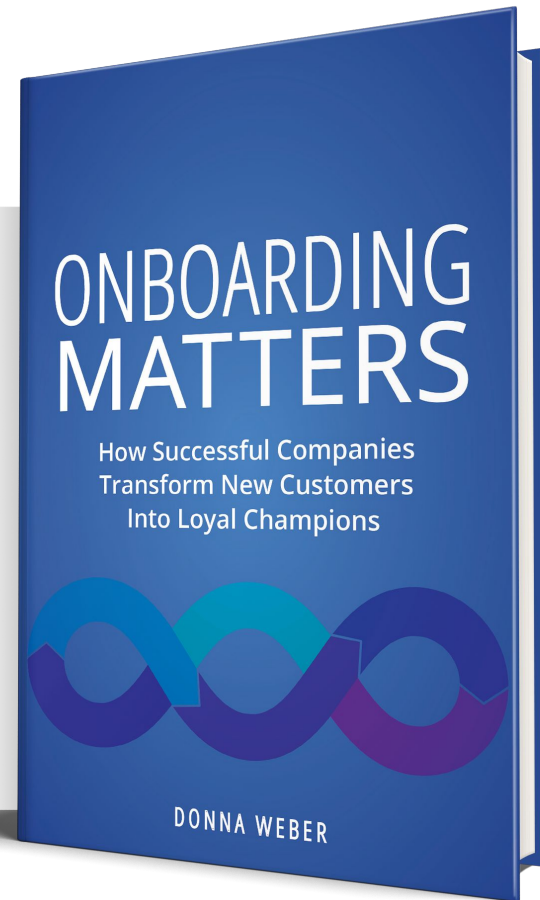# Developing a Customer Onboarding Process
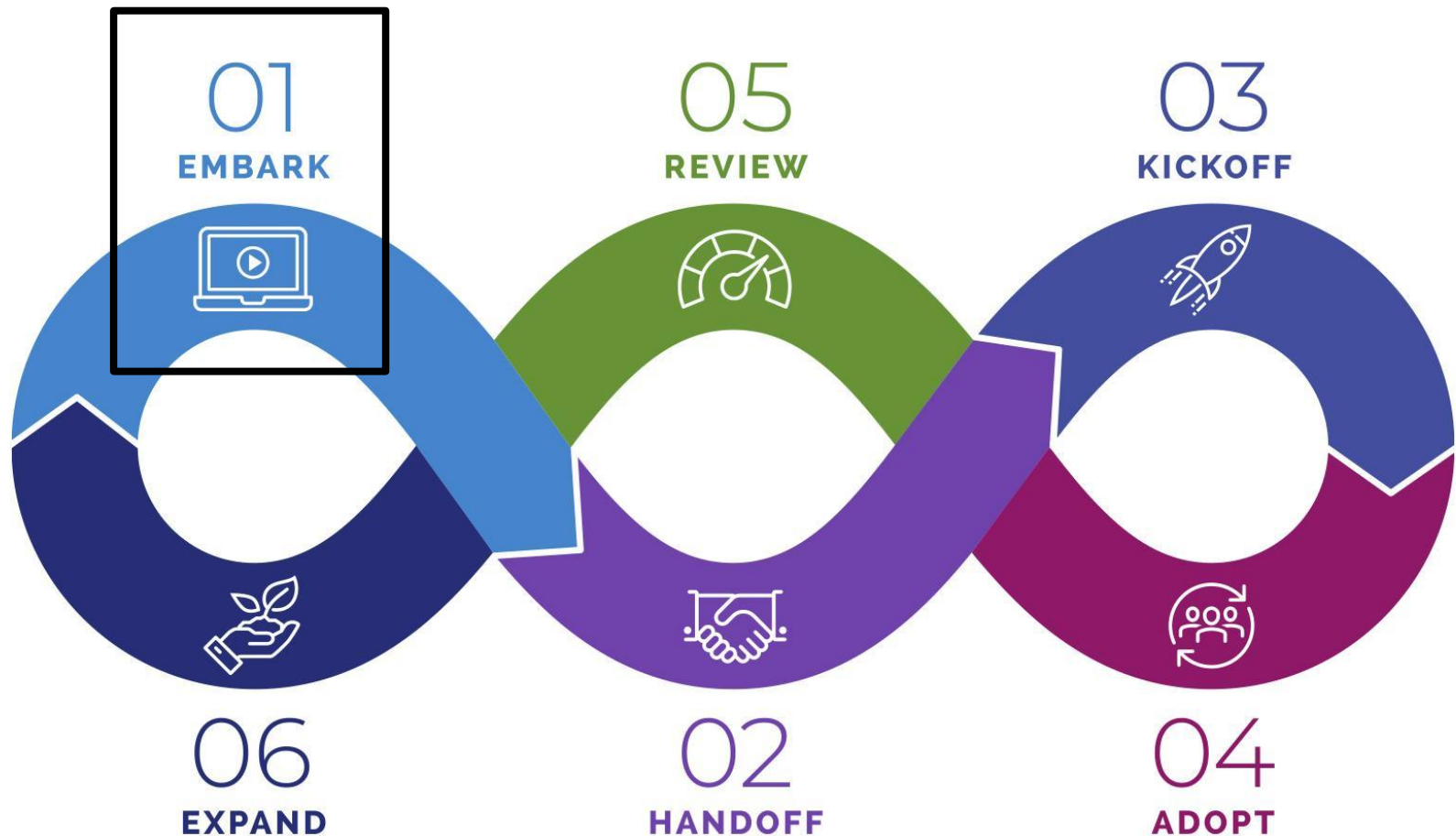
with

