# Voice AI for Onboarding

## What the *hell* it is and how it's used

# What the *hell* is it?

**Voice AI scales high-touch onboarding to every user.** It combines real-time conversation ⊞ screen awareness ⊞ deep product expertise into a single guided experience.

# The problem your team already knows.

You can sign 50 new customers this month.
You cannot hire 50 CSMs to onboard them.

Docs, videos, and in-app guides cannot
answer questions mid-setup, see where users
go wrong, or adjust when someone gets lost.
Every user gets the same experience,
regardless of what they need.

Enterprise customers slow-drip onboarding. Mid-market churns
before reaching value. SMB never fully activates.
Your CSMs spend their days re-running the same calls instead of
expansion and retention work that moves the business.

This is a tooling problem. The gap between what your best
customers receive and what everyone else gets is now closeable.

# Voice AI onboarding finally solves it <span style="color:purple">at scale.</span>

**Voice AI agent runs onboarding calls. Users talk to it, share their screen, and get walked through their specific setup.**

**It sees their product state, spots errors in real time, and adjusts pacing when they get stuck. Answers questions mid-flow. No booking, no waiting.**

Real-time, context-aware guidance for every user. CS teams stop running procedural calls. SMB customers activate faster. Enterprise customers onboard at scale without burning CSM hours.

# Where it fits in your stack.

## Voice Agents (Obi)

Virtual CSMs. Proactive onboarding, training, and high-value guided experiences at scale.

## Support Chatbots

Ticket deflection. Repetitive text-based questions with structured answers.

## Docs / Videos

Training data for AI. The knowledge base that feeds voice and chat agents.

## Human Calls

The 20%. Relationships, strategic conversations, complex solution engineering.

# Where it fits into your team.

CS teams using Obi shift from reactive repetition to proactive high-value work. Obi handles 80% of onboarding and support autonomously, monitors another 15% and escalates intelligently, leaving only 5% for manual intervention

## 80%

### Obi Handles Autonomously

Product walkthroughs, guided setup, capability questions, integration configuration, multilingual onboarding, session resumption, and pacing adjustments.

## 15%

### Obi Handles, Human Monitors

Solution engineering for specific business contexts, complex multi-system troubleshooting, sessions with frustration signals, and lower-confidence edge cases.

## 5%

### Obi Triages, Human Takes Over

Backend account issues, billing and contract conversations, churn-risk moments, explicit human requests, and bespoke implementation work.

# What the data shows.

# Users engage with AI onboarding just like with a human.

The average user spends 31 minutes with Obi across multiple sessions - meaningful time, not a quick click-through. They prefer actionable, focused sessions around specific tasks, not marathon training events.

Usage spreads across the full day, into evenings, and through the weekend. Users engage when they are ready to take action, not when a CSM is available. The pattern holds across time zones, suggesting this is not an exception but how users prefer to learn.

## 31 min

average time users spend in conversation with Obi

# Users don't just follow the guide - they use it to get real work done.

Users do not treat Obi as a tutorial to sit through. They configure their product, troubleshoot live issues, connect integrations, and build automations - all within the same session. The range of what gets accomplished goes well beyond orientation. The workflows users most commonly work through with Obi:

## Account setup

Connecting channels, configuring preferences, setting up team access

## Integration configuration

Connecting third-party tools, verifying connections, troubleshooting sync

## Workflow automation

Setting up rules, triggers, AI agents, and automated responses

## Feature walkthroughs

Understanding what the product can do, applied to the user's specific context

## AI configuration

Connecting knowledge sources, defining behavior and tone, building transfer and escalation rules, and validating prompts and configurations live with Obi.

# Screen sharing multiplies the engagement.

**Users spend 3.6x longer and ask 3x more questions.**

Screen sharers spend 3.6 times longer with Obi and ask nearly three times more questions. Sharing a screen turns the session from listening to instructions into working together on the user's actual setup. Obi sees what the user sees, responds to their specific product state, and guides them through real configuration in real time.

# 3.6 $^X$

**screen sharers spend in conversation vs. non-sharers**

# Users ask questions, a lot of them.

The average user asks 11.7 questions. 92% ask at least one. These are not generic queries. They are specific to each user's setup, their business, and the decision they are making right now. What users ask about:

**Capability**

Can the product do this specific thing for my use case? What are the limits?

**Procedural**

How do I complete this step? Which setting should I choose?

**Troubleshooting**

Something is not working. Obi resolves it in real time.

**Real-world context**

How should I configure this for my specific business or industry?

