

JTBD Onboarding: The SR Fast Track



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Results!



1. Post-Onboarding Retention Improvement – 65% to >95%
2. Customer Onboarding Time Reduction – 90 days to 3 weeks
3. Team Reduction – 50%





1. Account Growth
2. Customer Acquisition Cost (CAC)
3. Customer Lifetime Value (LTV)

Hyper-Growth



65% Retained Post-Onboarding



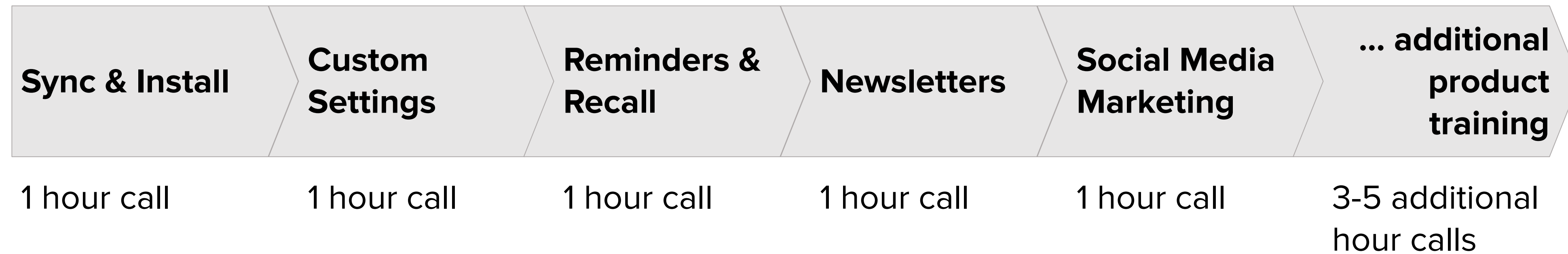


Step 1: Buy-in

A close-up photograph of a person's hand holding a camera lens. The lens is held in a way that its front element is visible, showing a clear view of a sunlit forest with tall, thin trees and a grassy floor. The background is a blurred forest scene, matching the view through the lens. A semi-transparent dark blue banner is overlaid across the center of the lens, containing white text.

