Client Onboarding Best Practices

What we're going to cover

- Tools for the best onboarding experience

- Training & video tutorials

- How to keep your clients engaged in the first 3 months after purchase

Setup Guides and Knowledgebase

At iHomefinder, we created easy-to-use Setup Guides. Each guide is specific for different products and features to help clients get familiar with the product. Our Knowledgebase provides longer articles about different features, products, implementation, boards, and setup
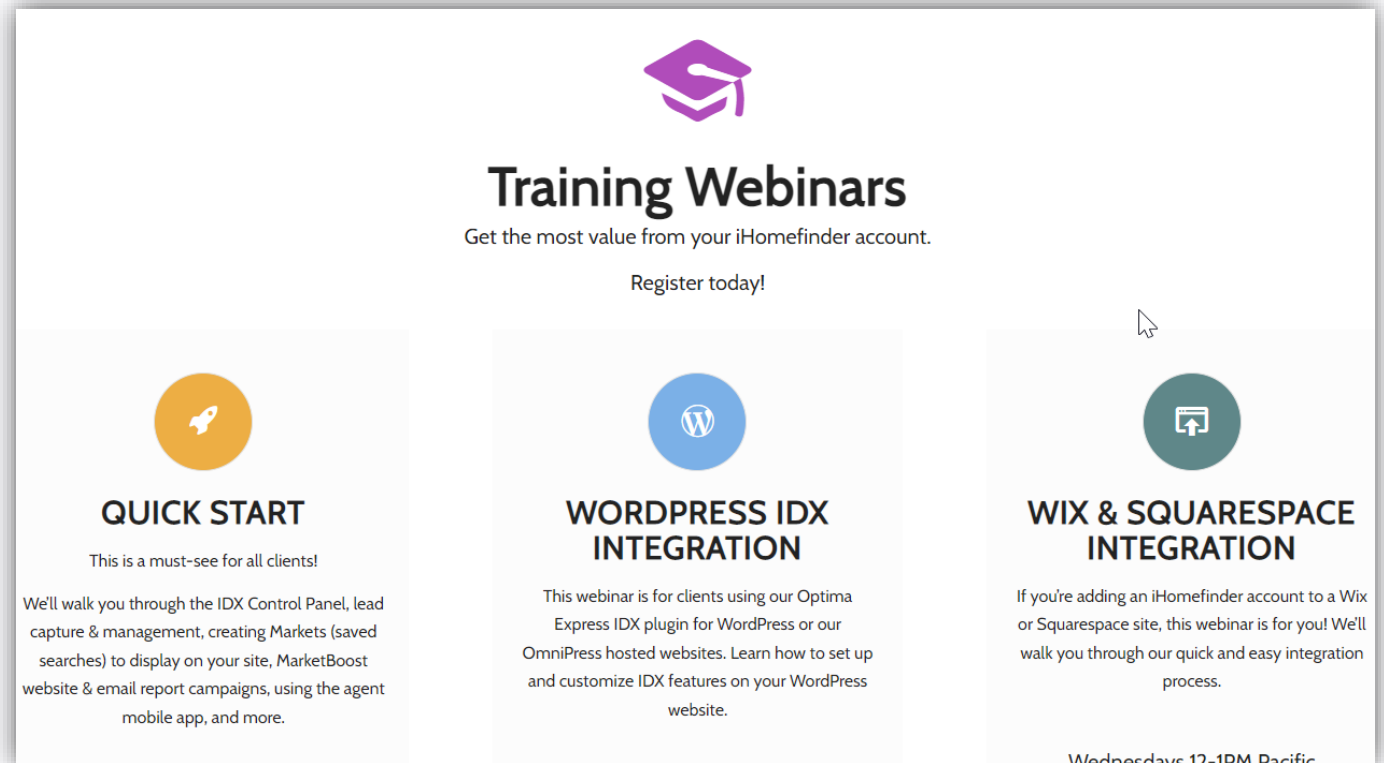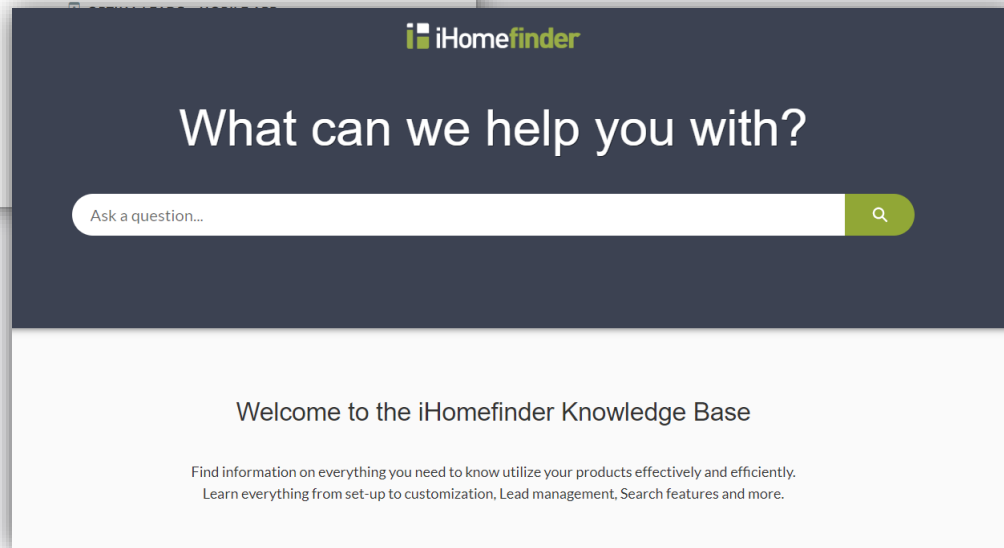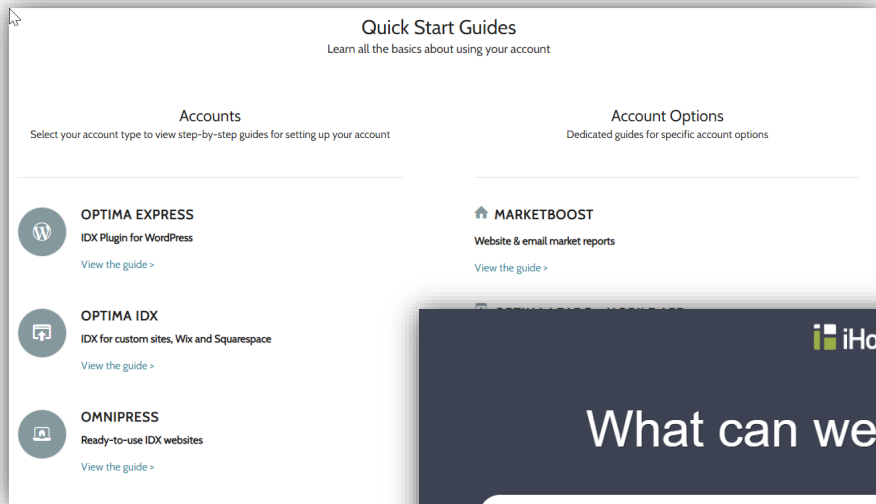