Users are not passively consuming. They are steering the session toward what they need and applying it immediately

## 11.7

questions are asked on average by an user

# Questions are resolved with little escalation.

87% of questions are resolved without escalation. The rest are edge cases: niche admin settings, account-specific issues, configurations not yet in the knowledge base.

### What Obi resolves:

Product setup and configuration, integration troubleshooting, feature capability questions, workflow automation guidance, third-party system troubleshooting.

### What gets escalated:

Backend account issues, billing and contract conversations, niche knowledge gaps, and implementations requiring offline configuration.

# 87%

## questions resolved without escalation

# Users return - on their own terms.

**50% skip ahead to the section they need. 38% open with their own question rather than following the default flow.**

Users treat Obi as a resource they return to when they are ready for the next feature, the next integration, the next workflow. Onboarding is not a phase. It is a layer of product support that is always available, always waiting, and never in a meeting.

## 50%

of users skip ahead
to a specific section

## 38%

open with their
own question

# Onboarding doesn't end.

**66% of engaged users return for additional sessions. Users treat Obi as an ongoing resource they access in bite-sized chunks, not a one-time onboarding event.**

The implication: onboarding isn't a phase. It's an always-available layer of product support. Users come back when they're ready for the next feature, the next integration, or the next workflow. On their schedule, on demand.

# 66%

**of users return for additional sessions**

# What users love.

Five consistent themes from how
users respond to Obi:

### Conversational guidance

A coaching dynamic, not a tutorial. Users respond naturally and engage like they're talking to a colleague.

### Learning by doing

Guided through their actual product, with their actual data, making real changes as they go.

### Asking questions mid-flow

Interrupt with a real question, get an immediate answer. Impossible with docs or video.

### Always available.

No scheduling, no waiting. Users engage when they're ready, not when a calendar slot opens.

# What users expect.

Five expectations that, when met, drive the highest engagement:

### Show me, don't just tell me.

Screen sharing + voice + captions. The 3.6× multiplier proves multimodal works.

### Don't make me listen to what I know

50% skip ahead. Respect that and earn longer sessions and more return visits.

### Short, focused sessions.

Built around specific tasks. Users want outcomes, not overviews.

### Confirm I did it right.

Checkpoint moments where Obi validates completion. This is where trust is built.

# Obi in *your* team.

# Operational Models.

## High-Touch Enhancement

CSMs and onboarding teams stay in the driver's seat. Obi covers the procedural parts between calls: walkthroughs, configuration, integrations, and training. Users get help in the moment they're actually doing the work, not days later on a scheduled call. Teams use their call time for use cases, strategy, and problem-solving instead of screen-sharing through settings menus. Obi handles the 80% that is procedural so the CSM focuses on the 20% that requires judgment and relationship.

*Best for: Mid-market and enterprise accounts with active CSM or onboarding team involvement.*

## Frontline Coverage for Smaller Accounts

Obi runs onboarding and training end-to-end. After every session, CS gets a detailed report: what was covered, where the user got stuck, what was left unfinished. CSMs only step in when the data tells them to. This turns scaled CS from "less touch" into "right touch" without adding headcount.

*Best for: SMB and long-tail accounts where dedicated CSM coverage isn't viable.*

## On-Demand Training and Solution Engineering

Onboarding rarely gets customers 100% up to speed. New use cases come up, teams try things on their own, and they need guidance implementing them. The typical answer is webinars and group training, but these are generic classroom sessions that struggle to drive real engagement or outcomes. Obi replaces them with on-demand 1:1 training and solution engineering. Every session is specific to the user's actual setup, not a general walkthrough. More impact, no added headcount.

*Best for: All segments. Replaces webinars and group sessions for SMB/mid-market. Supplements CSM-led enablement for enterprise.*

## Training on the Edges

20% of a company's employees turn over every year. The people who were trained and saw value in the software leave. New people come in cold. The typical solution is an LMS or knowledge base, but end users don't engage with that format. They don't want a lecture, they want to get things done. Obi provides ongoing on-demand training so adoption stays high across the full customer lifecycle. No surprises at renewal.

*Best for: Mid-market and enterprise where multiple end users access the platform and staff turnover creates recurring training gaps.*

# How to think about ROI.

The return on voice AI onboarding builds across five layers.

**Layer 1**

## Time savings

A CSM running 8 onboarding calls a day costs roughly $35—45 per call. Shifting even 30—40% of that volume to Obi creates immediate savings.

**Layer 2**

## Support absorption

Every question answered during onboarding is a ticket that never gets created. At $15—25 per ticket industry average, that is $175—290 in absorbed cost per user.

