carried out. This plan is crucial for coordinating the implementation of multiple components and ensuring that all parties involved are prepared for their respective roles. An implementation may precede training in some scenarios, especially when technical infrastructure is required to support practical training activities.

4.2.3 Enabling first-time value in use

Enabling first-time value in use refers to the moment when a customer first perceives and experiences value from a solution. In the context of customer onboarding, it is the first point at which customers see a tangible outcome or benefit that aligns with their expectations and goals for purchasing the solution, at both the individual and organizational levels. Achieving first-time value in use reflects how well CSM

professionals understand customers' needs, pain points, and workflows, and indicates their commitment to ensuring success during usage. For example, a senior customer success manager reports how demonstrating a software solution to a logistics manager influenced his perception of the value it offered to him, his team and his company:

“So, you can literally just put the AI filter on top of that to highlight all of the cranes. And then you can go in with the 3D modeling to look at the heights and then look at whether how the marking is mapped. How much time would that save for you? Right. And he's like, holy ***, that would pretty much, you know, like free up my entire team. Like I've got people like on the road for hours and hours a week doing that.” (#31, Senior Customer Success Manager)

Consequently, when customers experience value in use for the first time, they gain confidence and build trust in the provider's solution. Many practitioners therefore emphasize that the primary goal of onboarding is to deliver first-time value, as it represents a crucial milestone in the customer journey. Thus, onboarding plans are often designed to ensure that customers experience this value in use as early as possible. Consequently, CSM professionals also emphasize the importance of speeding up the time to a customer's first value realization, making it a key performance indicator for onboarding success, as a regional vice president of customer success states:

“Did you create value from the project, and how fast did you create that value? Because remember, we are not just obsessed with creating value. We are obsessed with, you know, the speed to that value.” (#16, Regional Vice President Customer Success)

This perspective emphasizes the idea that the speed with which value in use is delivered is almost as important as the value itself, which aligns with research on the adoption of customer value propositions in the subscription

business that shows how vital early realizations of value in use are for contract renewals (Elgeti et al., 2024). Additionally, measuring the time to first-time value in use may help to identify potential failures in the onboarding process. It can thus reveal insights into areas where onboarding might fall short, highlighting where additional support or adjustments might be necessary.

4.2.4 Ensuring good customer experience

Since first-time value in use is an experiential concept, managing relevant experiences and understanding how customers perceive them are vital to ensuring successful onboarding processes. Consequently, *ensuring good customer experience* during onboarding involves more than just introducing the solution; it encompasses the customer's overall impression, particularly their interactions, the support they receive, and the ease with which they can begin using it. Providing a seamless, engaging, and personalized experience in the early stages of the customer usage journey is crucial to establishing a positive, long-term relationship between the customer and the provider firm. Therefore, it is essential to proactively contribute to a positive customer experience and assess its impact.

“So, things like improving the demo process for customers can immediately impact the customer experience.” (#20, Customer Success Specialist)

Accordingly, customers need to understand how the solution works, its value, and how it addresses their specific challenges. This involves offering comprehensive instructions, tutorials, and proactive guidance to help customers become familiar with the solution. By contrast, ambiguity or lack of communication may lead to frustration, eroding trust before the relationship begins. CSM professionals often go beyond the strict boundaries of contractual agreements to ensure customers have a positive experience. Consequently, when customers recognize the dedication and effort that go beyond what was initially agreed upon,

they are more likely to extend their business and potentially increase the scope of future engagements. This proactive effort reinforces the provider's commitment to customer success, not just to fulfill contractual obligations. These insights add customer onboarding-specific knowledge to recent research on customer experience management in B2B contexts, which shows that related activities contribute, more so than others, to individual convenience and empowerment that foster both individual and organizational relationships (De Keyser et al., 2025; Homburg & Tischer, 2023; Wirtz et al., 2025; Zolkiewski et al., 2017).

4.2.5 Conducting onboarding reviews

Conducting onboarding reviews measures the extent to which customer onboarding goals are achieved by evaluating progress and the onboarding program's design. Different measurement tools are used in this context, one of which is an outcome progress assessment, in which providers evaluate the effectiveness of an onboarding program by assessing how well it has met the predefined objectives and milestones of the onboarding plan. A head of customer success stated:

“And then you have sort of that check-point post onboarding: Did we achieve all of these items, and then build and iterate on it from there.” (#13, Head of Customer Success)

The progress assessment involves regularly reviewing completed tasks and comparing them with the planned objectives. Any gaps or areas of underperformance may indicate parts of the onboarding process that need improvement or adjustment, such as refining the onboarding plan, providing additional resources or support, or aligning milestones with the customer's pace.

