Developing a Customer Onboarding Process
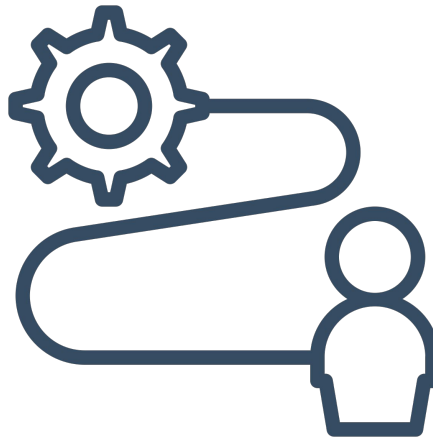
Donna Weber

My experience with Customer Onboarding

What is customer onboarding?

Get customers to use your product

Onboarding is not implementation

The goal is to drive first value

Why does good onboarding matter?

Margin impact
Slow and labor intensive onboarding is costly.
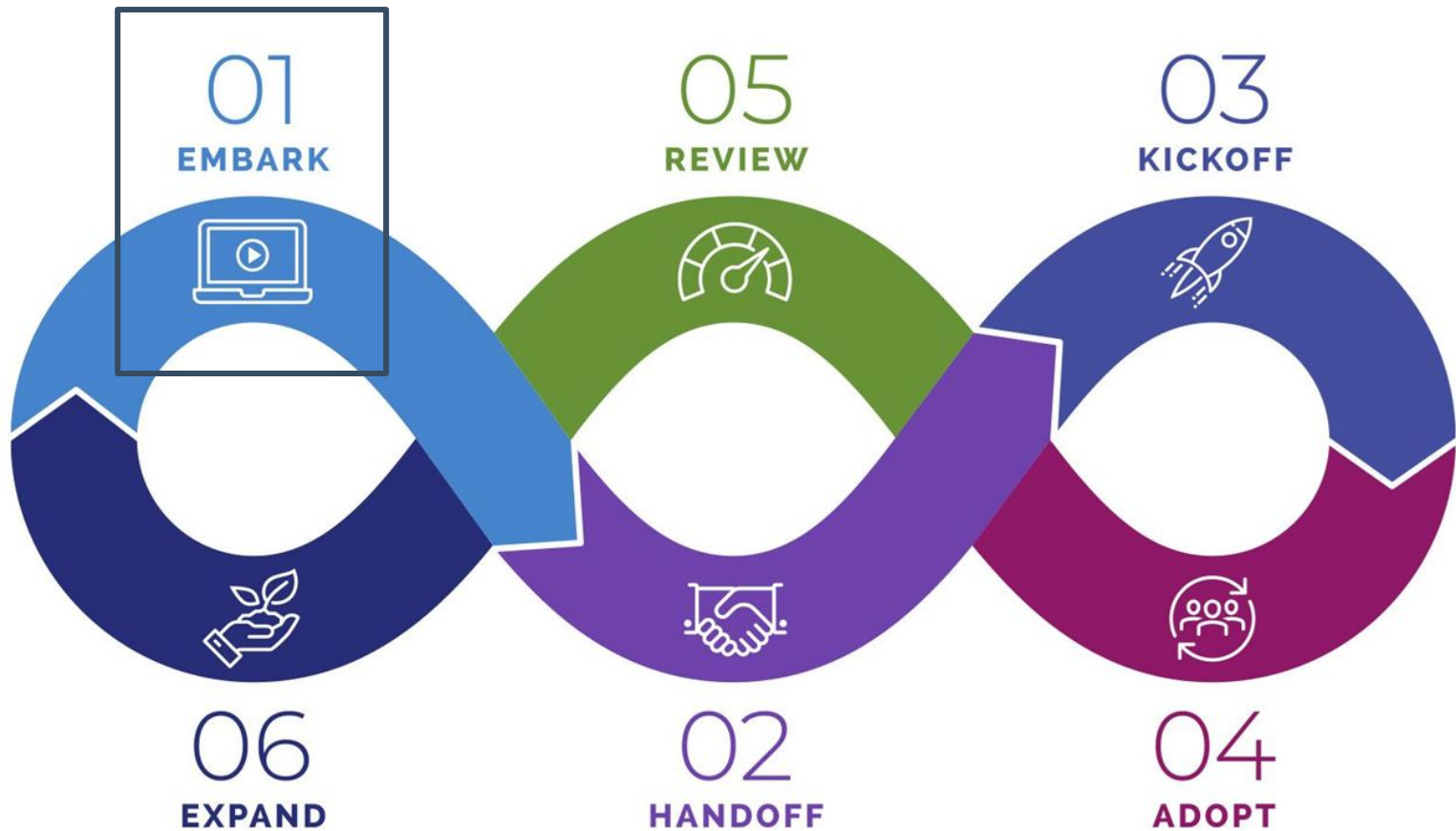But incomplete onboarding costs you too