**Layer 3**

## Coverage Economics

24/7 coverage at zero marginal cost. Going from 50 to 300 monthly onboardings does not change the price.

**Layer 4**

## Retention Leverage

The multiplier. A 2—3 point improvement in 90-day retention, applied across volume and LTV, typically returns 10—50 times the cost.
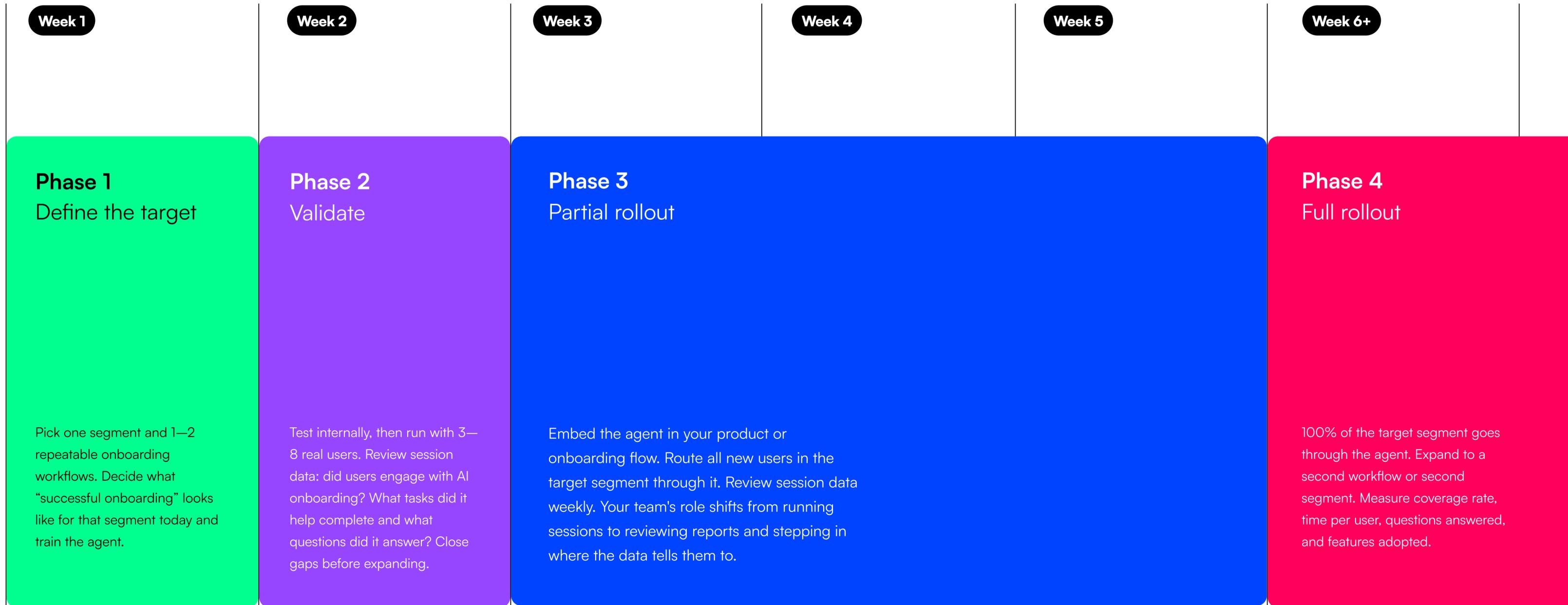
**Layer 5**

## Compounding Intelligence

Compounding intelligence Every Obi session generates structured data on what users struggle with, skip, and ask. Over 6—12 months, this becomes a strategic asset that informs product, content, and CS strategy simultaneously.

# Deployment blueprint.

A deployment blueprint for teams ready to move from static onboarding to voice AI.

## Phase 1
### Define the target

Pick one segment and 1—2 repeatable onboarding workflows. Decide what "successful onboarding" looks like for that segment today and train the agent.

## Phase 2
### Validate

Test internally, then run with 3—8 real users. Review session data: did users engage with AI onboarding? What tasks did it help complete and what questions did it answer? Close gaps before expanding.

## Phase 3
### Partial rollout

Embed the agent in your product or onboarding flow. Route all new users in the target segment through it. Review session data weekly. Your team's role shifts from running sessions to reviewing reports and stepping in where the data tells them to.

## Phase 4
### Full rollout

100% of the target segment goes through the agent. Expand to a second workflow or second segment. Measure coverage rate, time per user, questions answered, and features adopted.

# Ready to try Obi?

**Book a call with our team.**

We'll help you refine the use cases, train the agent, and roll out from pilot to full deployment.

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