YOUR  
LOGO

**COMPANY NAME**

SaaS ONBOARDING PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] for your SaaS onboarding needs. We specialize in seamless onboarding solutions that accelerate adoption, minimize churn, and ensure your users see value quickly.  
  
This proposal outlines how we can support [Client Name] in creating an effective and scalable onboarding experience for your new users.

# Problem or Opportunity

[Client Name] is looking to reduce friction in the onboarding process and improve time-to-value for new users. Without a structured onboarding strategy, users may abandon the product before realizing its full benefit.

# Proposed Solution

We propose a comprehensive SaaS onboarding implementation including setup, user journeys, and automation.  
  
Key Benefits:  
- Faster user activation and product adoption  
- Improved retention and engagement  
- Reduced burden on customer support

# Scope of Work

Our onboarding service includes:  
  
- Onboarding strategy consultation  
- Design of onboarding flow and messaging  
- Setup of product tours, tooltips, or walkthroughs  
- Email automation for onboarding sequences  
- Integration with CRM and product analytics tools  
- Success tracking and iteration

# Timeline

Estimated onboarding project timeline and delivery milestones:

|  |  |  |
| --- | --- | --- |
| Milestone | Description | Estimated Date |
| Kickoff & Planning | Onboarding goals and user flows | [Start Date] |
| Flow Design | Mockups, emails, tours, and messages | [Date] |
| Implementation | Automation setup and tool integration | [Date] |
| Launch & Review | Test, refine, and go live | [Completion Date] |

# Pricing

Estimated cost structure for onboarding services:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| Onboarding Strategy | Consultation and planning | [Amount] |
| UX & Email Flows | Design walkthroughs and emails | [Amount] |
| Tool Setup | Integration and configuration | [Amount] |
| Analytics & Testing | Performance tracking and iteration | [Amount] |
| Total |  | [Total] |

# About Our Company

[Your Company Name] is a SaaS growth agency with expertise in user onboarding and retention strategy.  
  
- Experience: [X] years in SaaS customer success  
- Tools: Intercom, HubSpot, Appcues, Userpilot, and more  
- Mission: To help SaaS businesses reduce churn and improve product-led growth

# Case Studies / Testimonials

Case Study: [Previous Client Name]  
  
- Project: New user onboarding setup for B2B SaaS product  
- Outcome: Activation rate improved by 50% in 60 days  
  
Testimonial:  
“[Your Company Name] helped us simplify and automate our onboarding. The results were immediate and measurable.” — [Client Name], [Title], [Company]

# Terms and Conditions

Payment Terms: 50% deposit upfront, 50% upon completion.  
Support: 30 days of post-implementation support included.  
Revisions: Includes up to 2 iterations based on usage feedback.

# Acceptance

To begin the SaaS onboarding setup, please sign below.  
  
Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Name: [Client’s Printed Name]  
Title: [Client’s Title]  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_