Avoid a bottleneck
Good onboarding processes make it possible to bring new customers onto the product at greater scale
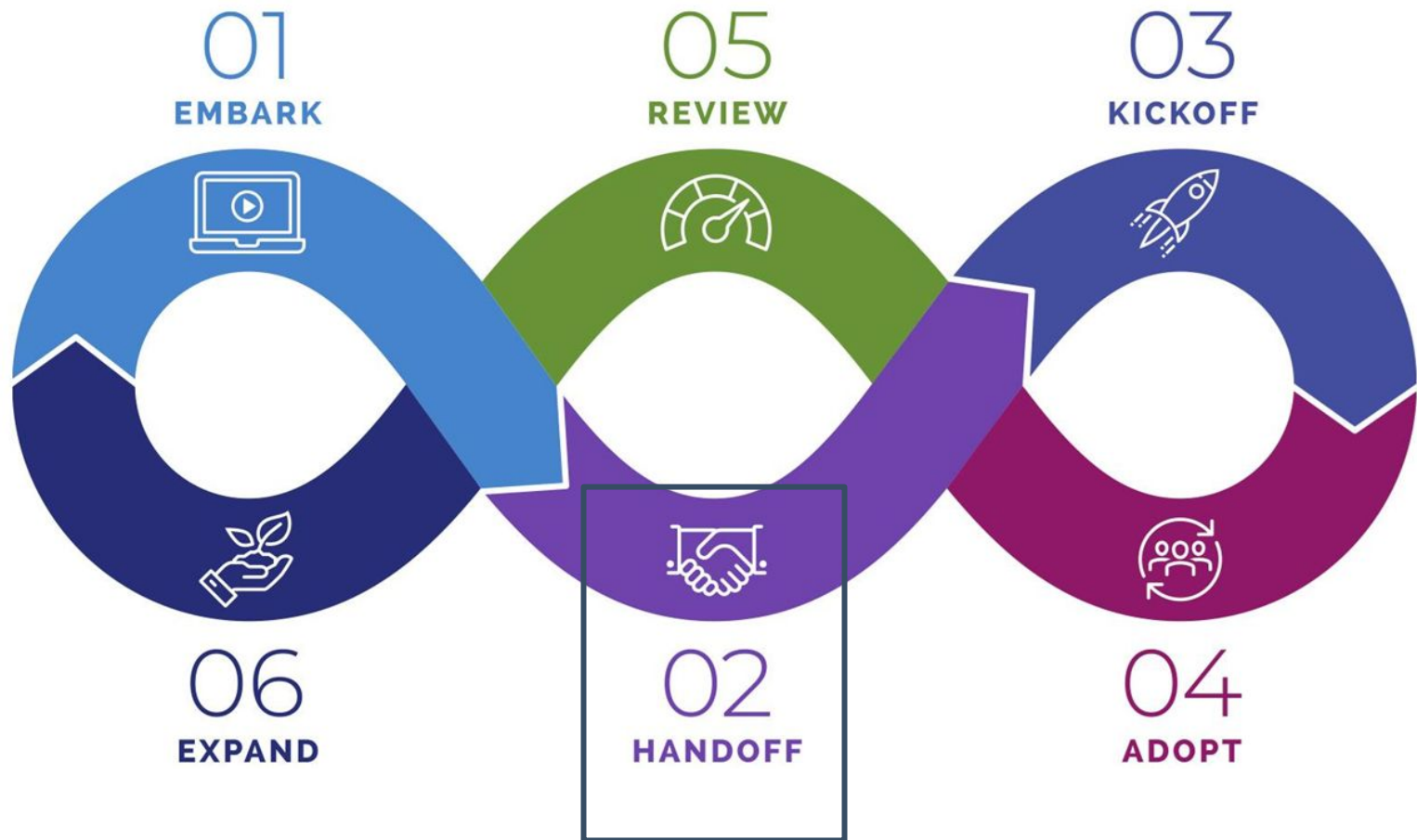
Orchestrated Onboarding™ Framework