STEP 2: CHANGE FOCUS

60-90 day onboarding process

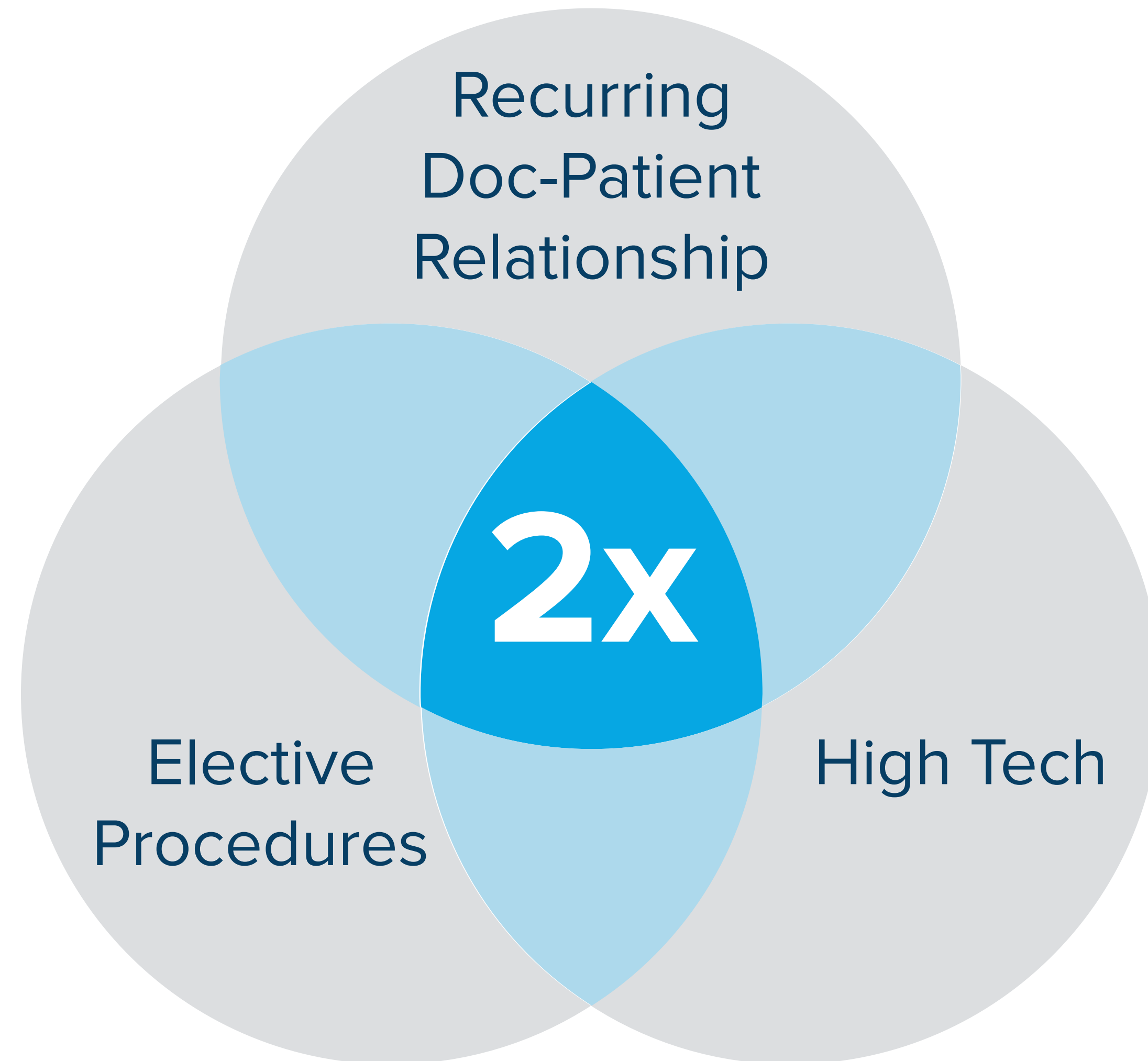


A close-up photograph of a person's hand holding a camera lens. The lens is held in a way that the viewer can see through it. The lens is black with silver-colored metal rings. The background is a blurred green forest. The text "STEP 2: CHANGE FOCUS – ASK THE RIGHT QUESTION" is overlaid in white on a dark blue horizontal bar across the middle of the image.

STEP 2: CHANGE FOCUS – ASK THE RIGHT QUESTION



STEP 3: ANALYZE CUSTOMER DATA



A close-up photograph of a person's hand placing a wooden block on top of a stack of other wooden blocks. The blocks are arranged in a stepped pattern, with the stack being taller on the right side. The background is a plain, light-colored wall.

STEP 4: REPLICATE

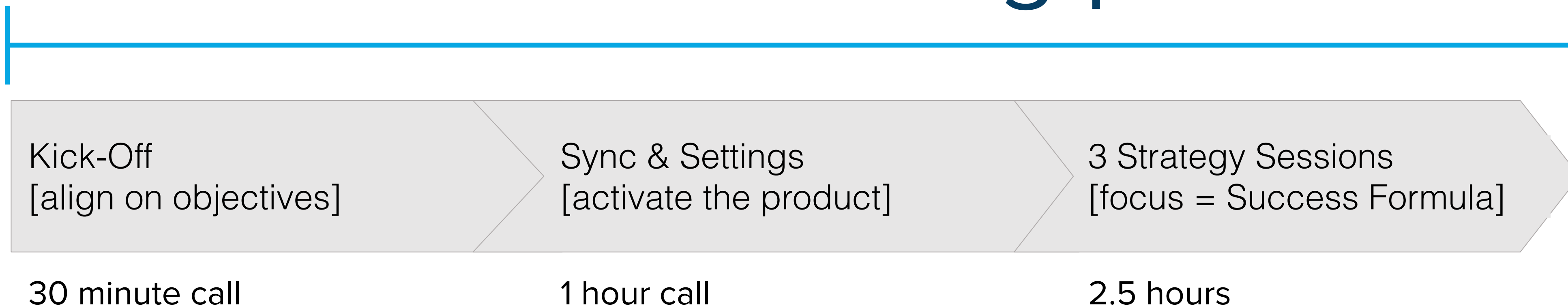
SR ***FAST TRACK***TM

SR *FAST TRACK*TM

- Outcomes. Not happiness.
- Solutions. Not products.
- Expertise. Not customization.