Another common approach is the health score assessment, which evaluates how actively customers engage with the solution platform. Monitoring how frequently customers log in, tracking the number of active users, and the duration of their sessions helps identify cus-

tomers who may be struggling or underusing the platform, enabling timely intervention and additional support if needed. Moreover, survey-based evaluations are also widely used to gauge customer satisfaction, focusing on aspects such as the pace, ease, and convenience of the onboarding process.

Overall, onboarding reviews establish a feedback loop between the customer and CSM professionals, ensuring the onboarding journey remains aligned with the customer's goals and enabling lessons for future customer onboarding activities. The reviews provide an opportunity to assess the customer's progress, identify areas for improvement, and adjust the approach as necessary. Specifically, reviews help CSM professionals understand the typical onboarding duration and identify ways to shorten it. By systematically conducting onboarding reviews, providers can thus gain comprehensive insights into the effectiveness of their onboarding programs and make data-driven improvements. Furthermore, based on onboarding review data, CSM professionals may reassess and potentially re-prioritize their customer base by status (high-touch or low-touch).

These findings provide customer onboarding-specific details to the current research on customer health scores (e.g., Hilton et al., 2020; Hochstein et al., 2023). While these metrics consolidate customer usage and relationship data to identify customers at risk of churning, helping providers prioritize customers and determine the frequency of CSM activities to allocate CSM resources more effectively and efficiently, our findings show that such activity assessments are already implemented in the customer onboarding process.

4.3 Customer-related customer onboarding outcomes

Lastly, our analysis identified five second-order themes that center around different aspects of onboarding outcomes on the customer side: (1) *enhanced capabilities*, (2) *increased motivation*,

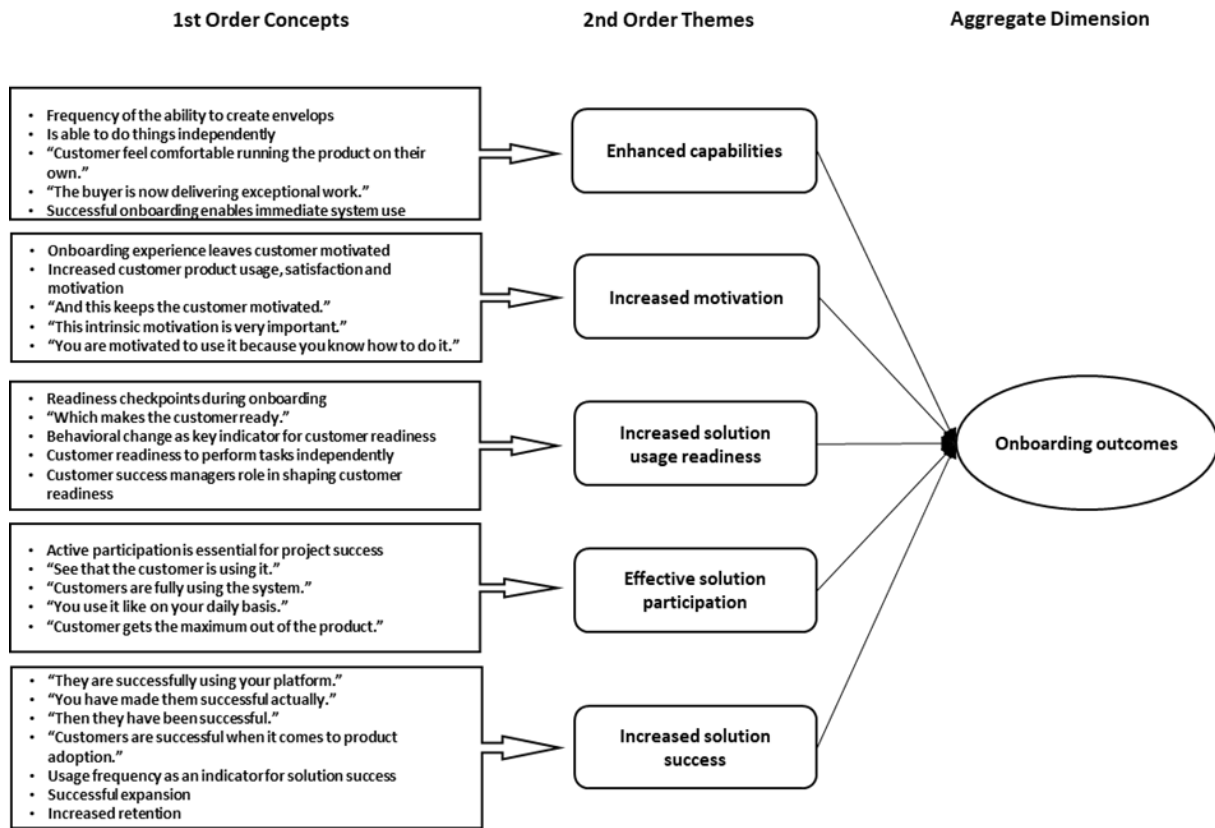


Fig. 3 : Data structure part III (onboarding outcomes)

(3) *increased solution usage readiness*, (4) *effective solution participation*, and (5) *increased solution success* (see the second-order themes in Figure 3).

