

CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

# EXECUTING A FLEXIBLE YET REPEATABLE ONBOARDING FRAMEWORK



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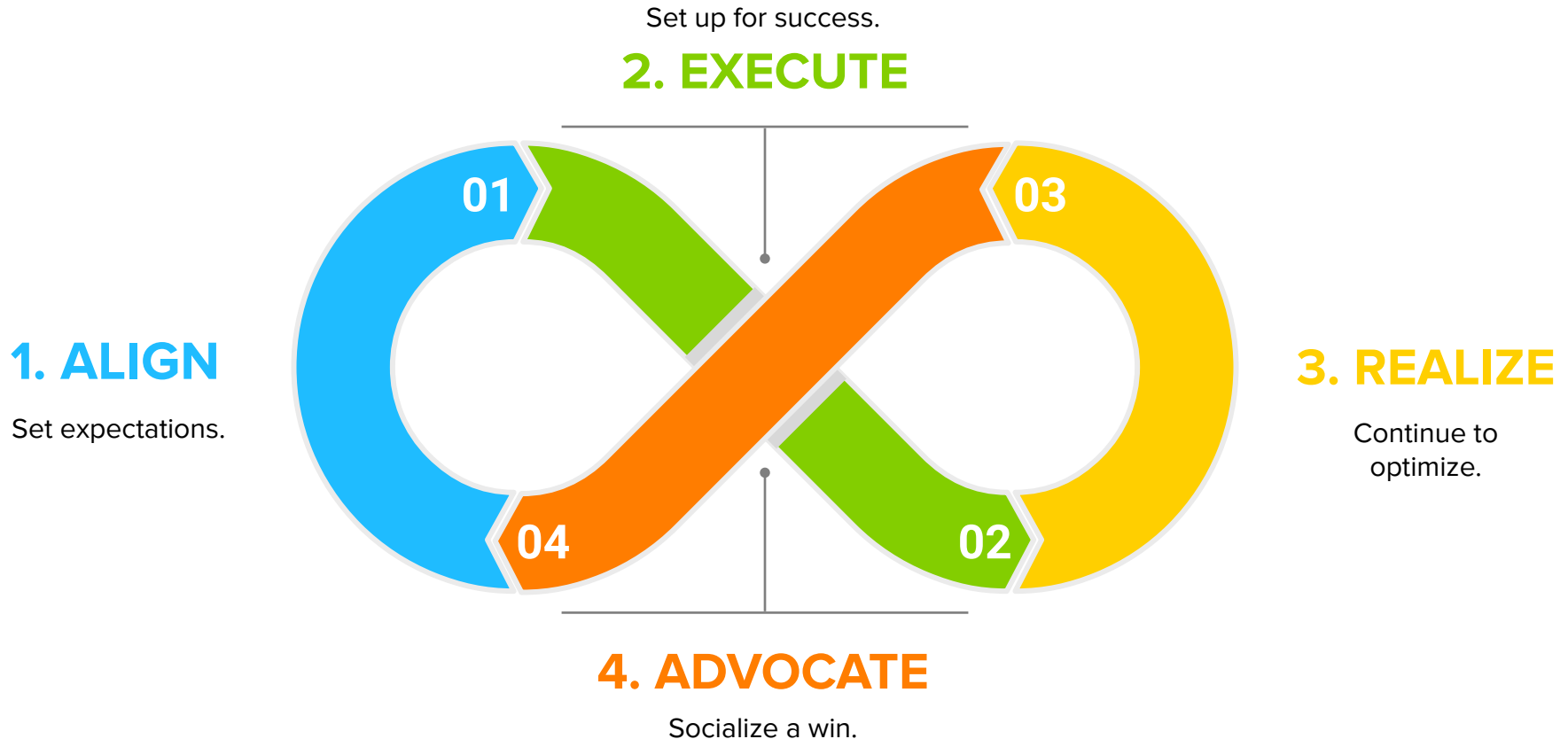
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client**success**

A WELL THOUGHT OUT  
AND EXECUTED  
CUSTOMER ONBOARDING  
WILL SUPPORT THE  
LONG TERM SUCCESS OF  
YOUR CUSTOMER.