SR FAST TRACK™

3 week onboarding process




THE SUCCESS FORMULA

SR FAST TRACK™

$$\begin{aligned}
 \uparrow \text{Visits} &= \uparrow \text{Scheduled} - \downarrow \text{Not Kept} \\
 &= [\text{Patients} \times \text{Appts}] - [\text{No Shows} + \text{Cancels} - \text{Replacements}]
 \end{aligned}$$

THE KEYS TO SUCCESS:

 Increase Revenue


=

Session 2

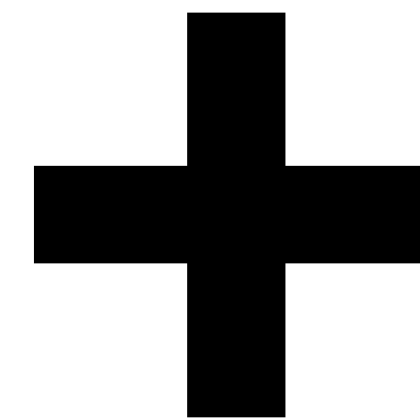
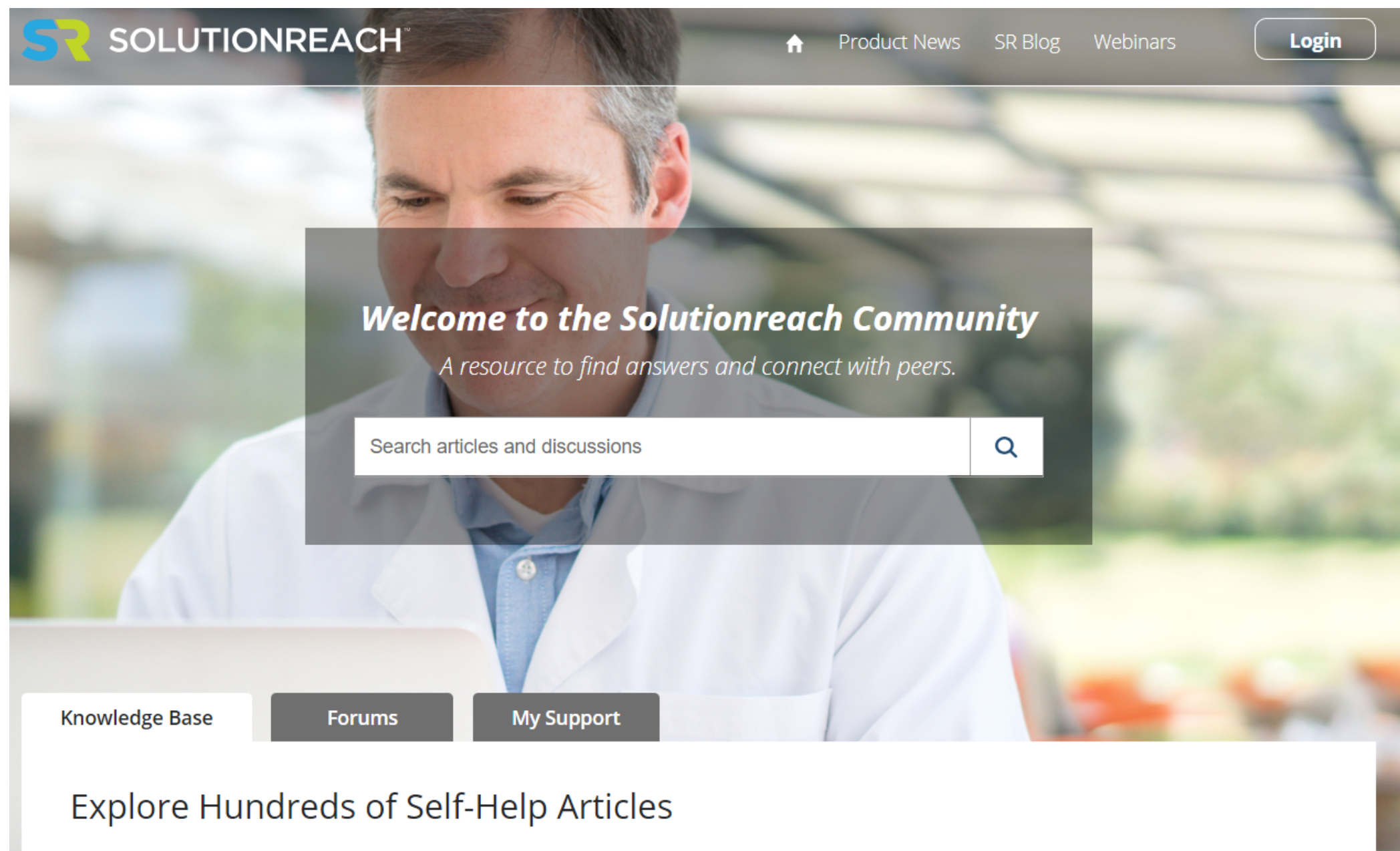
 More Patients