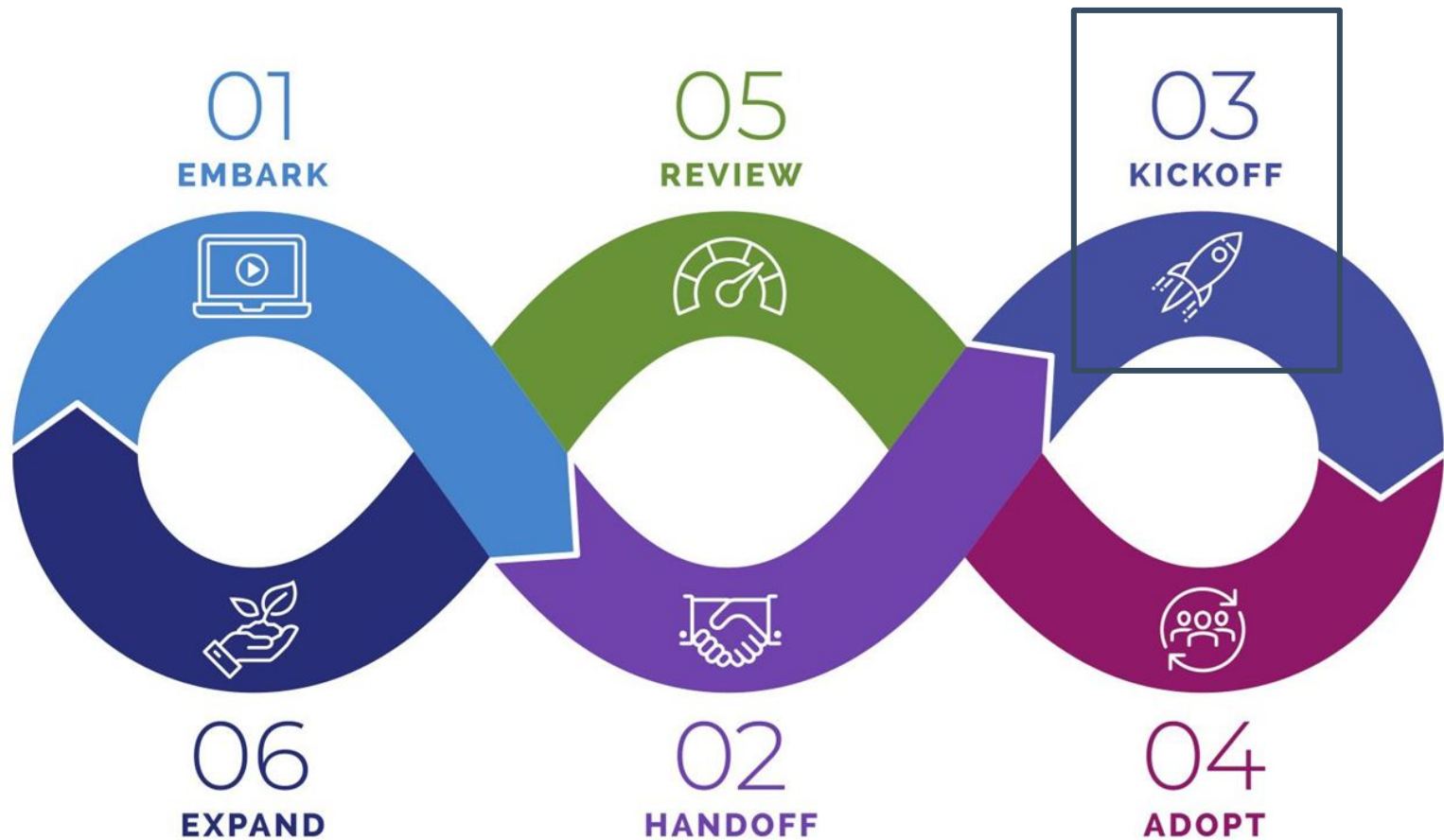**Embark** – In this stage, you sell and market the value of your Customer Success and onboarding programs, even before the deal is closed.