CUSTOMER  
ONBOARDING IS NOT A  
ONE-SIZE-FITS-ALL  
PROGRAM.

# ONBOARDING IN THE CUSTOMER LIFECYCLE



# DESIGNING ONBOARDING

## DEFINE

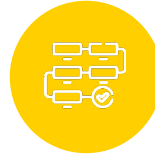
Define what it means to be fully onboarded with your solution.



2

## DESIGN

Design the process your customers will go through as part of onboarding.



3

## DETERMINE

Determine what it will take to get to that state of onboarded.



4

## DELIVER

Execute your new onboarding program and iterate as needed.



# DESIGNING ONBOARDING



## DEFINE

Define what it means to be fully onboarded with your solution.

- Map out from a people/process/technology perspective what it would mean to be onboarded on your solution
- Ensure that your onboarding process supports your core business use cases
- Define your success milestones
- Understand that onboarding can look very different for different types of customers

# DESIGNING ONBOARDING



## **DETERMINE**

Determine what it  
will take to get to  
that state of  
onboarded.

- Map out the steps to get your customer onboarded
- Understand where your customers are starting from and if this should impact their experience
- Determine the methods you will leverage to execute your onboarding
- What needs to happen on their end and what needs to happen on your end

# DESIGNING ONBOARDING



## DESIGN

Design the process your customers will go through as part of onboarding.

- Design your onboarding journey based on the elements you've determined are required to make your customers successful
- Prepare assets to assist them along the way - videos, training materials, documents, project plans etc.
- Map out a tentative timeline and game plan for the process
- Create intervention plans for when things don't go as planned



# DESIGNING ONBOARDING



## **DELIVER**

Execute your new  
onboarding  
program and iterate  
as needed.

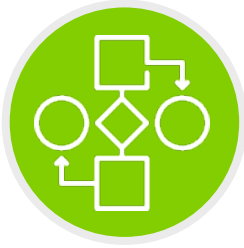
- Identify a cohort of customers to test your new program with - if you can bring them into the process
- Map out points of friction for the customer and gaps with assets and materials
- Are there ways to accelerate or optimize the process?
- Make changes and roll it out

