The Ultimate HealthTech Onboarding Guide

There's nothing like a pandemic to turn the world's attention to the growing importance and dependence on the healthtech industry.

Did you know that for the third quarter of 2021, digital health companies scored $6.7 billion across 169 investment deals? Investors are continuing to bet big on healthcare innovation.

Healthcare companies are now recognizing the value healthtech companies provide, including cost savings and better patient care. However, the onboarding and implementation process can be daunting. It needs to be fast and match the level of digital implementation those clients expect.

Healthtech client onboarding is different from SaaS, Autotech, Fintech, or other industries. Because a person's health and livelihood can be at stake, there's a sense of urgency and anxiety that goes into the onboarding. Doctors need to understand the healthtech platform quickly so they can continue treating patients seamlessly. Healthcare administrators certainly don't take a break in processing documentation and contracts. And patients need to acquire their personal health information as securely and efficiently as possible.

Figuring how to effectively onboard a healthtech software can be tricky. Here's our guide on how to reduce the implementation time while also building a more efficient and engaging healthtech onboarding process.

Why Is Client Onboarding Essential for HealthTech Companies?

Healthtech companies are usually delivering medically and time-sensitive information, services, or products to patients from their healthcare provider. A clean and effective onboarding process will make sure your customers, the healthtech providers, use your platform to its highest abilities. This will help provide value to not only their business, but their patients as well. Client onboarding is not only about improving the lives of your customer, but their customers as well.

When healthtech companies put a focus on client onboarding, they can reduce the implementation time and put their onboarding resources in the right place to make it easier for healthcare providers to deliver value faster.

The Benefits of an Effective HealthTech Onboarding Process:

- **A faster implementation time**
- **Ability to safely maintain medial compliance guidelines**
- **Keep track of important healthcare documents**
- **Making sure your customers' needs are met**
- **And more!**

HealthTech Onboarding Challenges

If you work in healthcare technology, you know implementing and onboarding clients to use your software to it's highest efficiency can sometimes be difficult.

Some of the challenges include:

- **Constant manual reminders to complete onboarding tasks**
- **Keeping healthcare providers engaged through the process**
- **Meetings and more meetings**
- **Long time-to-value (TTV)**
- **Lack of forecasting**
- **Lack of transparency**
- **Scope creep**
- **Poor sales-to-onboarding handoff**

These challenges can increase the onboarding time span and can even make the process more confusing. In turn, this impacts a healthtech company's relationship with their customer.

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3 Ways to Prepare for HealthTech Onboarding Challenges

1) Create a Detailed Onboarding Plan You Can Reuse

Creating a solid onboarding plan requires an investment of time and resources, and that effort shouldn't be wasted. Consider transforming that plan into a template that can be used again and again while also being constantly improved and modified. Here's how you can [track the onboarding process with templates](#).

Make sure to align this schedule so everyone knows the steps to get from A to B. Everyone should know what comes after what and have access to see that process. For example, an Excel sheet, a Google document, or a specific client onboarding software.

We recommend using an implementation software, because not only will you get better visibility into your projects, but you'll have a team that can help you accomplish your goals and use the software to its fullest extent.

FOR EXAMPLE:

Our healthtech customer, [PathologyWatch](#), needed more transparency. With our client onboarding software, the team can check off tasks, see what percentage of each project has been completed, and simultaneously work on assignments and deadlines that previously were much harder to coordinate. While it was once challenging to organize projects with spreadsheets, PathologyWatch can easily place projects on hold and return to them without losing any progress.

Alleva, an electronic medical records (EMR) software, was also using spreadsheets. This can make items difficult to sort through. Medical records are valuable, and misplacing them could mean losing valuable clientele and profits that would be detrimental to any treatment center. So using spreadsheets was not only inefficient, but it was insecure. However, now Alleva is using GUIDEcx and is doing [better than ever](#).

Remember, this onboarding plan should be clearly outlined and adjusted for each healthtech onboarding project. It should offer:

- **Full transparency**
- **Clear timelines**
- **Detailed tasks throughout the process**
- **Scope creep plan**
- **Sales-to-onboarding step(s)**

Detailed Tasks

GUIDEcx CEO and founder Peter Ord outlined how [creating detailed task descriptions](#) when you build an onboarding project template can improve the process.

When you're in a hurry to get the healthtech onboarding process started, it's tempting to rush task descriptions, but take the time to set this up properly. Remember, all future projects that use the template will include your task descriptions and help the customer understand what's next. However, if you need to go back and adjust your template after some experimenting, it's better late than never!

Scope Creep

What is scope creep? According to the [Project Management Institute (PMI)](#), it's "Adding additional features or functions of a new product, requirements, or work that is not authorized (i.e., beyond the agreed-upon scope)."

To avoid the scope creep bullet point above, you can add a note with the task that has a plan for the risk of scope creep. Whether this is setting boundaries or willing to come back to it after the onboarding process, this will help assure the customer their healthtech onboarding is a priority and that this addition could slow down the project.

Sales-to-onboarding handoff

Remember to add a step for the [sales-to-onboarding handoff](#). Speak with your sales team to create a plan to pass along information about your customer. This way, your customer won't have to repeat information they've already given to the sales team. This will help solidify goals, expectations, KPIs and more.

Without this, valuable time is being spent on reiterating information instead of putting a focus on patients. By preventing this loss of information during the handoff process, your customer will have a better, more efficient onboarding experience.

Alleva had us help them build out custom templates, and it helped their healthcare clients feel more secure. Not to mention, putting a template system in place [reduced their implementation time by 68%](#).