Why are they helpful?

- ☑ Highlights the most important features to get up and running

- ☑ Gives clients a place to find everything quickly

- ☑ Can include text, screenshots, and videos for easy use

- ☑ Creating your own Setup Guides or Knowledgebase gives your clients training resources at their fingertips!

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Training Webinars

iHomefinder hosts a series of training webinars each week. We started this a few years ago and we have received really good feedback from clients! If you have a lot of new client sign ups each week, it's a great way for them to learn about the product in a one-to-many style training with a Q&A porition at the end.

Ideas for your own webinars!

☑ Overview of your product and how it will help your clients be successful

☑ Quick feature-based webinars, either your own features or iHomefinder features

☑ If there is a specific website builder that you use, a webinar covering the basic will help with overall questions from your clients

Training Webinars

Get the most value from your iHomefinder account.

Register today!

QUICK START

This is a must-see for all clients!

We'll walk you through the IDX Control Panel, lead capture & management, creating Markets (saved searches) to display on your site, MarketBoost website & email report campaigns, using the agent mobile app, and more.

WORDPRESS IDX INTEGRATION

This webinar is for clients using our Optima Express IDX plugin for WordPress or our OmniPress hosted websites. Learn how to set up and customize IDX features on your WordPress website.

WIX & SQUARESPACE INTEGRATION

If you're adding an iHomefinder account to a Wix or Squarespace site, this webinar is for you! We'll walk you through our quick and easy integration process.

Wednesdays 12–1PM Pacific

Video Training

Many of our clients find a lot of value in our video content! It's a great tool for onboarding, continued training, or to add to knowledgebase articles. iHomefinder has a YouTube channel.
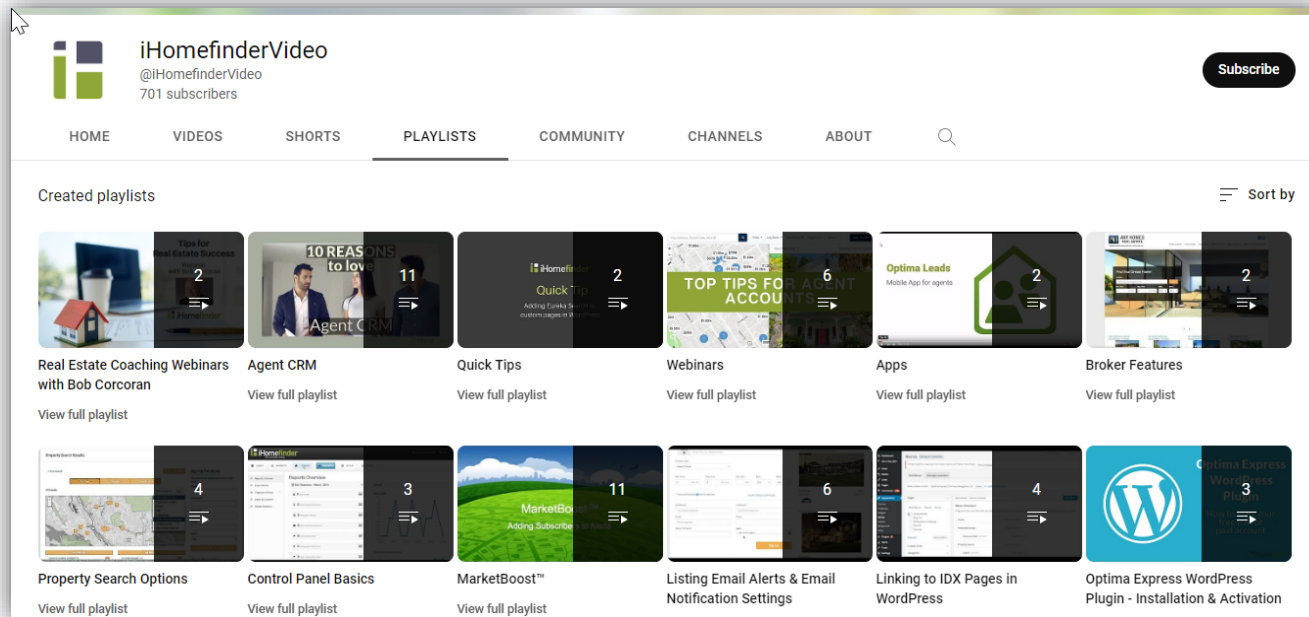
Videos Tips and Tricks

☑ Keep them short! If you want to have longer videos (like recorded webinars) that's great, but also include short clips

☑ Having them available on your website or YouTube Channel makes it easy for clients to navigate

☑ Loom is an amazing tool for quick videos when answering support questions

☑ Include links to videos in support responses

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IDX Licensing

iHomefinder

An important part of setting up your client's website is getting their MLS Data onto their site. This is done by completing the MLS Paperwork. It's important to get this approval done as soon as the client signs up so they can start using the website to get more leads. We can help with training you on this if you have any questions!

