14 SIGNS IT'S TIME
FOR A
CUSTOMER ONBOARDING SOLUTION

GUIDECX

We have a few questions for you.

What does your <u>customer onboarding</u> process look like?

How do you take your customers from sales handoff through implementation and training so they can start using your products as soon as possible?

How do you maintain communication with everyone throughout the process so all stakeholders are on the same page?

Are you trying to track every customer's journey with inadequate spreadsheets or overly complicated CRM platforms?


We know how frustrating it is when those answers aren't ideal. That's why we created GUIDEcx: a dedicated solution that's specifically designed for customer onboarding.

No matter what your customer onboarding process looks like now, you can find ways to improve it. That's what we do here at GUIDEcx: help companies increase efficiency, reduce customer churn, and create an exceptional experience for everyone.

GUIDEcx is designed specifically for customer onboarding, which is why it's so effective. Are your customers overwhelmed and confused by complicated processes? <u>We can help</u> Are there internal inefficiencies that are limiting your team's productivity? That's another problem <u>we can solve</u>.

But those are just a couple of issues that an onboarding solution can address. What could GUIDEcx do for your company? This guide will help you find out. Read on to identify all the signs that your company is ready to benefit from a customer onboarding solution.
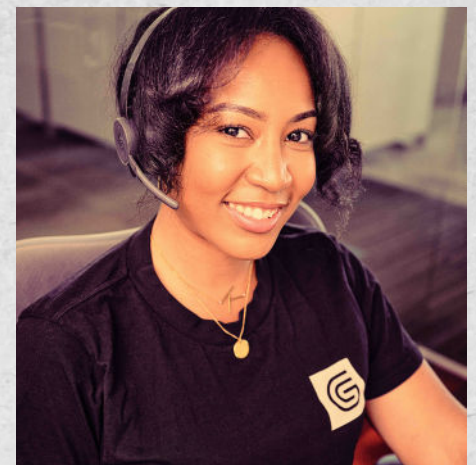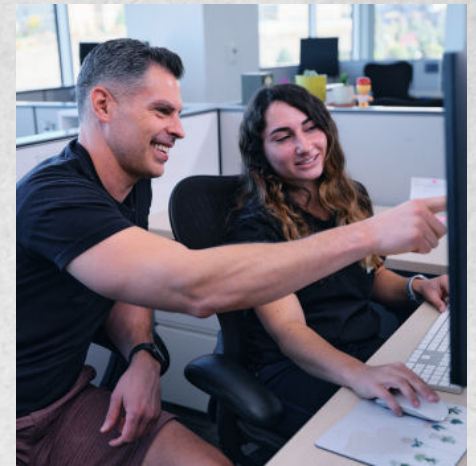
14 SIGNS IT'S TIME

1. You know your onboarding process inside and out

2. Your onboarding process is complex

3. Your onboarding process is standardized and repeatable

4. You want a smoother onboarding process (and so do your clients)

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12. You have time to set up a solution and a team member who can manage the transition

13. You want to improve your ROI

14. Everyone is ready to invest in a solution

Sign #1: You know your onboarding process inside and out

Before you can determine how your organization (and your customers) could benefit from an onboarding solution, you need to have a deep understanding of your existing process from both sides: your team's approach and your customers' experience.

Look at the implementation process from your project manager's perspective:

- ☐ *Were the goals clear?*
- ☐ *Was it easy to assign and manage tasks?*
- ☐ *Did everyone on the team meet their objectives?*
- ☐ *Does your team consistently hit deadlines?*

Now, walk through the steps as if you were a customer:

- ☐ *Can you see all the steps in the process?*
- ☐ *Do you know what your responsibilities are and when they occur in the process?*
- ☐ *Are there consistent roadblocks that slow things down?*
- ☐ *Do you feel confident that you're getting the training and support you need to start using the product?*

There's room for improvement in every onboarding process. Once you've answered these questions, you can determine the best way to enhance yours.

Maybe all your process needs is a few minor optimizations. Or perhaps a complete overhaul is necessary. Either way, GUIDEcx can help. Our experienced guides can show you exactly how our dedicated onboarding solution could help your business.

For more information, schedule a demo with a Guide today.

Sign #2: Your onboarding process is complex

How many steps, people, and dependencies are involved in your onboarding process? The answers can vary greatly depending on your organization's

- ☐ *Size*
- ☐ *Industry*
- ☐ *Customers*

If your process only has a few steps and just needs a small team to manage it, you might not want to invest in a customer onboarding solution.

However, if you have an extremely complex onboarding process that incorporates dozens of steps, nested dependencies, and large teams, an onboarding solution can improve efficiency, support engagement, and reduce delays.

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 **30-day trial** to get started.

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OVER 300,000 GUIDED PROJECT IMPLEMENTATIONS

Sign #3: Your onboarding process is standardized and repeatable

An effective customer onboarding solution incorporates automation and task management tools to improve the process. But these elements are only useful if your onboarding process is standardized and repeatable.

