Course 7, Session 3 Student Notes: Onboarding, Get Them to First Value Fast

Winning the First Hour After the Sale

Big Idea: A customer who never reaches real value will leave, no matter how good your product is. The fastest path to retention is getting them to their first win quickly.

How to use these notes. These are yours to study on your own, before or after the session. Read each section slowly. Under every principle there is a **Notes** space to write what stands out to you, and a **Reflect** question to answer honestly in writing. Keep your Bible nearby. Take about 30 minutes, and end in prayer. Bring your notes and questions to the group.

Open in Prayer

Before you begin, pray this simple prayer, or your own: “Lord Jesus, You who said to strangers ‘come and see’ and let them taste who You were, teach me to bring the people I serve quickly and gently to something real and good, so they never drift away before they see why they came. Amen.”

The Scripture for This Session

Read these slowly, out loud if you can:

- **John 1:39**, “He saith unto them, Come and see. They came and saw where he dwelt, and abode with him that day.”
- **Mark 1:17 to 18**, “And Jesus said unto them, Come ye after me … And straightway they forsook their nets, and followed him.”

Reflect: Think of the last time you signed up for something new, an app, a gym, a program. How long before you either felt "yes, this was worth it," or quietly gave up and never went back? What made the difference?

The Big Picture

Let me tell you the quiet way most recurring businesses die. It is not a dramatic collapse. It is not a competitor who beats you or a scandal that sinks you. A person believes in you enough to say yes and hand over their

money, and then, in the first few days, nothing much happens. They log in and are not sure what to do. They open the box and cannot figure out the first step. They come to the first session and feel lost. And so, without any anger, without even a complaint, they simply drift. The excitement they felt at the moment of buying cools into confusion, the confusion cools into neglect, and a month or two later they cancel, or they just stop, and you never quite knew why.

That is churn, and an enormous share of it is born in the first hour after the sale. This is the great secret of onboarding: the beginning decides the end. Last session we crossed out the funnel and drew the bowtie, and we saw that in a recurring business most of the value is made on the right side, after the sale. Tonight we begin building that right side at its very first step, the moment a new customer walks through the door, because if we lose them here, nothing else on the right side of the bowtie ever gets a chance to happen.

Principle 1: Most Churn Is Born in the First Hour After the Sale.

Here is the truth the researchers have proven over and over, and Scripture knew long before them. A customer stays when they reach real value quickly, and a customer leaves when they never reach it at all. The first days after someone buys are the most fragile days of the whole relationship. The new customer has believed enough to take a step and hand over their money, but the relationship is unformed and easily lost. What happens in those first hours either draws them in or lets them wander off.

That means onboarding is not the boring administrative part of your business, the welcome email and the setup form nobody enjoys. It is one of the most decisive things you do. The first hours after someone trusts you with a yes are holy ground. That is where a fragile new relationship either takes root or quietly dies. Most owners never think about this window at all. They pour everything into getting the sale and then leave the new customer to figure things out alone. But the customer who goes quiet almost always goes quiet early, in the first days, before they ever reach real value. Win that window on purpose, and you keep people who would otherwise have slipped away.

Reflect: What does a brand new customer actually experience in the first hour, the first day, and the first week after they buy from you? Walk through it honestly.

Notes:

Principle 2: Define the First Win, the First Moment They Feel Real Value.

The people who study subscriptions have a name for the turning point. They call it the “aha moment” or the “first value,” the first time the customer actually feels the thing they were promised, not reads about it, not is told about it, but feels it for themselves. And the single most important number in a recurring business is how fast a new customer gets there. The faster they reach their first real win, the more likely they are to stay for years. The longer it takes, the more of them slip away before they ever arrive.

So the first move in good onboarding is to define the first win with real honesty. Ask yourself: for the person who just bought from me, what is the very first moment they will feel, yes, this is worth it? Not the final result. Not the full transformation that takes months. The first win, the first small but real taste of the value. For a fitness coach it might be finishing the first workout and feeling strong. For a bookkeeper it might be the client seeing their first clean, organized report. For a course it might be the student completing the first lesson and being able to do something they could not do before. You must name that first win precisely, because you cannot rush someone to a place you have never located.

Reflect: In one concrete sentence, what is the first real win for your new customer, the first moment they would actually feel the value you promised?

Notes:

Principle 3: Clear the Path. Remove Every Obstacle Between Buying and the First Win.

Once you know the first win, the second move is to clear the path to it. Look hard at everything standing between the moment they buy and the moment they reach that win, and start removing obstacles. Every extra step, every confusing screen, every unanswered question, every “we will get to that later” is a place where a new customer can get stuck, and a stuck customer drifts. The disciplines here are simple to say and hard to do: make getting started easy, remove friction, anticipate confusion before it happens, and walk them personally to that first win rather than pointing at it from a distance.