Orchestrated Onboarding™ Framework

Handoff - Next come two handoffs: one for internal teams and another for customers

Orchestrated Onboarding™ Framework

Kickoff - After handoffs, you kick off the implementation and detail all that's needed for your product to go live.

Orchestrated Onboarding™ Framework

01 EMBARK

05 REVIEW

03 KICKOFF

06 EXPAND

02 HANDOFF

04 ADOPT
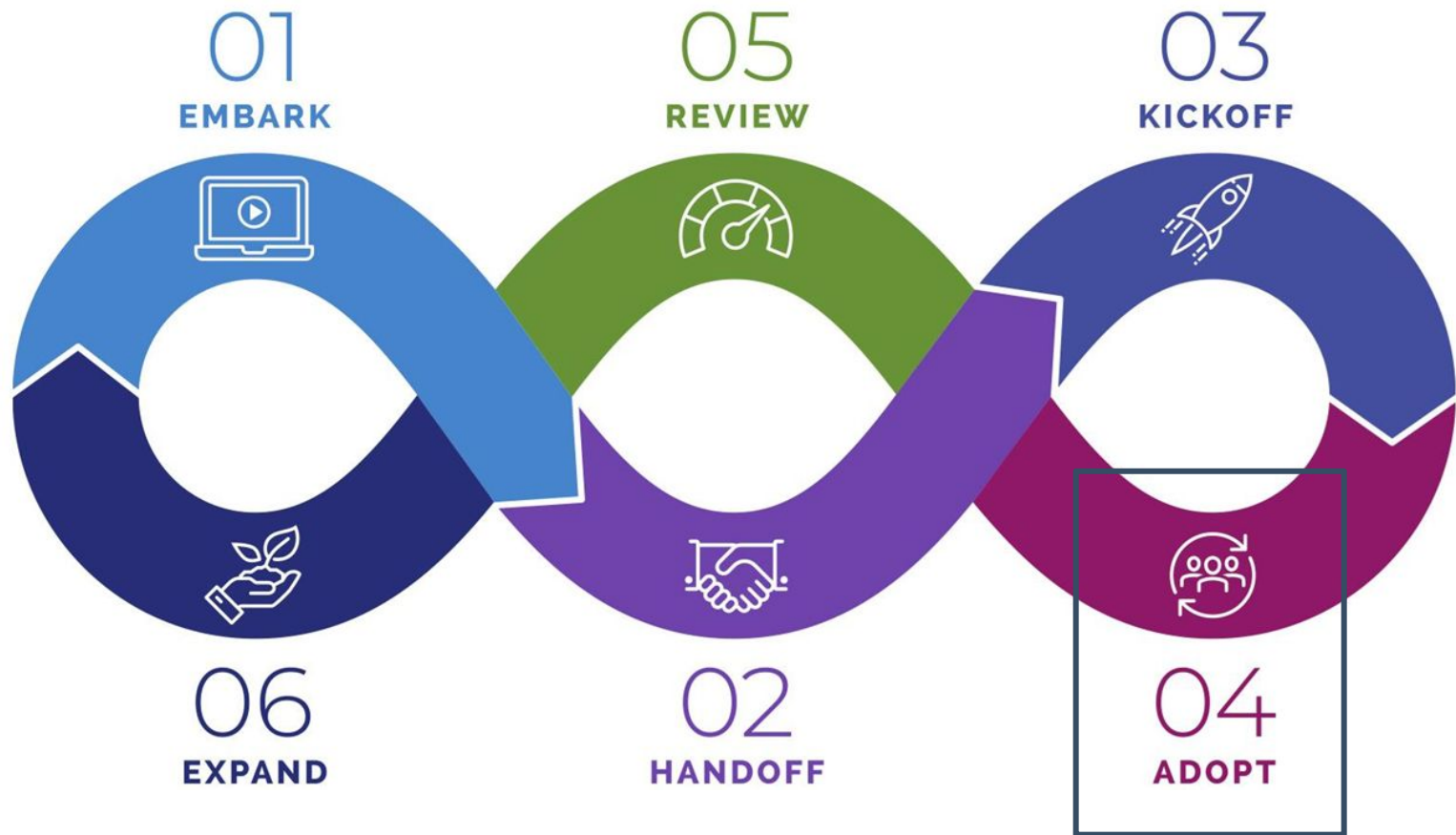
Adopt - This stage includes the actual implementation and adoption of your product and might take several weeks or even months.

