Mind matters: The psychology behind *successful onboarding and communications.*

You don't have to be a CPO (chief psychology officer) to know what motivates consumer behavior. (And yes, that's an actual title.) Even a general understanding of psychology can go along way toward creating more effective experiences.

The fact is, successful brands have raised the bar for customer expectations. So every experience matters, starting with that very first interaction. But first impressions are only a small part. Post-purchase behaviors are where customers really get to know you and see if you're going to pay off your promises.

And that's where psychology can give you an edge. Showing customers that you understand their needs throughout the customer lifecycle—and meeting them in the most effective ways—increases customer retention and loyalty.

In this article, we'll discuss best practices for onboarding and communications, as well as insights into the psychology behind them.

<u>Enrollment</u>—make it
simple, safe and consistent

Lower barriers

Consumers have more choices than ever, so it has to be easy for them to engage with your brand. Make your experiences mobile-friendly and remove any friction in your enrollment and onboarding processes.

The City of San Francisco did this with great success. They consolidated four tax payment portals into one system with automated forms. This helped them see an eight percent increase in online filings, reduce errors, and eliminate the long lines that were predicted after tax changes went into effect.

On the flip side, a study from the *[Journal of Public Policy & Marketing](#)* showed that "the California food stamp application was 13 pages long, with a complexity that would put the Internal Revenue Service to shame." In other words, the kind of barrier that keeps people from enrolling.

Create relevant experiences that build trust

Send personalized offers. Prefill forms using customer data from CRM or other systems. And make your forms adaptive, asking only for information that's relevant for each customer.

Make customers feel safe when sharing information with you. This is true for any type of organization, but especially those that require heavy exchanges of sensitive information, such as banks, insurance companies, healthcare organizations, and governments.

Harvard Business Review reports that trust is essential to forming an intention to purchase, but the psychology behind what actually builds trust might surprise you. A study in the journal *Computers in Human Behavior* showed that when making decisions involving risk, consumers tend to rely more on associative reasoning (intuition) than on deliberative reasoning (logic). They are more influenced by things like experience, color, and the aesthetics of the website than by deliberative factors such as privacy and security policies.

So while security is imperative, a great website and app experience could be the difference between someone choosing to engage versus moving on.

You can also build trust by providing something for free with nothing expected in return. Give your customers compelling and educational blog articles, thought leadership papers, guides, and infographics.

Create consistency

A great desktop experience has to cross over to mobile—and continue through every interaction. Every single form, whether you have 15 or 15,000, should feel like it comes from the same company and offer the same ease—no matter how many different departments or different compliance issues you have.

"Your customers trust you to provide an easy and simple experience. It's why they chose your brand in the first place," says Adrienne Tsai, product marketing manager at Adobe. "But if you start with a great onboarding process, then provide a less than stellar experience later on, you break that trust."

While that seems perfectly logical, psychology plays a role. [McKinsey](#) reports that the most powerful indicator of customer happiness is consistency. When everything feels familiar and consistent for your customers, it validates their decision to engage with you.

This is supported by the psychological concept called the [Baader-Meinhof phenomenon](#), or frequency illusion. Think about shopping for a new car. Once you choose a certain model and do the research on it, suddenly you start seeing that car everywhere. That's because your brain gets excited about learning something new and selective attention occurs. Now that you're looking for it, you're finding it. Then confirmation bias happens, and you start agreeing with yourself that you've made the right decision.

However, we don't just like something because we see it frequently. We need to believe in it and have that belief reinforced.
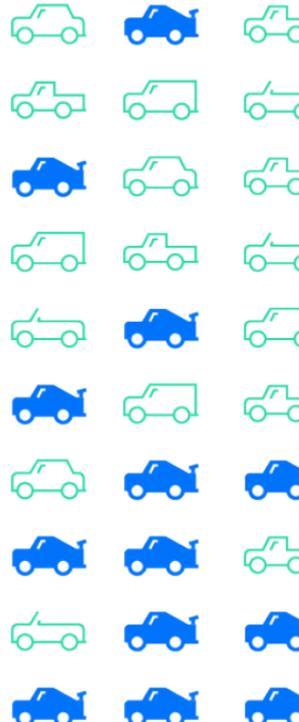
Onboarding—*welcome, reinforce, repeat*

Make customers feel good about their decisions

It's human nature to justify our actions. So in order to affirm and strengthen your customers' beliefs, pay attention to their post-purchase behaviors and positively reinforce the relationship. Send personal messages. Create attractive offers. And mark milestones, like when Shutterfly sends photos asking, "Remember seven year ago?"

If you simply "get them and forget them," you run the risk of cognitive dissonance. This describes the feeling of tension in the brain when you have two conflicting ideas, beliefs, or emotional reactions. If your customers' experience is great to begin with, but breaks down soon after they purchase or enroll, they feel discomfort, which can lead them to disengage with you.

Drew Westen, professor of psychology and psychiatry at Emory University, used functional magnetic resonance imaging (fMRI) to show that when we try to process information that creates dissonance, the reasoning parts of

the brain virtually shut down. But when the conflict has been resolved, the reward circuits light back up. This means every interaction after enrollment has the potential to either cause conflict or trigger the reward circuits that can lead to a fully engaged and loyal customer.

Create a sense of belonging

We all have an innate need to belong, as outlined in Maslow's hierarchy of needs. He theorized that once our basic survival needs are met, our third need is love and belonging.