The Benefits of an Effective HealthTech Onboarding Process:

- **Reduce time-to-value**
- **Visualizes forecasting**
- **Increase transparency**
- **Reduce risk of scope creep**
- **Improve the sales-to-onboarding handoff**

2) Utilize Automation

Lack of time is one of the biggest challenges in the healthtech industry. On the clinical side, providers need to spend time with patients, and on the administrative side, there is a multitude of time-consuming demands. Automating operational and administrative tasks can deliver a better patient experience, improve the quality of medical service, reduce the risk of noncompliance, and lower costs.

For example, when you get a new customer in your CRM, an onboarding project is created, the customer is invited to the project, and they receive a welcome email giving them all the details.

Automating Client Onboarding Helps:

- **Keep healthcare providers engaged**
- **Reduce meeting times**
- **Reduce time-to-value**
- **Project forecasting**
- **Increase transparency**
- **Reduce risk of scope creep**
- **Reduce constant reminders**

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3) Focus on Constant Communication

Automate Communication

With automation, there's also the option for automating communication. If you use a client onboarding software with simple user interface tools, like email reminders, it allows your customers to take action straight from their email inbox. This simplifies task completion so everyone can see what hasn't been started, what's in progress, and what's been finished. You don't want to require them to remember how to get to your platform, how to log in, and what they should be looking for. This makes it harder to figure out what needs to be done and wastes time.

You can also automate reminders and/or set up weekly emails that tell everyone where the onboarding is at and what needs to be completed for the week.

Setting up systems of regular communication with your new healthtech client will vastly improve the onboarding process.

WITH GUIDEcx, YOU GET A TOOL THAT...

- **Sends automated reports to key team members**
- **Allows you to create tasks for both your internal team and the client**
- **Offers transparency for everyone**
- **Creates real-time projections for onboarding completion based on progress (with our Intelligent Forecasting Algorithm)**

This saves so much time compared to sending manual email updates. The information can be delivered automatically, ensuring all teams clearly understand expectations, tasks, and the next steps in the process.

Keep communication in one place

If you communicate in a single place, you save time making sure everyone's on the same page. [Alleva](#) gained the ability to delegate tasks more efficiently, as well as have every department organized under a single roof. This made for a much more organized foundation for client relationships and allowed them to onboard more quickly and efficiently moving forward.

FOCUSING ON COMMUNICATION HELPS:

- **Keep healthcare providers engaged**
- **Reduce meeting time**
- **Increase transparency**
- **Reduce risk of scope creep**
- **Improve the sales-to-onboarding handoff**

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5 Traits to Look For in HealthTech Onboarding Tools to Achieve Your Goals

When looking for a client onboarding software to up your healthtech implementations, these are the top traits other healthtech companies are looking for:

1) Project and Task Automation

Increase your capacity to manage more implementations by automating manual, repetitive actions like project updates, tasks, and reminders. Use templates to replicate projects and tasks easily.

2) Workflow Management

Quickly identify bottlenecks and continuously improve processes to keep implementations moving and deliver results faster for your healthtech clients and patients.

3) Client Visibility

Build trust with full transparency into project status, next steps, and go-live date. Unified views—through the web portal, via email, or on the mobile app—help keep everyone engaged and accountable.

4) Intelligent Forecasting Algorithm

When you're able to see what projects are behind or ahead, that actually helps you see where your healthtech onboarding revenue stands.

5) Unlimited Guest Invites

Reduce the time between purchase date and project completion by adding all the right people to the project. From clinicians to doctors, everyone should have transparency.

When it comes to healthcare technology onboarding, time and resources are extremely valuable. Patients need to know about their health quickly. Medical records are valuable; misplacing them could mean losing valuable clientele and profits that would be detrimental to any treatment center. That along with the rapid growth healthtech companies are experiencing puts a lot of pressure on their business, delivering value to their customers, and ultimately patients.

With the proper onboarding plan in place and the right tools, you can assure your healthcare customers a safe and efficient implementation.
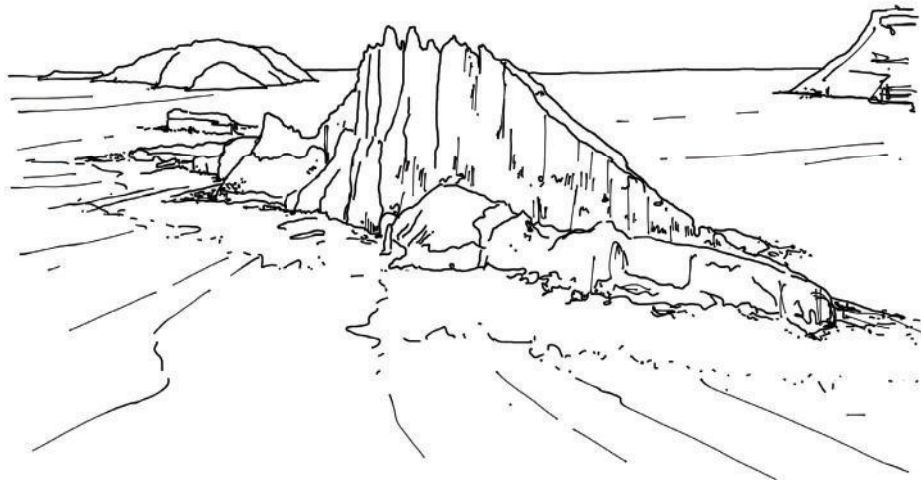
Ready to Take Client Implementation and Onboarding to the Next Level?

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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