How can you make this process quick and easy for your clients?

☑ Check our coverage area page on iHomefinder.com or your Partner Portal to ensure that we cover the MLS

☑ Remind your client that they will be receiving an email to complete MLS Paperwork

☑ Once approved, setup their Agent and/or Office ID number so their listings will display as featured listings

IDX coverage areas

Explore our coverage details for your board or association

If you're in the U.S. or Canada, we likely cover your board!

Use our search tools to locate the MLS® System for your board/association and view details including:

- Associations & cities covered
- Types of listings provided
- Extra costs that may apply beyond member fees. Learn more >

VIEW COVERAGE

Welcome Emails

iHomefinder uses emails to stay connected with our clients during their first 6 months. We send out a variety of emails including emails from support and sales as well as emails highlight features that they should know about.

Automating your emails

☑ A welcome email is the best way to give your clients an overview of what they just purchased and the resources available to them moving forward

☑ Sending a variety of emails will help your clients stay engaged with you and the product

☑ We send out a monthly newsletter to all of our clients that highlights updates to the product and the real estate industry as a whole

☑ We have some emails that look as if they are coming directly from a support rep. These emails have a great response rate and will connet the client to a support rep for help

Popular email services:

Sendinblue
Mailchimp
ConvertKit
HubSpot
MailerLite
Klaviyo
AWeber
ActiveCampaign
GetResponse
Constant Contact
Campaign Monitor

Client Feedback

iHomefinder uses different surveys to gather client feedback that we can use to improve overall client satisfaction. Using different surveys through the product and client experience will give the clients lots of opportunities to give feedback
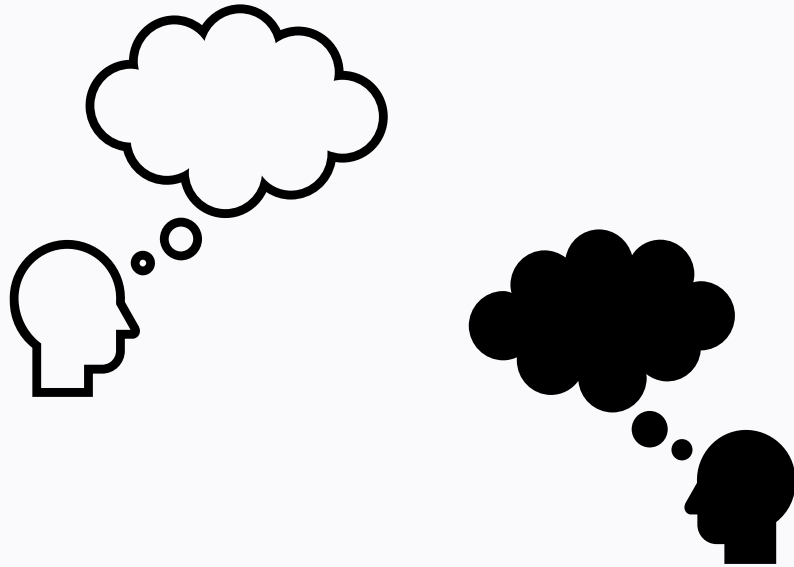
Client Feedback Tips

☑ Include surveys after completing support cases. This is a great way to find out how you can improve on customer service

