

MAXIO CUTS CUSTOMER ONBOARDING TIME BY SIX WEEKS



Maxio at a Glance:

Founded: 2009

Employees: 300

Industry: Financial

With GUIDEcx: Since November 2018

Maxio's mission is to help B2B SaaS companies unlock their next stage of growth; empowering them to monetize their business and uncover critical financial insights.

30% *decrease in onboarding time*

40% *increase in capacity*

20% *more tasks automated*

GUIDECX DRIVES RESULTS:

Using only spreadsheets to track customer onboarding, Maxio's internal team was having difficulty understanding how long tasks were taking, which tasks were inefficient or needed to be updated, and if the onboarding team was functioning at full capacity. Maxio's customers were struggling to understand where they were in the process and which tasks they were accountable for. Maxio recognized they needed a solution that would provide stronger insights into their onboarding process.

"After talking with the [GUIDECx] sales reps, we immediately knew that this was going to be the solution for us," says Paul Ventresca, director of implementations at Maxio. "They [GUIDECx] have the ability to provide access to our customers. Individual contributors can see the project and the plan. It helps our customers understand what their level of effort is going to be and the timeline of how long the onboarding process is going to take."

"How did we even do this before GUIDECx? We didn't know where the projects were. I didn't have that visibility. Being able to pull that data in [has] made it a lot easier for me. It's made it easier for the implementation team. It's made the customer experience so much better."

- Paul Ventresca
Director of Implementations
Maxio

With the implementation of GUIDECx, Maxio was able to decrease onboarding time significantly, cutting off six weeks to get a customer ramped up and live. In addition to a decrease in onboarding times, Maxio has been able to automate 20% of previously manual tasks. With this automation, customers can begin onboarding even before the initial kick-off call due to increased transparency in task accountability and completion. This increased visibility has helped Maxio improve their customer journey and increase their capacity bandwidth by 46%, allowing them to bring on even more customers.

Ready to Take Client Implementation and Onboarding to the Next Level?

Our platform reduces time to value, creates visibility, and saves time with automation, ensuring project managers and their clients get work done as quickly as possible. To learn more about how GUIDECx can address your business needs, reach out to us and ask for your free **14-day trial** to get started.

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GUIDED PROJECT
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