4.3.1 Enhanced solution-specific capabilities

Enhanced solution-specific capabilities refer to the progression of customer skills and knowledge as a direct outcome of the training, education, and practical implementation provided during onboarding. Through these efforts, customers can understand the solution's functionalities and are empowered to use it more effectively in their contexts. They develop solution-specific skills that enhance their technical understanding and application throughout the learning and training journey. This elevation in their skill set is evident when customers perform tasks independently or use the solution effortlessly, indicating proficiency in which they no longer encounter significant barriers or need frequent support. By contrast, if customers fail to develop the necessary capabilities, they may struggle to fully real-

ize the solution's value, leading to potential dissatisfaction and churn. However, capability development is not a one-size-fits-all approach; it is heavily influenced by the type of solution and the customer's specific needs. The nature and intensity of the required skills can vary depending on the solution's complexity and the customer's intended use. Some solutions may require a deep technical understanding, while others may necessitate more strategic or operational expertise.

In addition, representatives of a customer firm may reach a point where they not only master the solution but also teach what they have acquired to others within their organization. This ability to transfer knowledge is a critical aspect of capability development. It not only reinforces the understanding of individual members of the customer organization but also promotes a culture of learning and expertise within the customer firm. This elevates the effect from an individual to a collective level. Representatives of a customer firm who reach this point often become internal champions of

the solution, advocating for its use and benefits, which can lead to its better organizational adoption.

Another way customers exceed the standard capabilities imparted through training and education is by demonstrating creativity and innovation in applying the knowledge acquired in other contexts. The representatives of the customer firm often find new and more effective or efficient ways to use solutions not covered in the initial training. Exceeding contractual goals usually leads to professional growth. A head of customer success, for instance, shared an example of a customer who leveraged their enhanced capabilities to secure a promotion within their organization.

“He presented the results to his managers and got another career level with our results together. So, this is very good when you can, like, promote someone, help someone in their position in the company with this job together, working with them is the most value they can have with us. Because now promoted, right? He was pleased with the platform and with us.” (#17, Head of Customer Success)

This quote reflects a high individual value of enhanced capabilities, which can offer transformative professional growth for a particular representative of a customer firm and solidify the relationship between the customer and the provider. Our findings, therefore, complement research on solution-specific customer capabilities (Elgeti et al., 2020) by showing how these capabilities can be enhanced through customer onboarding activities at both the individual and organizational levels.

4.3.2 Increased motivation

Moreover, customer onboarding often leads to a noticeable *increase in customer motivation*, stemming from growing interest in participating in training activities and tasks and from the benefits of continuous exposure and learning mechanisms. Together, these factors create a positive learning cycle. The CSM professionals emphasize that this motivation frequently

arises when customers perform tasks independently and experience the associated benefits. The CSM professionals also highlight that customers are more likely to stay engaged when they realize they have delivered exceptional work. This sense of accomplishment, coupled with recognition of their efforts’ tangible benefits, is a powerful motivator and excites them, as the head of customer success explains:

“If you, the buyer, are now delivering exceptional work, better work, as a result, you look good within your company. That is motivating. And that is sort of the thing we try to hook into as customer success managers.” (#13, Head of Customer Success)

This example highlights the importance of aligning CSM efforts with visible outcomes to reinforce a customer’s sense of accomplishment and professional recognition. Consequently, effective training programs are not merely about delivering content; they are strategically designed to boost customer motivation. Beyond instructional materials, interactions between CSM professionals and representatives of the customer firm play a pivotal role in shaping their motivation. CSM professionals significantly influence engagement by acknowledging and celebrating customer progress, thereby fostering enthusiasm throughout the customer journey.

Increased motivation is therefore an essential outcome of learning, as it increases active participation in the onboarding process. It not only helps achieve the success indicators outlined in the initial success plan but also encourages customers to continue participating when they see the benefits of completing specific tasks or activities. This positive reinforcement leads to behavioral changes, such as customers becoming increasingly enthusiastic and committed to the process, thereby fostering a self-sustaining cycle of motivation, recognition, and engagement that ultimately leads to more successful outcomes and strengthens the customer-provider relationship.

Moreover, customer motivation and engagement are also driven significantly by realizing

first-time value in use. When customers experience early wins and understand the tangible benefits of a solution, they are more likely to remain committed and deeply engaged. A positive first-time value in use is not merely about functionality or features; it results in alignment between the solution's outcomes and the customer's goals, at both the organizational and individual levels. An early success creates a sense of accomplishment, encouraging customers to explore additional key features of the solution and deepen their engagement. However, while enhanced solution-specific organizational capabilities (such as tailored features, integrations, or workflows) do not directly increase customers' individual motivation, they indirectly improve other conditions that do.