Donna Weber
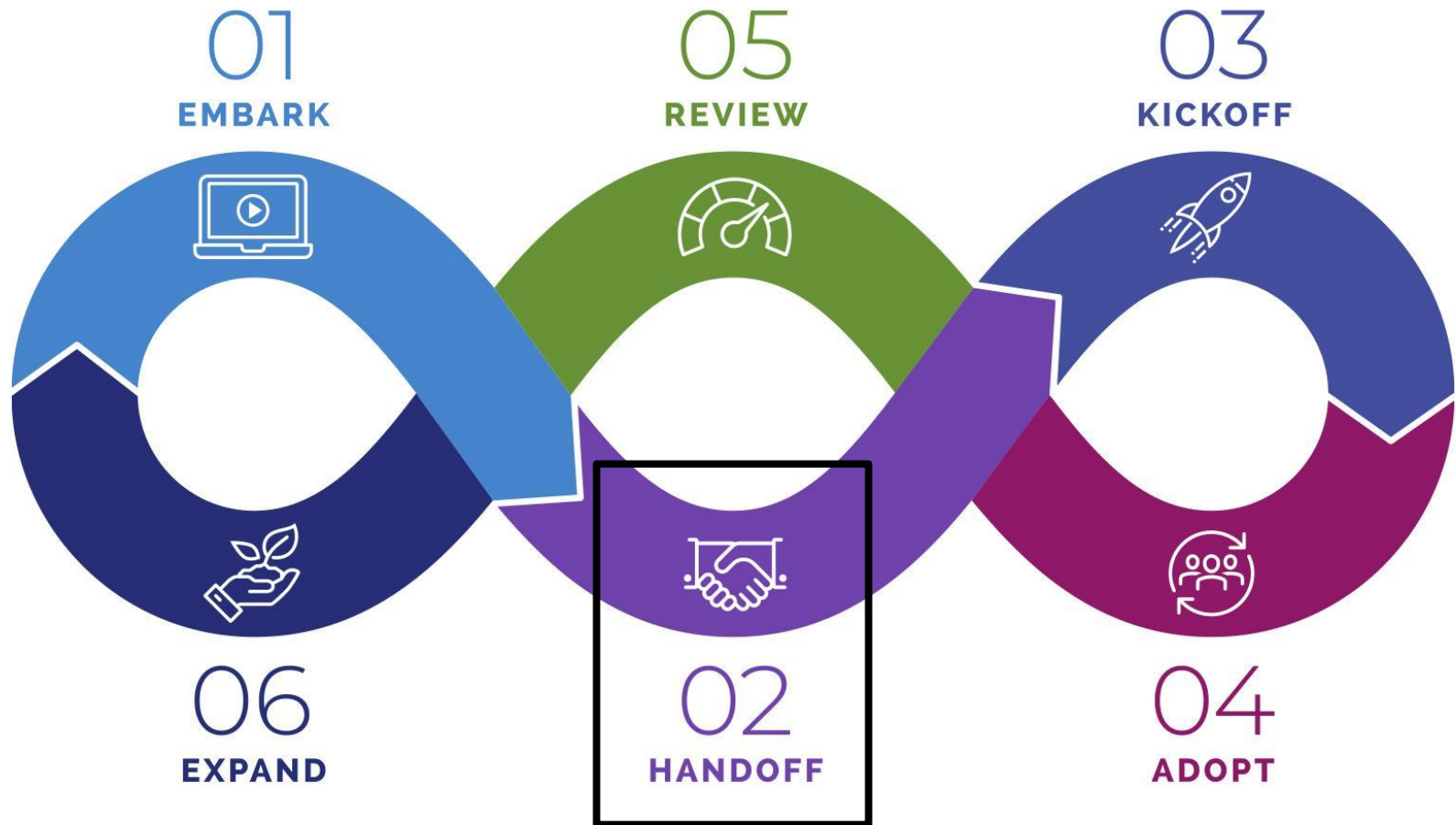
My experience with Customer Onboarding