Watch how the software company Slack did this in the real world. Early on they studied their data and found a clear pattern. Once a team had sent about 2,000 messages inside Slack, that team almost always stuck around and became a lasting, paying customer, and teams that never reached that threshold usually drifted away. So Slack defined that as its first win, real usage by a real team, and built its entire onboarding to rush new teams toward it, guiding people to send messages, invite teammates, and connect their tools quickly rather than leaving them to figure it out alone. That is tonight’s lesson in the real world. Find the exact moment a customer first feels genuine value, then design everything after the sale to get them there fast. Notice too that the fix is almost always removal, not addition. Clear the road. Do not add more signs.

Reflect: Where do new customers get stuck, confused, or bored right after they buy? What is the single biggest obstacle you could remove or shrink this week?

Notes:

Principle 4: Onboarding Is “Come and See,” Not Paperwork.

Watch how Jesus does this, because He is the master of it. New, uncommitted people do not stay because you gave them more information. They stay because they tasted something real. So instead of handing curious seekers a body of teaching to master before they were allowed near Him, Jesus offered direct experience. “Come and see.” Come close, and see for yourself. He offered the value itself, not a description of it, and He offered it fast.

This reframes the whole task. Your new customer does not need more features described to them. They do not need a longer manual. They need to experience the value, directly and soon, the way those first disciples experienced a day with Jesus. So much of our onboarding front loads explanation, manuals, and setup, because it is easier for us, not because it serves the customer. Ask yourself instead what “come and see” would look like in your business. Where could you let a new customer taste real value right away, in the first hour, instead of making them study or wait? The businesses that thrive in recurring revenue are the ones that obsess over the new customer’s first experience and remove every obstacle between the yes and the first taste of what they were promised.

Reflect: Where are you handing new customers a curriculum or a waiting period when you could let them come and see, and experience real value right away?

Notes:

The Story: Come and See (John 1:35 to 39)

Read the passage. Two of John’s disciples begin following Jesus, curious but uncommitted. “Then Jesus turned, and saw them following, and saith unto them, What seek ye? They said unto him, Rabbi … where dwellest thou? He saith unto them, Come and see. They came and saw where he dwelt, and abode with him that day.” It is a small, quiet scene, and it is one of the finest pictures of onboarding in all of Scripture.

Notice three things. First, where these men are: curious but uncommitted, at the very beginning, exactly where your customer is in the first hour after they buy. Second, what Jesus does not do. He does not hand them a body of teaching to master first. That would be onboarding by paperwork, and it would have lost them. Instead He invites them into direct experience. Third, notice how fast and how personal it is. He does not schedule them for next month. That same day, “they came and saw where he dwelt, and abode with him that day.” The first value comes immediately, and it comes through presence. And here is the beautiful result: a great first experience multiplies. One of these two was Andrew, who was so genuinely helped that he went straight out and brought his brother Simon Peter to Jesus. That is what a well onboarded customer becomes, someone so helped that they carry others in.

Reflect: The two men reached first value that same day, and Andrew immediately brought Peter. How long does it currently take your new customer to reach their first real win, and what would have to be true for a new customer to want to bring someone else to you?

Notes:

Put It Into Practice

1. Name your first win. Write one concrete sentence: “The first real win for my new customer is _.” Be specific, a moment they would actually feel, not a vague outcome like “they are satisfied.”

2. Map your onboarding. List, in order, everything a brand new customer currently experiences from the moment they buy until they reach that first win: the welcome, the first email, the first login or first appointment, the first task. Write every real step, even the awkward or missing ones. Then circle the single biggest obstacle, the one place a new customer is most likely to get stuck.

3. This week’s assignment. Walk one real new customer to their first win yourself, personally, the way Jesus walked those two men into His own home for the day. Do not point them at instructions and hope. Guide them step by step to that first real result, and stay with them until they reach it. Then cut the one obstacle you circled so the next customer gets there even faster. Write one sentence about what got in the way and what helped.

Go Deeper (Optional)

- **Read:** *The Automatic Customer* by John Warrillow. See also *Product-Led Growth* by Wes Bush on getting customers to value fast.
- **Listen:** *Lenny’s Podcast*, any episode on onboarding or activation.
- **Study:** John 1:35 to 42; Mark 1:16 to 20.

Close in Prayer

“Father, thank You for a Savior who said come and see, who did not make the curious earn their way to Him but welcomed them close and let them taste His goodness that same day. Teach me to serve the people who trust me with the same grace, to clear the path to real value and walk them to it quickly and kindly. Let no one I

serve drift away confused and neglected in the first fragile days. Make my business a place of quick, generous welcome that reflects Your own heart and provides steadily for the mission. In Jesus' name, Amen."

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