Orchestrated Onboarding™ Framework
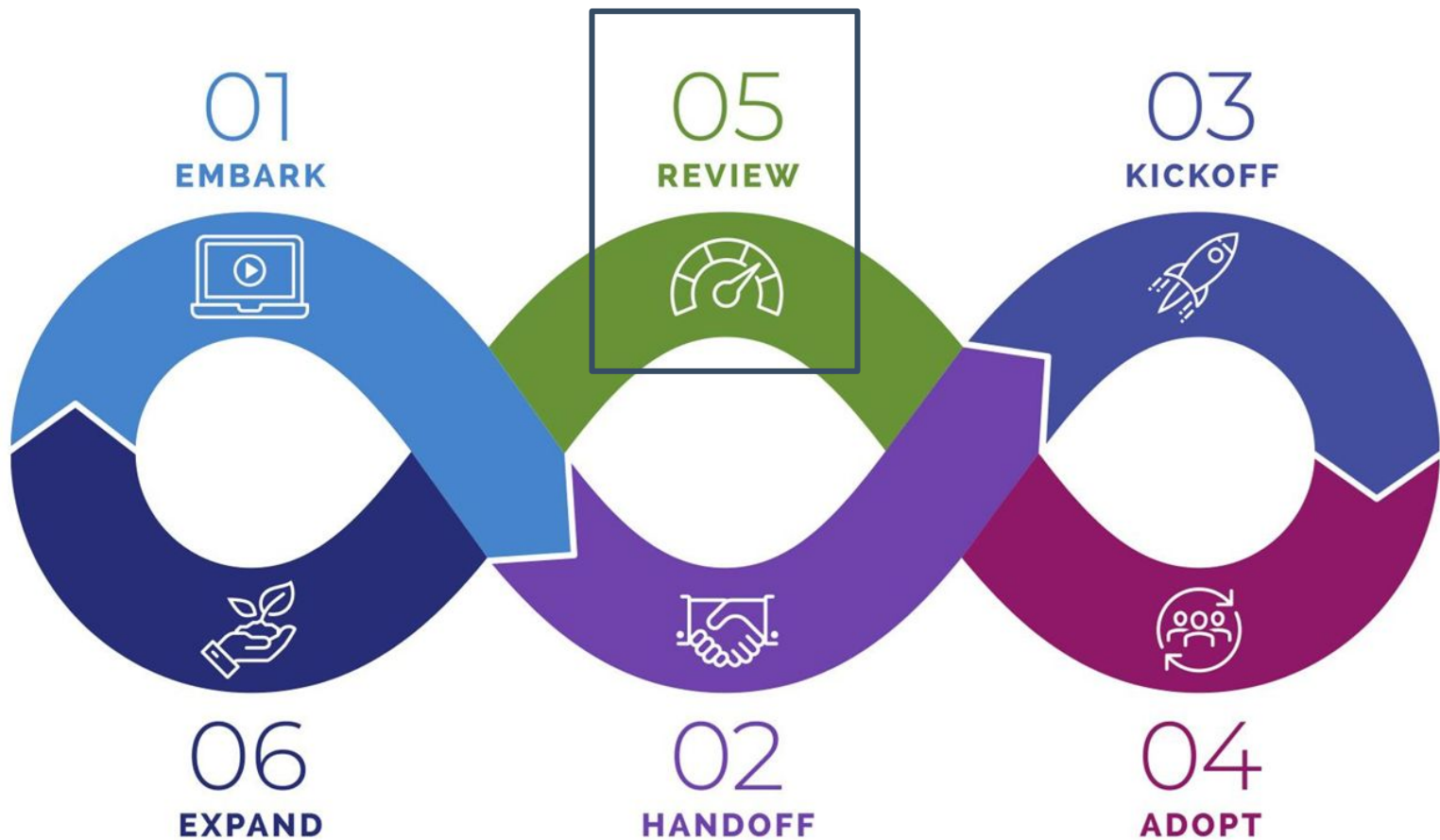
Review - It's important to review progress with your customers as new account onboarding wraps up.