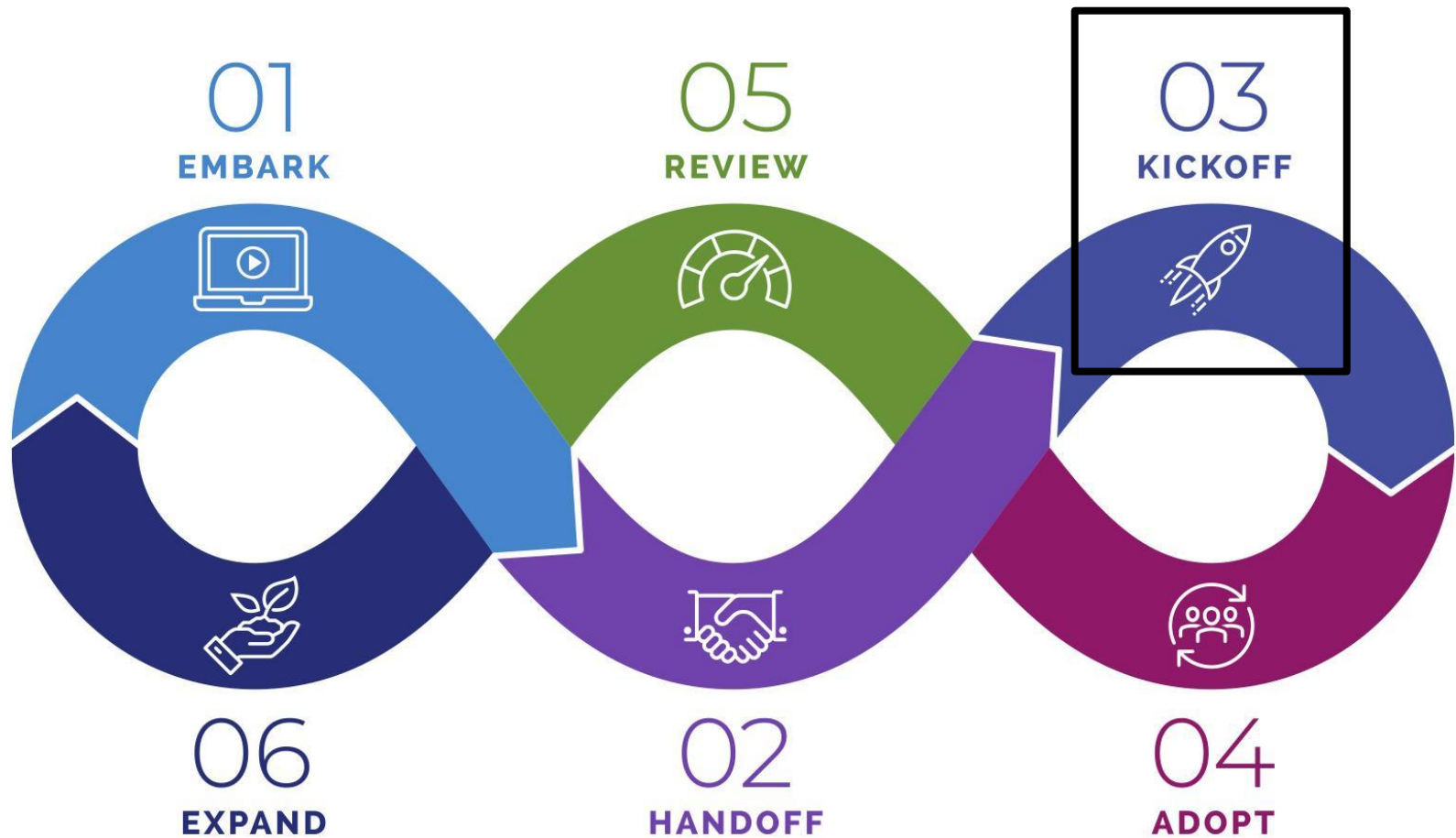# Orchestrated Onboarding™ Framework

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