Our findings therefore support existing literature that highlights the positive effects of customer education on increased customer participation (Bonney et al., 2022; Ng et al., 2016; Wilden et al., 2019) and to overcome customers' unwillingness to engage with suppliers (Malshe & Friend, 2018) by identifying and emphasizing the key drivers of customers' motivation.

4.3.3 Increased solution usage readiness

Increased solution usage readiness reflects the customer's growing preparedness to effectively use a solution independently. This readiness is central to onboarding success because it ensures that customers reach a stage where they are not only familiar with the solution but also equipped to leverage it fully within their operations, as a CS and customer experience consultant explains:

“The customer is set up and is ready to do things independently, [...] to use your solution quite independently. So, they have adopted it.” (#32, Customer Success and Customer Experience Consultant)

As a result, solution usage readiness can significantly influence customers' overall satisfaction, engagement level, and, ultimately, the likelihood of long-term retention. Increasing

solution usage readiness on the individual as well as on the organizational level, therefore, helps one avoid common pitfalls, such as customers dropping out of the onboarding process due to their inability to meet the necessary prerequisites.

4.3.4 Effective solution participation

Effective solution participation refers to customers' active involvement in using and integrating a solution to achieve specific outcomes. Solution participation involves customers interacting with and applying the solution in ways that align with their business goals. It requires the customer to commit to engaging with the solution, experimenting with its features, and sharing knowledge that can help refine its use. When customers actively engage with the solution, they become more familiar with its features and functionalities, demonstrating a vested interest in achieving positive outcomes.

Accordingly, CSM professionals emphasize that solution participation is a key determinant of success because, without it, even the most innovative or tailored solutions are unlikely to yield the desired results, as a senior customer success manager states:

“One of the biggest challenges is if one of them is not willing to participate in what you are planning with them. Then it is hard to bring success to your customers.” (#4, Senior Customer Success Manager)

It is, therefore, not enough for CSM professionals to provide only the tools, guidance, and resources necessary for success. The process falters unless the customer actively uses those resources and applies the solution to their needs. Consequently, solution participation goes beyond attending meetings or responding to emails. It requires the customer to commit to engaging with the solution, experimenting with its features, and providing information that can help refine its use. Hence, CSM professionals need to cultivate a collaborative relationship with the customer in which both parties are equally invested in the solution's

success to ensure sustained participation. The CSM team can help overcome participation obstacles by fostering an atmosphere of mutual trust, transparency, and shared goals, ensuring customers feel supported throughout the process.

4.3.5 Increased solution success

The primary objective of customer onboarding is to ensure that customers ultimately achieve *increased solution success* by meeting their predefined goals through solution usage, as outlined in the customer value proposition and the resulting success plan. Success indicators may vary from one customer to another, depending on their specific business case and the business activities that the software solution is intended to support. Solution success is thus characterized by a comprehensive understanding of how to use the solution effectively and by achieving the outcomes specified in the onboarding plan. It is essential that customer solution success also translates into success for providers, as they benefit from increased renewal rates, customer referrals, and successful solution expansions. Customers who evaluate their goal achievement positively are more open to upsell and cross-sell conversations, as a senior customer success manager highlights:

“So, you also talk about upsell and the customer at this point; remember, the customer trusts you. He understands you. You’re an advocate for the customer. You’ve made them successful or done something good for them that stays in their head. Hey, this guy helped me and walked me through the whole thing.” (#11, Senior Customer Success Manager)

Hence, when customer representatives trust the CSM professionals of a provider and perceive their efforts as beneficial, it creates a foundation for additional solution sales.

4.4 A model of provider activities and customer outcomes of customer

onboarding in the software solution business

Summarizing the findings of our study, the conceptual model presented in Figure 4, along with the related research propositions (RPs), provides a comprehensive framework that specifies the relationships between providers’ pre-onboarding and onboarding activities and the corresponding customer-side onboarding outcomes (Ulaga et al., 2021). Customer onboarding is initiated through pre-onboarding activities such as *handover from sales*, *customer profile check*, and *resource alignment*. These pre-onboarding activities inform decisions about *touchpoint intensity*, ranging from *low-touch* to *high-touch* onboarding. Based on this foundation, the five core *customer onboarding activities* lead to *enhanced solution-specific capabilities* and increased motivation to engage in solution processes, which, in combination, increase the customer firm’s *solution usage readiness*. This solution usage readiness leads to *effective solution participation* and, ultimately, to *increased customer-perceived solution success*.

Based on our data analysis and the previously outlined summary, the following RPs capture the causal relationships among the model’s concepts. These propositions also highlight that solution success, as the ultimate firm-level outcome, is at least partially dependent on individual-level outcomes of customer onboarding, such as enhanced individual capabilities or increased individual motivation.