Orchestrated Onboarding™ Framework
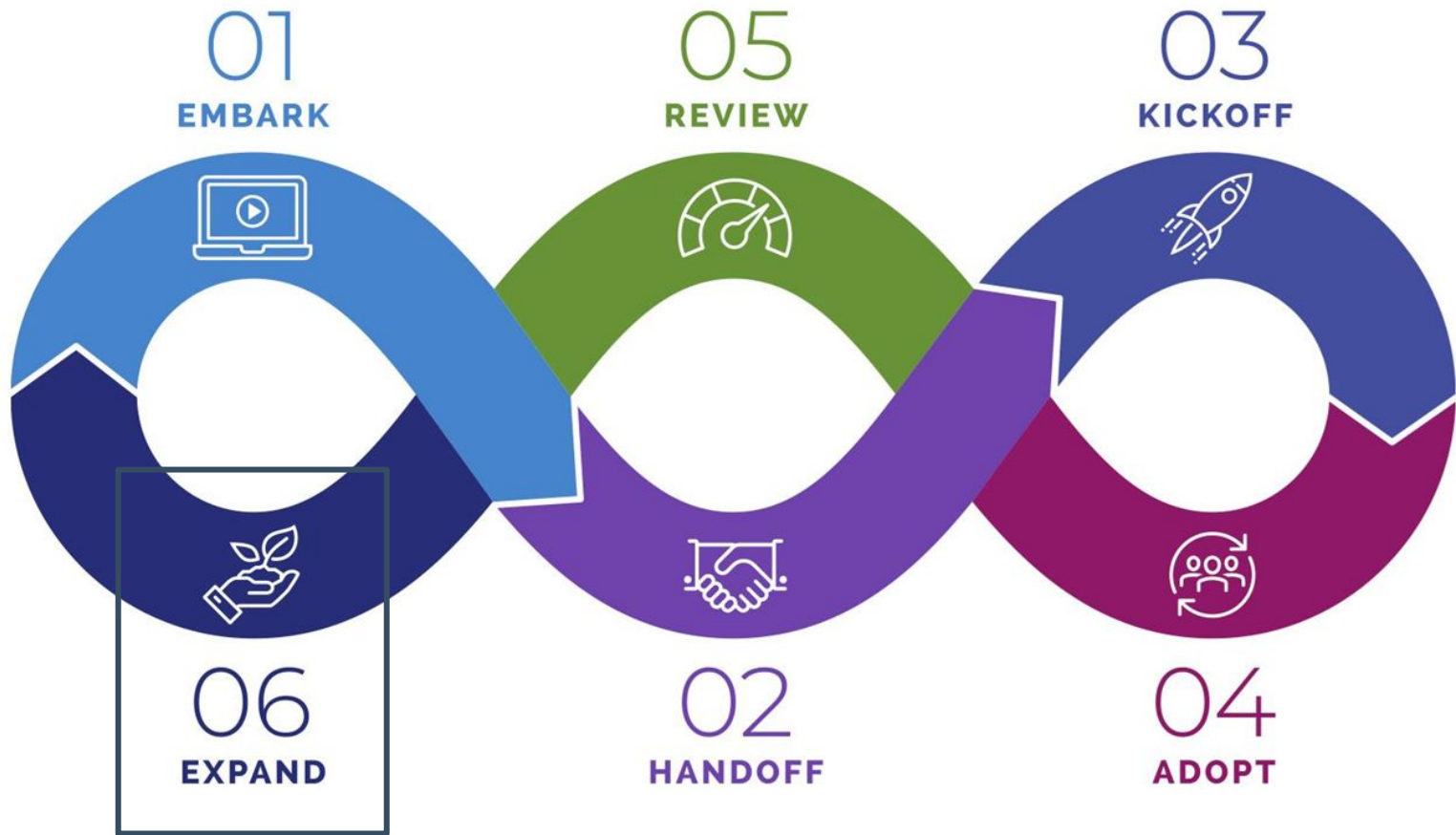
Expand - Keep going because there are always new users and organizations to onboard, and users need to quickly adopt new features and products.

How should you present your onboarding model to customers?