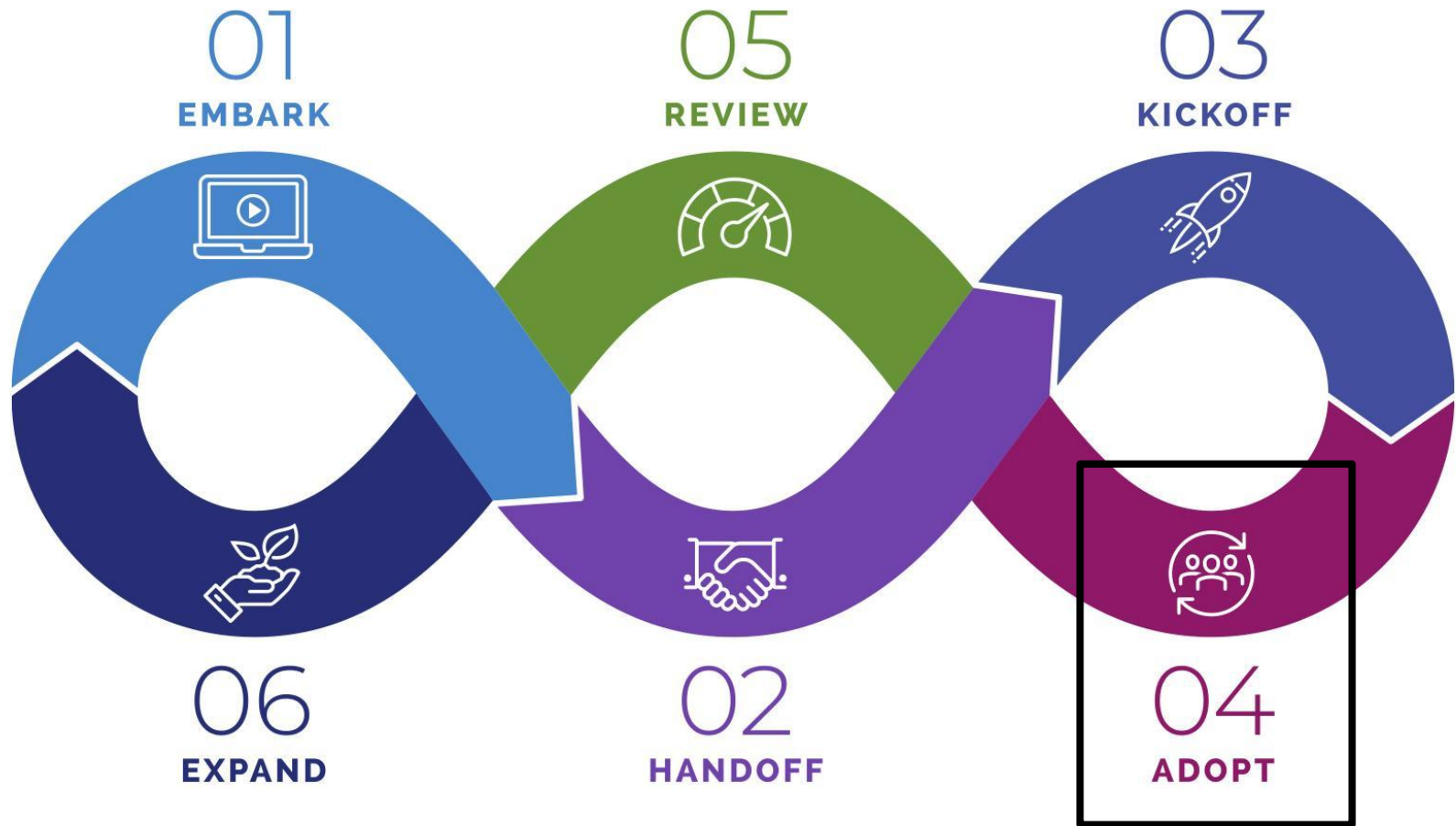**Handoff –** Next come two handoffs: one for internal teams and another for customers.