RP1a: *A high customer priority leads to a high intensity of the onboarding activities (i.e., high-touch onboarding).*

RP1b: *A low customer priority leads to a low intensity of the onboarding activities (i.e., low-touch onboarding).*

RP2: *Providing training and education (on an individual level) and ensuring effective implementation (on the firm level) enhance the solution-specific capabilities of the customer firm.*

RP3: *Ensuring good customer experience, enabling first-time value in use, and conducting onboarding reviews increase the*

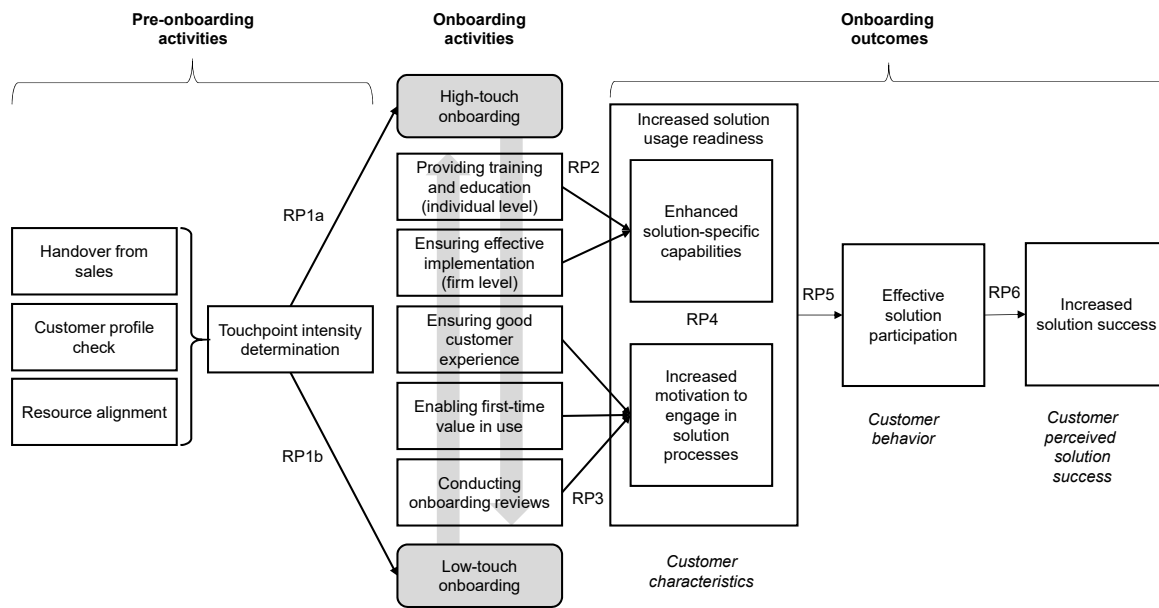


Fig. 4 Model of the provider activities and customer outcomes of customer onboarding in the software solution business

customer's motivation to engage in solution processes.

RP4: *Together, enhanced solution-specific capabilities and increased motivation to engage in solution processes lead to an increased solution usage readiness of the customer firm.*

RP5: *An increased solution usage readiness of the customer firm leads to a more effective solution participation.*

RP6: *More effective solution participation leads to an increased solution success as perceived by the customer.*

5 Discussion

5.1 Theoretical Implications

This study extends the industrial marketing and solution business literature by unpacking the mechanisms by which software solution providers' customer onboarding activities contribute to successful software solution implementation and sustained customer success. Our findings offer four key contributions that advance current theoretical conversations on

CSM, specifically in the context of software solutions.

First, we develop a *conceptual model of customer onboarding* tailored to the software solution context. While prior research has recognized the importance of post-sales processes in fulfilling value propositions (e.g., Gehring et al., 2025; Hochstein et al., 2020; Prohl-Schwenke et al., 2025), our model delineates the distinct yet interconnected nature of pre-onboarding activities and onboarding activities and their effects on customer onboarding outcomes. By articulating how onboarding practices bridge the promises generated during the sales phase with customers' early usage experiences, we underscore the onboarding phase as a critical arena for value realization. In doing so, we position onboarding not merely as a technical implementation step but as a strategic process that ensures customers are able, willing, and ready to achieve the outcomes envisioned in the value proposition. This adds clarity to the "black box" between solution delivery and value realization, highlighting the role of structured onboarding in aligning expectations, reducing uncertainty, and shaping customer behaviors during early usage.