☑ We use the tool Appcues to ask for client's feedback within the IDX Control Panel. We then call our clients who give us feedback to gather more information to help them resolve issues to learn more about the product
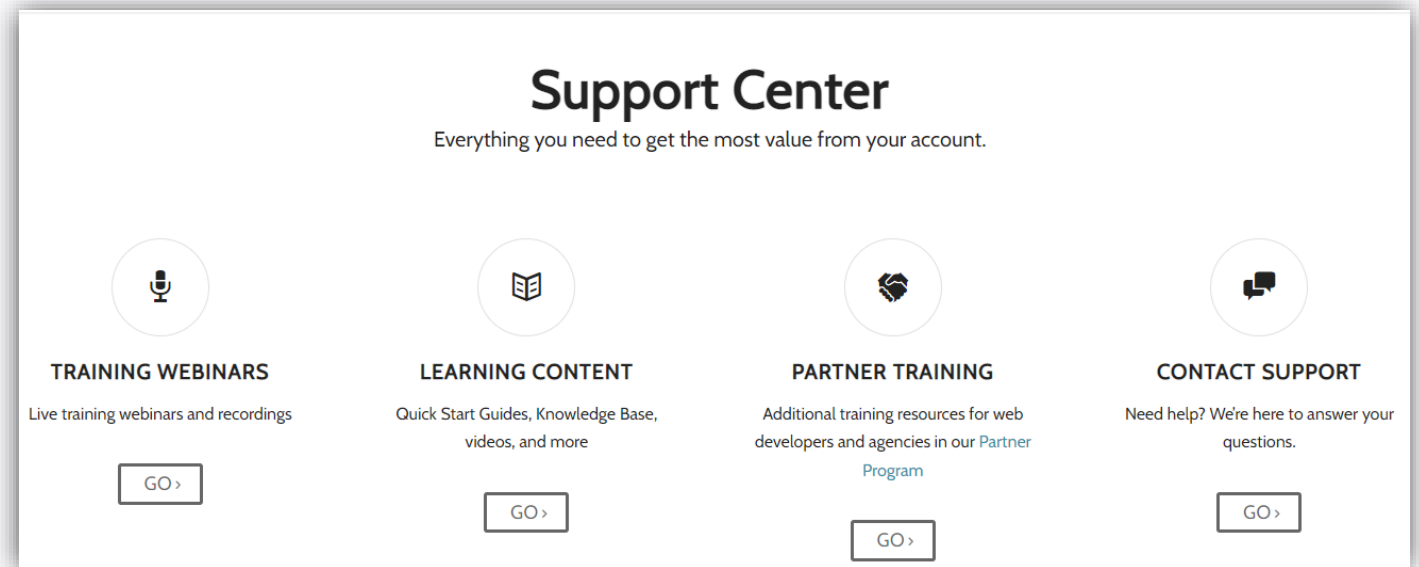
Using Appcues has been great for iHomefinder! They include the in-app feedback, popups for clients to reach out to support, and product tours!

Supporting New Clients

Working with clients in the beginning is very important to overall client satisfaction. Our Support Team works closely with our Sales Team to help with any handoffs of the clients. We want to make sure that right from the beginning our clients know that we are here to help!

Best Practices

☑ Create a simple handoff between sales and support. On some products we do a call with sales and support to make sure the client knows who to work with moving forward

☑ Train your Support Team on new features and products so they have a good understanding of what clients ask about

☑ Have your Support and Sales Teams direct clients to all the great resources you have!

Support Center

Everything you need to get the most value from your account.

TRAINING WEBINARS

Live training webinars and recordings

GO ›

LEARNING CONTENT

Quick Start Guides, Knowledge Base, videos, and more

GO ›

PARTNER TRAINING

Additional training resources for web developers and agencies in our Partner Program

GO ›

CONTACT SUPPORT

Need help? We're here to answer your questions.

GO ›

Thank you for attending!

If you have any questions, please reach out to Jade or Natalie at partners@ihomefinder.com

We are here to help you with any onboarding questions or projects that you are working on.