	Acme	Customer	Contractors/ Vendors	SUCCESS!
				Key Success Metrics
DISCOVER Week 1	- Provide onboarding model overview - Align on expectations & goals	- Gain clarity on Acme needs - Identify Customer Stakeholders & teams	*No actions during this phase*	- Capture business goals and outcomes
COLLABORATE Weeks 2 - 4	- Assign Customer facing teams - Prepare for successful launch - Review Onboarding Success Plan - Finalize Contractor/Vendor Letter	- Provide contractor/vendor lists - Attend Stakeholder Meeting - Sign Program Notification Letter - Align contractor communications	*No actions during this phase*	- Signed Contractor/Vendor Program Letter - Signed contract - Build multiple Stakeholder relationships - Signed Success Plan
CONNECT Weeks 5 - 8	- Schedule & conduct Kickoff Meeting - Deploy software - Register / connect contractors - Enable systems & services	- Attend Kickoff Meeting - Project Owner alert teams of programs - Learn & adopt tools	- Establish account - Complete required tasks: Training, MSA, insurance, etc.	- Contractors registered/connected: >60%/target - Users trained
COMPLY Weeks 10 - 12	- Schedule & conduct Review Meeting - Review & update Onboarding Success Plan - Share benchmarks	- Attend Review Meeting - Provide Onboarding & Integration feedback	- Establish account - Complete required tasks - Enroll/complete required training	- Contractors ready to work: >35%/target - Contractors registered/connected: >60%/target
OPTIMIZE After First 90 Days, Ongoing	- Maximize customer value - Assist customer as needed - Conduct regular Review Meetings - Move customer along Acme lifecycle - Update Onboarding Success Plan - Update customer on Training Compliance	- Attend Business Reviews - Share ongoing goals & requirements - Onboard new contractors	- Regularly update account with requested information - Adopt new system requirements	- Achieve discussed business outcomes - Increase adoption of Acme tools - Attend regular Review Meetings

What are the common mistakes to avoid?

Throwing deals over the fence

Jumping straight to kickoff

Trying to do everything *for* the customer

Focusing just on implementing the product

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Throwing deals over the fence	Jumping straight to kickoff	Trying to do everything *for* the customer	Focusing just on implementing the product
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Throwing deals over the fence	Jumping straight to kickoff	Trying to do everything *for* the customer	Focusing just on implementing the product
Start onboarding *before* the deal closes Create a success plan tied to customer goals, and reasons for purchase	Have 2 handoffs Internal handoff to transition from sales to CS Customer handoff to build stakeholder alignment	Drive customer accountability with a roll-out plan	Find immediate ways to show value (within the first 30 days) Onboard users, not just accounts

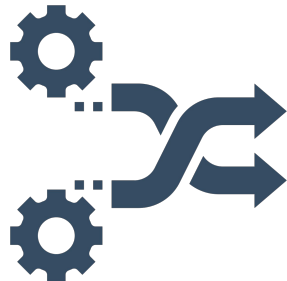# What does the onboarding group look like?

Led By

CSM	or	Onboarding Manager

As you scale, you may add specialist groups

Change Management	Implementation	User Education/ Enablement

How do you balance delivering high value while keeping costs down?

Build role-based learning pathways	Develop a customer maturity model

- Prescriptive, role-based learning pathways enable users to rapidly learn and adopt your product without as much human interaction from the CS team
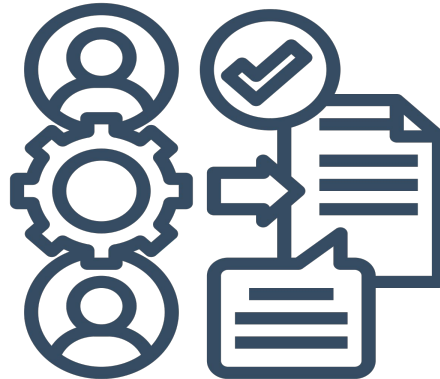
- Don't waste resources throwing everything at your customers at once
- Define a maturity model that guides customers through in a cohesive way

How do you measure onboarding success?

Time to first value

Time or cost to onboard

Product usage/ customer activity

Questions

Lets Connect!

donna@donnaweber.com

@donnaweb

https://www.linkedin.com/in/donnaweb/

DonnaWeber.com