Second, the study introduces and elaborates the *concept of solution usage readiness*, provid-

ing a theoretically grounded explanation for why some customers successfully adopt solutions while others struggle. Grounded in our empirical data and substantiated by literature emphasizing capabilities and motivation as core components of readiness (Danatzis et al., 2022; Dong et al., 2015; Vize et al., 2013; Yen et al., 2012), solution usage readiness captures both the customer's ability to perform solution-relevant activities and their motivational disposition to engage in them. Our findings demonstrate that customers exhibiting high solution usage readiness are more proactive, more persistent in addressing implementation challenges, and more likely to perceive early first-time value in use. In contrast, customers with a low solution usage readiness are vulnerable to disengagement and value shortfalls. Introducing solution usage readiness thus enriches the conceptual foundation of CSM by offering a novel concept that drives customer health and helps anticipate solution customers' participation patterns. Solution usage readiness can also provide a diagnostic lens through which software suppliers can tailor onboarding activities, allocate resources more efficiently, and mitigate risks of churn.

Third, our findings reinforce the central role of experienced value in use in solution success and contribute specifically to the emerging emphasis on *early-stage value experiences*. Prior research shows that experienced value in use strongly influences satisfaction, trust, and loyalty (Eggert et al., 2019; Prohl-Schwenke & Kleinaltenkamp, 2021; Prohl-Schwenke et al., 2025). We extend this conversation by highlighting the significance of first-time value in use – the moment at which customers initially perceive value from the software solution. This early value experience serves as a motivational trigger, overcoming customers' unwillingness to engage with suppliers (Malshe & Friend, 2018), increasing customers' willingness to invest further effort in solution participation, and accelerating the trajectory toward more profound, sustained value realization. Our findings thus complement research on value-in-use monitoring (Bischoff, 2023; Prohl-Schwenke & Kleinaltenkamp, 2021; Prohl-Schwenke et al.,

2025) by shifting the analytical focus to the very start of the usage journey, where providers can intervene most effectively. Recognizing and enabling first-time value in use helps solution providers not only identify meaningful early indicators of value realization (Elgeti et al., 2024) but also design onboarding practices that deliberately cultivate these initial value experiences.

Fourth, this study advances the literature on *customer education* by clarifying its role within customer onboarding and its downstream effects on solution participation. Existing research has highlighted the “paradox of customer education” (Levitt, 1980), wherein firms fear that increasing customer expertise may heighten customers' propensity to switch providers (Florea & Nieto-Saucedo, 2025). Our findings nuance this debate by showing that education initiatives – especially those emphasizing firm-specific knowledge – can strengthen customers' commitment to the solution and foster relational stability. This aligns with evidence from consumer contexts suggesting that company-specific expertise reinforces loyalty (Bell et al., 2017). We demonstrate that training and educational activities are not merely support services but are instrumental in enabling professional users to fully engage in co-creating value through their solution-related activities. By embedding education within a broader onboarding architecture, firms can empower customers in ways that increase – not jeopardize – the likelihood of long-term retention.

5.2 Managerial Implications

Several managerial implications can be derived from our study. First, the customer onboarding process extends beyond merely introducing a solution to the customer firm and its representatives. Effective onboarding involves delivering the right knowledge at the right time to enable customers to familiarize rapidly with the software solution and realize value in use. This requires creating tailored educational content aligned with customers' solution usage readiness and expectations – an endeavor that

depends on a deep understanding of their goals and capabilities. Developing well-designed educational materials is therefore pivotal, as such content forms a cornerstone of the customer onboarding experience. Onboarding materials must be comprehensive, transparent, and adaptable to diverse learning styles. The didactic design of onboarding programs also influences how progress can be monitored and refined over time. Tracking metrics such as onboarding completion rates, first-time value in use, and engagement with learning materials provides insights into whether customers are effectively absorbing and applying the knowledge required to achieve their objectives. These metrics help identify both strengths and opportunities for improvement within the onboarding process. Furthermore, onboarding content developed for one customer can serve as a reusable asset for future customers, reinforcing the importance of careful planning and design to ensure its longevity as both the solution and customer base evolve. Moreover, to increase customer motivation, tests and assessments can be designed so that users make progress as soon as they successfully complete specific quizzes. In addition, features such as creating a user profile or progressing through different levels can help boost motivation.

Second, the study provides guidance on designing the handover process from sales to CSM to effectively allocate resources for customer onboarding while balancing cost-effectiveness with the engagement needs of different customer types. Aligning incentives between sales and CSM teams ensures that both functions pursue shared objectives and manage customer expectations coherently. Conducting customer profile checks after the sales-to-CSM handover enhances confidence in the customer–solution fit, allowing customer success managers to identify and correct potential misalignments or overpromises early in the onboarding phase. This proactive approach reduces churn and prevents waste of resources caused by misaligned expectations.

Third, evaluating customers' solution usage readiness benefits both customers and CSM teams by enabling monitoring of progress

toward effective solution realization. For customers, such evaluations act as self-assessment tools to gauge preparedness for full solution adoption. Customer success managers on the provider side can highlight potential capability gaps and areas requiring additional support. Employing a customer onboarding readiness checklist enables teams to detect risks early and tailor interventions accordingly, for instance, ensuring that customer representatives complete necessary training or that organizational structures are ready for system integration.