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
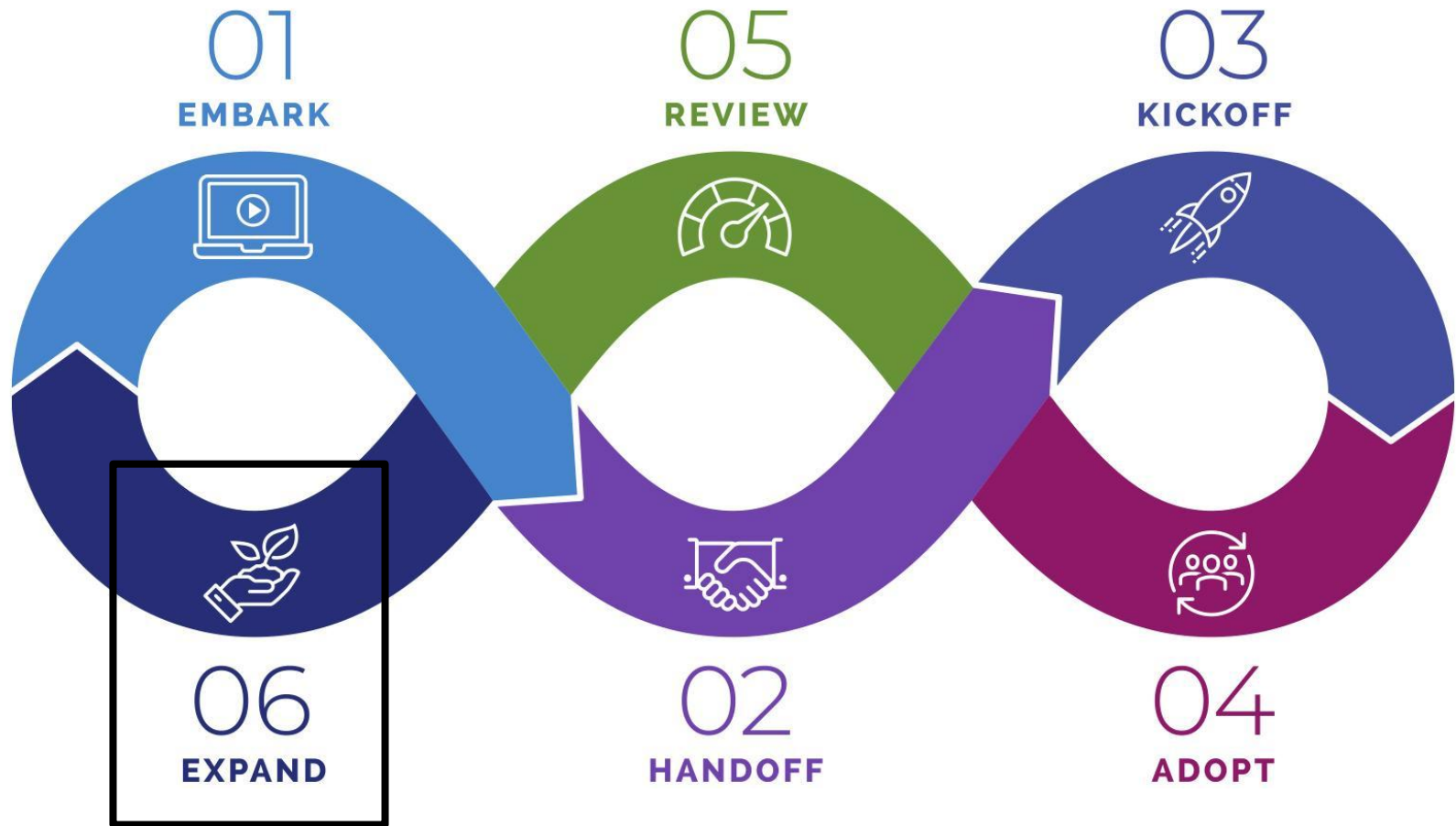
02 HANDOFF