 More Appts

Session 1

 Reduce No shows & Cancels

 Replace & Reschedule



So What

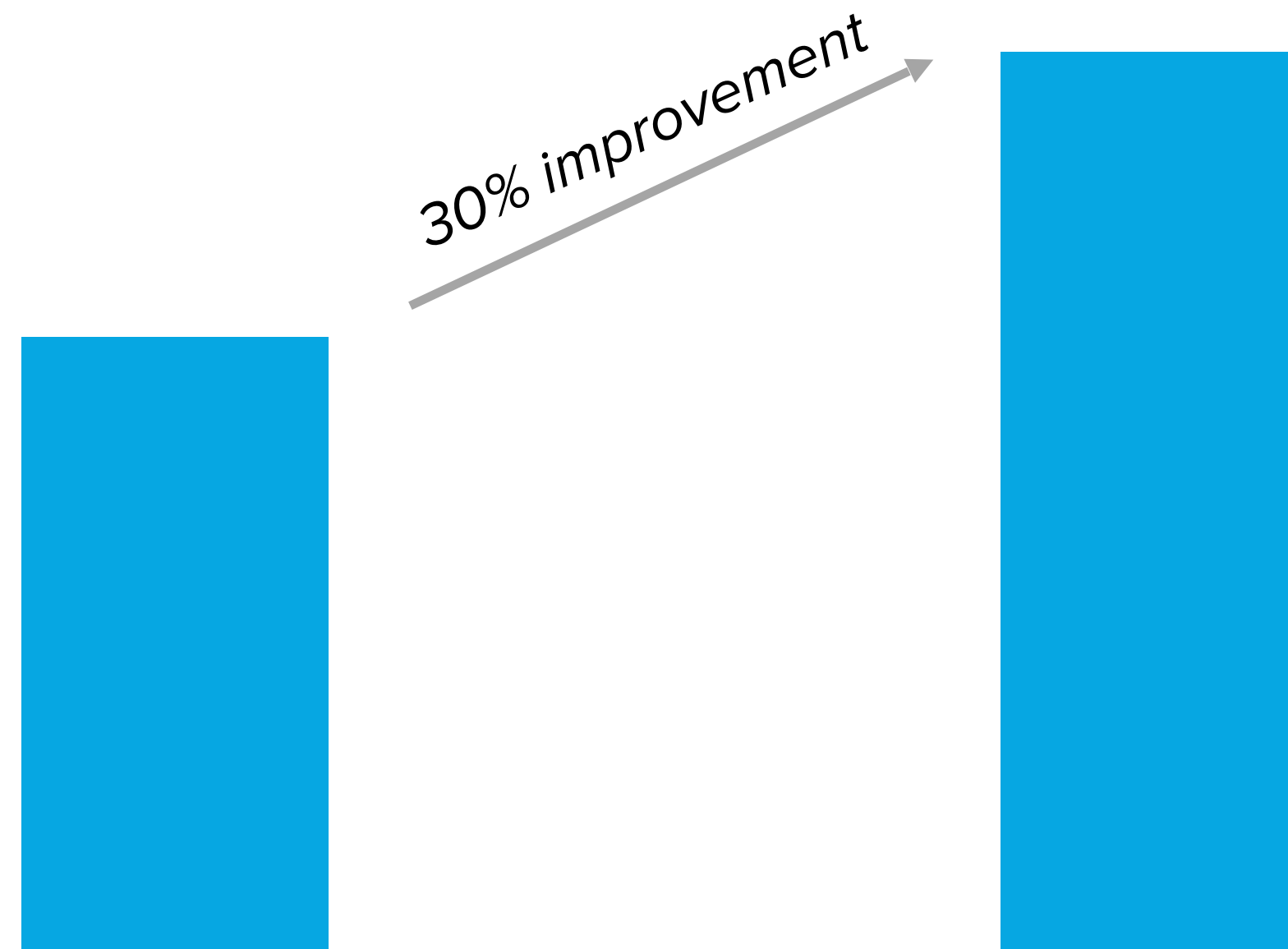
>Customer Focus

> Delighted Customers

> 70 NPS

>SaaS Metrics

> Early Retention



> Customer Lifetime Value

3x



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