Fourth, differentiating customers by their needs and long-term potential enables firms to apply an appropriate mix of high- and low-touch onboarding approaches, thereby optimizing resource utilization. High-touch customers benefit from more personalized, frequent interactions, whereas low-touch customers can be effectively supported through automated channels. Clearly defined onboarding strategies that segment customers by priority and align them with suitable engagement levels enable CSM teams to allocate resources efficiently while still delivering the desired customer outcomes.

5.3 Limitations and future research

As with any study, the current investigation has limitations, which, at the same time, offer avenues for future research. Firstly, a significant limitation of the study is the exclusion of customer interviews as a data source, which limits insight into how customers perceive onboarding practices and whether, and how, they lead to the expected outcomes in customer organizations. While our provider interviews offer valuable information on the design and implementation of customer onboarding activities and their effects from the provider perspective, they do not directly capture how customers perceive and interpret these processes.

Secondly, our conceptual model is derived from an explorative study using qualitative data. Hence, future studies that test the relationships among the concepts elucidated in our research propositions, using a quantitative research design, could help substantiate

the model or make necessary adjustments. It would be particularly valuable to develop a measurement scale for solution usage readiness, as numerous practitioners emphasized the need to assess customers' solution usage readiness during the feedback round of this study.

Thirdly, the “paradox of customer education,” first raised by Levitt (1980), highlights the dilemma of whether customer education initiatives increase customer retention or give customers the confidence and ability to switch providers. In this sense, customer education and, hence, customer onboarding may also have adverse effects, as it might encourage customers to explore alternative providers (Bell et al., 2017). This is particularly relevant in the era of SaaS delivery models, where flexible contracting and payment terms make switching providers seem relatively easy for customers. However, such effects differ. Customer education enhances customer loyalty when it is directed toward building firm-specific expertise about a software solution provider, while enhanced general knowledge might increase a customer's ability to shop around (Bell et al., 2017). Since Bell et al.'s (2017) study focuses on B2C sectors, these insights open avenues for further research in the B2B context, particularly regarding the negative consequences of customer education and onboarding, including the customers' willingness to switch during or after customer onboarding.

Furthermore, future studies could explore the concept of permanent re-onboarding, which emerged in our practitioner interviews as a response to evolving customer needs and solution changes, raising questions about the ongoing realization of value beyond initial onboarding. Additionally, the topic of paid onboarding presents an intriguing avenue for research, especially in the context of high-touch onboarding. Research should particularly examine how cost structures influence customer expectations, the willingness to pay for customer onboarding, customer onboarding engagement levels, and customers' experienced value in use.

Although our study does not explicitly focus on onboarding processes or activities occurring before the sales phase, effectively addressing the identified friction points may require a more holistic perspective that begins earlier in the customer journey. From a strategic standpoint, onboarding should not be viewed as a discrete post-purchase activity but rather as a process that begins well before a purchase decision is made and continues throughout the customer relationship. In this context, marketing activities, corporate websites, product information, and other customer-facing touchpoints may already perform important onboarding functions by shaping customer expectations, reducing uncertainty, and facilitating understanding of software and services. Consequently, onboarding may occur both directly through formal implementation activities and indirectly through pre-sales communication and customer education efforts. While some of these onboarding-related elements may already be reflected in the initial stages of our framework, their specific role and influence on the emergence and mitigation of friction points have not been systematically examined. Future research should therefore adopt a broader customer-journey perspective and investigate how both direct and indirect onboarding activities across the pre-sales, sales, and post-sales stages contribute to reducing friction and enhancing customer outcomes.

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Tab. 1 : Interview sample

Expert ID	Position in Firm	Firm Offering	Years of Experience	Interview Duration
#1	Customer Success Manager	Fleet operations and safety software solutions	2 years and five months	75:11
#2	Vice President Customer Success	CRM software solution	2 years and ten months	77:53
#3	Senior Customer Success Manager	Procurement solutions	2 years and seven months	33:39
#4	Senior Customer Success Manager	CRM software solutions	1 year and ten months	51:39
#5	Customer Success Manager	AI-powered recruiting software solutions	2 years and five months	34:04
#6	Senior Customer Success Manager	CRM software solutions	5 years and seven months	60:26
#7	Advisor Customer Success Consultant	Employment and income verification solutions	16 years and five months	70:33
#8	Customer Success Manager	ERP, HRM and CRM software solutions	9 years and seven months	54:15
#9	Customer Success Manager	Open source software solutions	2 years and one month	82:32
#10	Customer Success and Account Manager	IoT fleet management software solutions	3 years and three months	53:40
#11	Senior Customer Success Manager	CRM software solution	5 years and seven months	85:23
#12	Customer Success Lead	Healthcare software solutions	7 years and seven months	31:56
#13	Head of Customer Success	Product feedback management solutions	7 years and three months	40:00
#14	Head of Client Success	Legal practice management software solutions	8 years and eight months	53:42
#15	Customer Success and Solution Engineer Lead	Event processing software solutions	10 years and six months	53:48
#16	Regional Vice President Customer Success	Integration and automation software solutions	10 years and eight months	61:14
#17	Head of Customer Success	IT services and IT consulting	5 years and six months	52:55
#18	Customer Success Manager	ERP software solutions	9 years and four months	48:51
#19	Customer Success Manager	Content management and collaboration software solutions	4 years and four months	69:17
#20	Customer Success Specialist	Electronic signature and contract management solutions	3 years and nine months	32:30