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
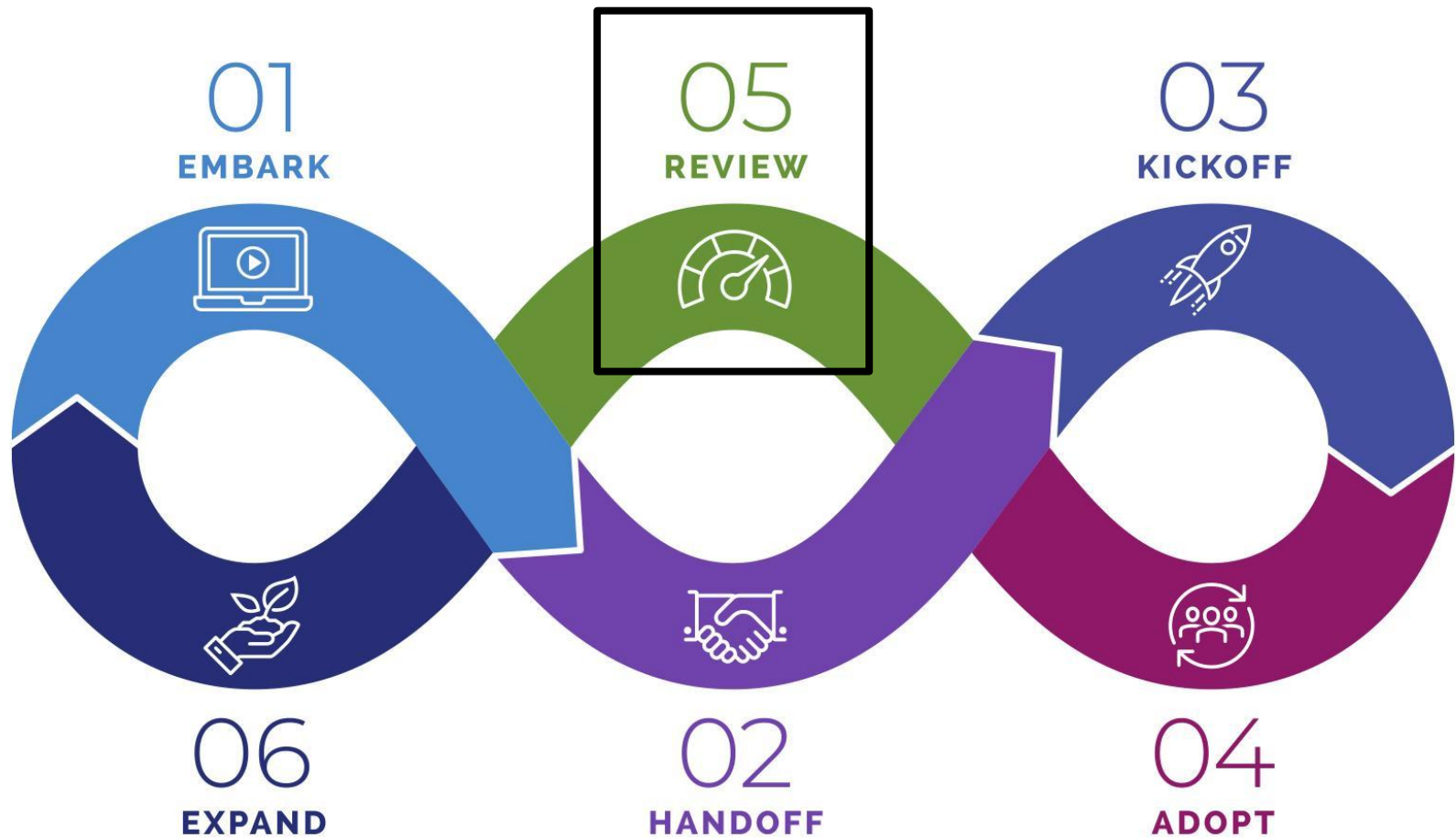
Review – It's important to review progress with your customers as new account onboarding wraps up.

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.

4 of the most common onboarding mistakes

(and how to avoid them)

The mistake: Throwing deals over the fence

The fix: Show a path to success

Early CS involvement
Start onboarding *before* the deal closes

Success plan
Create a success plan, tied to customer goals and reasons for purchase

The mistake: Jumping straight to kickoff

EMBARK ▶ **HANDOFF** ▶ KICKOFF ▶ ADOPT

The fix: Have 2 handoffs (internal + customer)

Internal handoff	Customer handoff
Transition relationship collateral, not just CRM details (what you know about people & personalities)	Build stakeholder alignment with their internal teams; too often something is sold but customers don't actually know about it

The mistake: Trying to do everything *for* the customer

The fix: Keep customers accountable

Clarity	Ownership
Clearly outline timelines, tasks, and milestones	Drive customer accountability for their responsibilities within the roll-out plan

The mistake: Focusing just on implementing the product

The fix: Focus on value

Initial Value	User Onboarding
Find quick wins (within the first 30 days)	Onboard users (don't think only at the account level)

Questions?

Let's Connect!

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