So it's not surprising that in a [Deloitte study](#) on emotion-driven engagement, a majority of long-term customers used words like *love, happy,* and *adore* about their favorite brands—as if they were

Self-actualization

Self-esteem

Social belonging

Safety needs

Physiological needs

talking about family, friends, and pets. That's because we aren't simply buying, we're buying in—to an experience, shared values, and a community.

Consider Apple, whose customers are intensely loyal. They'll stand in long lines to get the latest device. Hang out in Apple stores. Go online to research and reaffirm that loyalty. And respond swiftly to those who don't share their beliefs.

This kind of loyalty starts by being welcomed into your fold. So send them welcome kits and provide ways to keep engaging with your brand. Encourage dialogue and offer opportunities to connect and share with other users. Set up user groups and tweet about positive brand experiences, as many successful brands are doing.

Tap into the power of emotion

While we like to think of ourselves as logical, we're more likely to act when something triggers an emotional response. It's no wonder the words *motivate* and *emotion* both contain the Latin root word *mot* which means *to move*.

The Deloitte study cited previously found that while rational considerations like price, loyalty programs, or promotions are top of mind when customers initially interact with a brand—and can also prompt users to end a relationship—emotion is key for everything in between. A positive emotion toward a brand has a very strong influence on consumer loyalty. It helps create the deep connections that make us love a brand and fulfil our need for belonging and trust.

Think about doing your taxes. The thought probably triggered an instant negative emotion. That's why tax software makes the filing process simple and emotionally rewarding to use. Rather than filling out a long and complicated tax form, it welcomes you by name, then walks you through one step at a time in an easy and reassuring way, almost like you were chatting with a trusted friend. And it continually assures you that you're getting every deduction you're due—generating feelings of confidence, trust, and even relief.
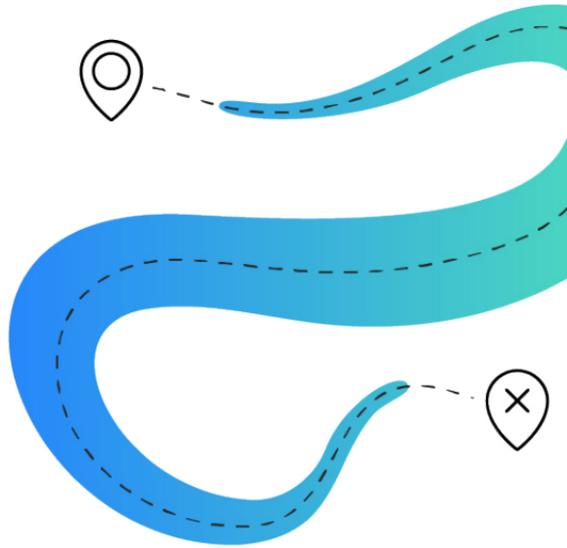
You can generate positive emotions by making customers feel understood. Use customer profiles to create real, personalized connections with each customer—at scale. Make the experience relevant to their preferences and where they are in the journey. And keep them happy with attractive offers and truly useful content.

Ongoing communications —*validate experiences, reward engagement*

Foster an ongoing relationship

Enrollment and onboarding are just the beginning of the customer relationship. To generate long-term engagement and loyalty, it's important to continually validate the relationship and nurture their sense of esteem, which Maslow puts just above our need for love and belonging.

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Create a sense of achievement

Everyone needs to feel status and respect. Let your customers see what they've achieved as they forge deeper connections with your brand. Use status bars, badges, and other tactics to show their progress. And recognize and reward their accomplishments—like the health insurance company that sends members fitness trackers and pays a dollar for every day they meet their step goals.

Another powerful way to reward customers is to surprise and delight them with content they might not expect. Novel experiences give our brains a rush of the pleasure chemical dopamine. So keep giving them opportunities to learn. And continue to create personalized information that helps them get more out of your product or service.

A good example is the Sydney Opera House. To keep the visitor experience alive, they developed the Backstage section of their website with a wealth of stories ranging from their history to emerging artists—giving both visitors and audiences the inside scoop. It "profiles news and content that really draws back the curtain on everything that goes on at the opera house," says Christina Erskine, chief marketing officer for Sydney Opera House.

Maintain the quality and consistency of the experience

While consistency is the most powerful indicator of happiness, it's also an important predictor of overall customer experience and loyalty. A disappointing experience at this point in their journey, like not being able to find a particular form on your website, or having to print one and sign it, can have a big impact. So make information easily accessible and changes relatively easy. And make sure you have the utmost security. A breach can be absolutely devastating for your customer relationship.

Listen to your customers

Address their needs so they know they've been heard. And adjust each experience based on the information they're giving you. Then, continue to learn from the ongoing relationship. Figure out what's working. And what isn't. It's important to remember that a single negative experience has four to five times greater impact than a positive one.

Better psychology,
better experiences, better efficiencies

According to a Regalix report, the top benefits from customer onboarding activities are customer satisfaction (89 percent), customer engagement (68 percent), and product adoption (68 percent). So it pays to understand the psychology behind the most effective practices. Not only will you create better experiences for your customers, you'll create better efficiencies for your organization.

Adobe can help

Adobe Experience Manager Forms can help streamline and improve the onboarding and communication experience from initial contact to long-term loyalty. By removing the friction and personalizing each customer's journey, you can make your brand experiences consistent, effortless, and meaningful. The kind that make people want to do business with you again and again.

Learn more

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