Tab. 1 Interview sample (continued)

Expert ID	Position in Firm	Firm Offering	Years of Experience	Interview Duration
#21	Customer Success Team Lead	Fleet operations and safety software solutions	2 years and five months	51:36
#22	CEO & Principal Consultant	ERP software solutions	9 years and eight months	27:20
#23	Partner Success Strategy	Electronic signature software solutions	5 years and one month	47:26
#24	Customer Success Manager	ERP software solutions	5 years and ten months	38:41
#25	Mid-market Customer Success Coordinator	Fleet operations and safety software solutions	2 years and 11 months	37:11
#26	Customer Success Manager	HRM software solution	7 years and four months	33:33
#27	CEO & Founder	Telecommunication operations and business support software solutions	11 years and three months	58:16
#28	Executive Director Customer Success Association	Consulting services	12 years and four months	59:22
#29	Customer Success Manager	Telecommunication services	1 year and seven months	39:21
#30	Co-Founder Customer Success Chain	CRM software solutions	36 years and ten months	41:38
#31	Senior Customer Success Manager	Security workflow automation software solutions	7 years	21:59
#32	Customer Success and Customer Experience Consultant	Consulting services	8 years and eight months	38:23

Tab. 2 Feedback round sample

Expert ID	Position in Firm	Firm Offering	Years of Experience	Mode of Communication
#1	Customer Success Manager	Fleet operations and safety software solutions	2 yrs and five months	Video Meeting
#9	Customer Success Manager	Open source software solutions	2 yrs and one month	Video Meeting
#13	Head of Customer Success	Product feedback management solutions	7 yrs and three months	Video Meeting
#16	Regional Vice President Customer Success	Integration and automation software solutions	10 yrs and eight months	Video Meeting
#23	Partner Success Strategy	Electronic signature software solutions	5 yrs and one month	Video Meeting
#25	Mid-market Customer Success Coordinator	Fleet operations and safety software solutions	2 yrs and 11 months	Video Meeting
#26	Customer Success Manager	HRM software solution	7 yrs and four months	Video Meeting
#27	CEO & Founder	Telecommunication operations and business support software solutions	11 yrs and three months	Video Meeting
#28	Executive Director Customer Success Association	Consulting services	12 yrs and four months	Video Meeting
#29	Customer Success Manager	Telecommunication services	1 yr and seven months	Video Meeting
#33	Vice President Customer Success	Data and threat protection solutions	2 yrs and seven months	LinkedIn Messages
#34	Customer Success Manager and Product Specialist	IT services	3 yrs and three months	LinkedIn Messages

Appendix A. Interview guide

1. Introduction: The customer success professionals were asked to introduce themselves and give a glimpse of their professional journey.
2. The role of CSM: The customer success professionals were asked to outline their understanding of CSM. This question was relevant for identifying gaps in their role definition and for deriving implications for the execution of different onboarding styles based on their roles.
3. Customer onboarding: The customer success professionals were asked to explain how customer onboarding within their firm is defined and executed.
4. Onboarding activities: Besides the general understanding of customer onboarding, it was also important to get a clearer picture of the activities that are executed during customer onboarding. Particular onboarding activities were explicitly asked for in the later rounds of interviews, for example, what exactly is implementation within onboarding or how are onboarding reviews conducted.
5. Onboarding key performance indicators: One fundamental question was how onboarding success or progress is measured and which key performance indicators are used among customer success professionals.
6. Onboarding outcomes: Customer success professionals were asked about the outcomes of customer onboarding.
7. Recommendations: The customer success professionals were asked to give recommendations to get a better understanding of how customer onboarding could be improved. They were sometimes given a role-play scenario in which they had to provide advice to a start-up planning to introduce a customer success department and develop a customer onboarding program. The customer success professionals were sometimes asked to reflect upon their lessons learned.
8. Outro: Lastly, some open discussion points were raised, and the future of customer onboarding was reflected on.