CUSTOMER SUCCESS LEADERSHIP BOOTCAMP

EXECUTING A FLEXIBLE YET REPEATABLE ONBOARDING FRAMEWORK



Chief Customer Officer ClientSuccess

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TUESDAY, APRIL 26, 2022 2PM EST/ 11AM PST

clientsuccess

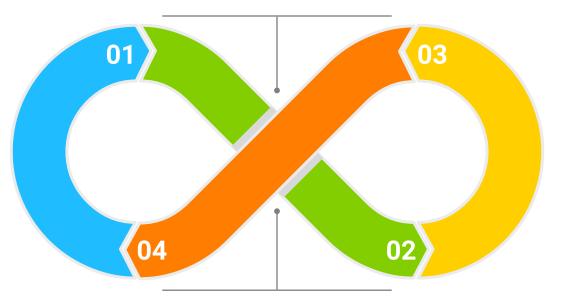
A WELL THOUGHT OUT AND EXECUTED CUSTOMER ONBOARDING WILL SUPPORT THE LONG TERM SUCCESS OF YOUR CUSTOMER.

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

# ONBOARDING IN THE CUSTOMER LIFECYCLE

Set up for success.

#### **2. EXECUTE**



**1. ALIGN** 

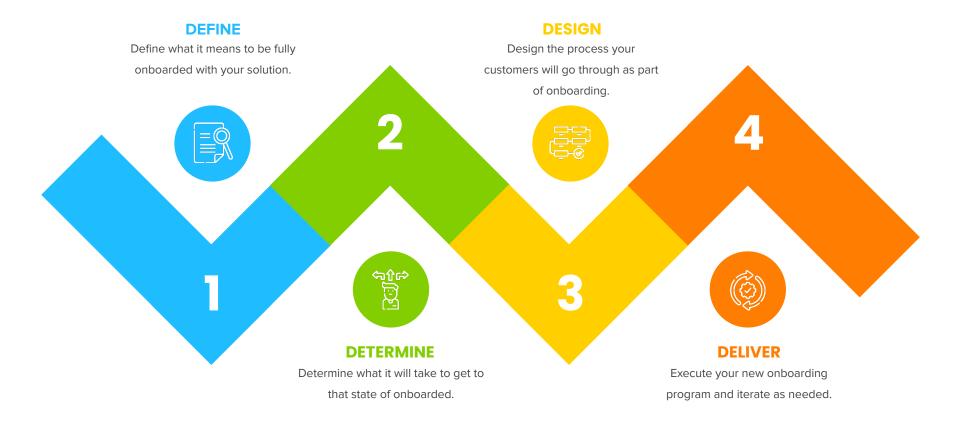
Set expectations.

**3. REALIZE** 

Continue to optimize.

#### **4. ADVOCATE**

Socialize a win.





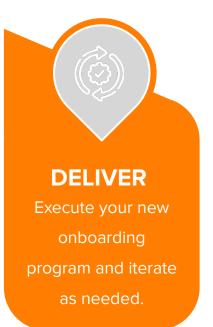
- Map out from a people/process/technology perspective what it would mean to be onboarded on your solution
- Ensure that your onboarding process supports your core business use cases
- Define your success milestones
- Understand that onboarding can look very different for different types of customers



- 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



- 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



- 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



DEMOCRATIZEOPERATIONALIZEDRIVEMITIGATEIDENTIFYINCREASESCALE WITHDATAPROCESSEFFICIENCYRISKGROWTHVISIBILITYEASE

## ONBOARDING CONTINUES WITH WHAT



### AND CONTINUES WITH HOW

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			Meeting 2: Technical Set up 2 - Hubspot (Nicole to Update) © 0/5	
			Meeting 3: Technical Validation Meeting	
			+ Add a card	



Capturing customer engagement is critical in supporting your ability to manage client relationships.

#### **The Client Grid**

Definition: The Client grid is your home screen. This is where you can come to get the high level overview of your book of business. You can adjust your view by applying segments, adjusting your columns, or adding filtering criteria. One of the most basic ways to export Client data is from this screen.

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- 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	Integrations Workshop	Module Design 1	
Align on the Onboarding	Hands on workshop to	First design module	e based
Program, set expectations and discuss the program objective.	complete all integrations with ClientSuccess.	on customer's pric	prities.
Second design m	nodule T	'hird design module based	Review of the Onboardir
based on custor priorities.	mer's	on customer's priorities.	Program and confirmation the customer feels empowered to move forwa
- 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. Don't design a set it and forget it program; go back and optimize it based on feedback.

3

**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