REDESIGNED  
ONBOARDING AT  
CLIENTSUCCESS

# ONBOARDING STARTS WITH WHY



DEMOCRATIZE  
DATA



OPERATIONALIZE  
PROCESS



DRIVE  
EFFICIENCY



MITIGATE  
RISK



IDENTIFY  
GROWTH



INCREASE  
VISIBILITY

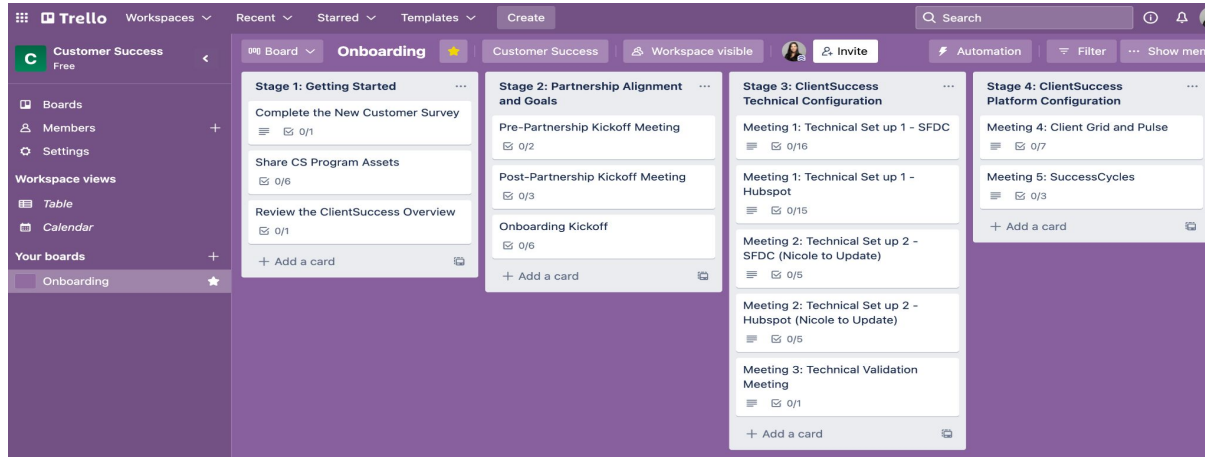


SCALE WITH  
EASE

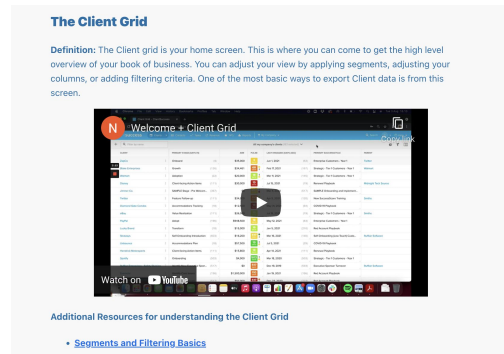
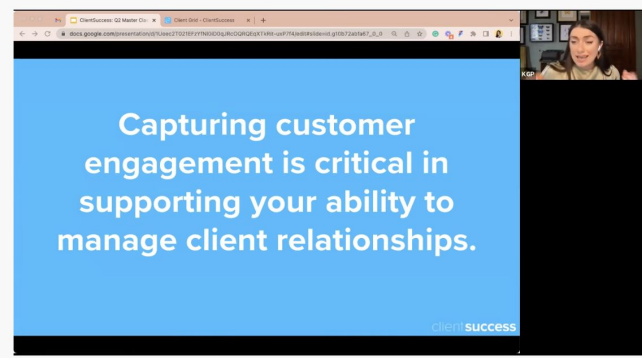
# ONBOARDING CONTINUES WITH WHAT



# AND CONTINUES WITH HOW



- Recurring 1:1 meetings with designated CSM following a comprehensive project plan
- Extensive Knowledge Base with videos, guides and more to accelerate independent learning
- Ongoing live Master Class trainings to help customers maximize their value and engage with experts
- Clear next steps and milestones



# OUR WHEN ... DEPENDS

## Onboarding Alignment

Align on the Onboarding Program, set expectations and discuss the program objective.  
Review next steps.

## Integrations Workshop

Hands on workshop to complete all integrations with ClientSuccess.

## Module Design 1

First design module based on customer's priorities.

Second design module based on customer's priorities.

Third design module based on customer's priorities.

Review of the Onboarding Program and confirmation that the customer feels empowered to move forward.

## Module Design 2

## Module Design 3

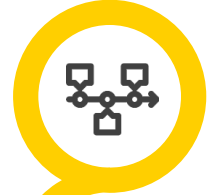
## Onboarding Wrap Up

# BENEFITS OF OUR PROGRAM

TAKES INTO ACCOUNT  
OUR CUSTOMER'S  
OBJECTIVES



FOCUS ON VALUE AND  
MILESTONE ACHIEVEMENT  
NOT TIMELINES



ALIGNS WITH CUSTOMERS  
ON THEIR PERCEPTION OF  
ONBOARDED



CONTINUED ASSISTANCE  
ON PLATFORM  
CONFIGURATION AND  
OPTIMIZATION



# ONBOARDING MISTAKES TO AVOID

**1.**

Stop using the Onboarding Experience you designed at your last company and expect it to work.

**2.**

Don't design for a timeline, design for an outcome.

**3.**

Don't design a set it and forget it program; go back and optimize it based on feedback.

**4.**

Don't ignore the lagging indicators; if your customers fail to adopt your solution dig in.

**5.**

Onboarding customers in different segments, industries, stages of maturity should all look different.



THANK YOU