Here are some examples of standardized elements that could benefit from automation:

- ☐ *Sending welcome emails*
- ☐ *Sharing documents and files*
- ☐ *Creating a digital workspace*
- ☐ *Assigning tasks and sending update notifications*
- ☐ *Conducting training walkthroughs*
- ☐ *Sending task reminders*

Automating these processes can save a significant amount of time and money and reduce human errors while increasing productivity. Plus, automation ensures that every customer gets the same experience.

> **If your onboarding process includes many repetitive tasks, it's probably a good time to implement a solution that can automate those steps.**

Sign #4: You want a smoother onboarding process (and so do your clients)

Do you or your team members often think of ways that your onboarding process could be improved? Do clients mention bumps in the road that you wish they didn't feel? Do you have a wishlist of features or improvements such as:

- ☐ *More <u>transparency</u> surrounding task management and progress tracking*
- ☐ *Automated notifications and communications*
- ☐ *Clear task dependencies*
- ☐ *A <u>customer satisfaction tool (CSAT)</u> that gathers useful feedback*
- ☐ *Automatic <u>status change notifications</u> that identify the cause of delays*
- ☐ *Clear, detailed reporting that covers crucial metrics such as revenue and time-tracking*
- ☐ *Gantt chart capabilities*
- ☐ *Customizable templates*

If you and your team can clearly identify the positive benefits of features like these, it's time to invest in a solution that will provide them.

Sign #5: You can't easily track critical metrics

Do you have ways of measuring <u>critical aspects</u> of your onboarding process? Do you have access to data that answers questions like these:

- [ ] *How many of your customers complete the onboarding process?*

- [ ] *How long does it take from start to finish?*

- [ ] *How much revenue are you losing when onboarding is delayed?*

- [ ] *What's your customers' time-to-value?*

- [ ] *Are you seeing consistent <u>churn</u> at certain parts of the process?*

All of these are crucial questions that provide essential insight into your company's potential for long-term success. If you don't have a means of tracking them, you can easily overlook problems in your onboarding process and miss opportunities for improvement. Worse yet, you might lose customers as a result.

A complete onboarding solution that includes automation and reporting features makes tracking these metrics simple and enables your company to make strategic, data-driven decisions.

Sign #6: You need to speed up your time-to-value

An inefficient onboarding process can have a significant impact on your revenue. You can't initiate subscription charges until your customers are fully onboarded. You can't send other invoices until you've started on the work. You may even lose customers who become frustrated by a slow onboarding process that leaves them wondering when they'll see full ROI.

> **"If a client takes two months longer to go live, that's 60 days worth of patients they missed getting quality measures on. This affects their reimbursements from the payers/insurance, and that leaves revenue on the table the longer it takes."**
>
> **– Ann Mooney**
> Former Head of Implementation, Epion Health

Revenue depends on making your customers' time-to-value as short as possible.

TIME TO VALUE = **ONBOARDING START DATE** + **DATE OF ACHIEVED VALUE**

The longer your TTV is, the more likely your customers are to start looking elsewhere. What's the solution? Incorporating a customer onboarding platform that automates your processes, increases efficiency, and improves the customer experience.

Sign #7: Onboarding relies on inefficient manual tasks

Think about the transition from sales handoff to full implementation for your customers. How long does that take? Does it feel quick, or does it drag on for months or even years? Unless that timeline is standard for your industry, chances are that your team and customers feel frustrated.

Inefficient onboarding wastes time and lengthens time-to-value, which can impact customer satisfaction and damage your company's reputation. As such, it's crucial to figure out what's causing the delays and make changes. Here are some questions to ask:

- ☐ *Are you relying on manual practices?*
- ☐ *Are you making do with spreadsheets and project management tools that are functional, but not optimal?*
- ☐ *Are your customers getting confused or missing steps because tasks are falling through the cracks?*
- ☐ *Are tasks delayed due to simple errors in manual communications?*

Once you identify the issues with your onboarding process (and the tools you're using), you can start looking for a solution. GUIDEcx incorporates multiple automations to increase efficiency, reduce errors, and increase productivity.

Find out how Epion Health cut its onboarding time by 60 days with GUIDEcx!

Sign #8: Your customers are disengaged or unhappy

Are your customers frustrated or uninvolved in the onboarding process? That's one of the clearest signs that something needs to change!

How do you know whether your customers are unhappy? Here are some potential indicators:

- [ ] *They're dropping out before underlined_onboarding is completed*
- [ ] *They're complaining via phone or email*
- [ ] *They're leaving bad reviews on social media*
- [ ] *They're providing negative feedback*
- [ ] *They're not responding to your team or completing their tasks*

If your customers are dissatisfied, you need to make changes ASAP! A solution that improves the customer experience can significantly increase retention and brand loyalty.

Sign #9: Your customers embrace new technology

Your team and internal stakeholders aren't the only factors that determine whether your organization is ready to upgrade its onboarding process. Your customers (and your industry) matter too!

If you're providing your customers with software or cutting-edge products, chances are they're digitally savvy and have high expectations for the onboarding experience. If all your team delivers is outdated Excel spreadsheets and infrequent, manual communications, your customers are unlikely to be impressed.

So if your customers are ready for a forward-thinking, technology-driven onboarding process, it's essential to deliver that to them!
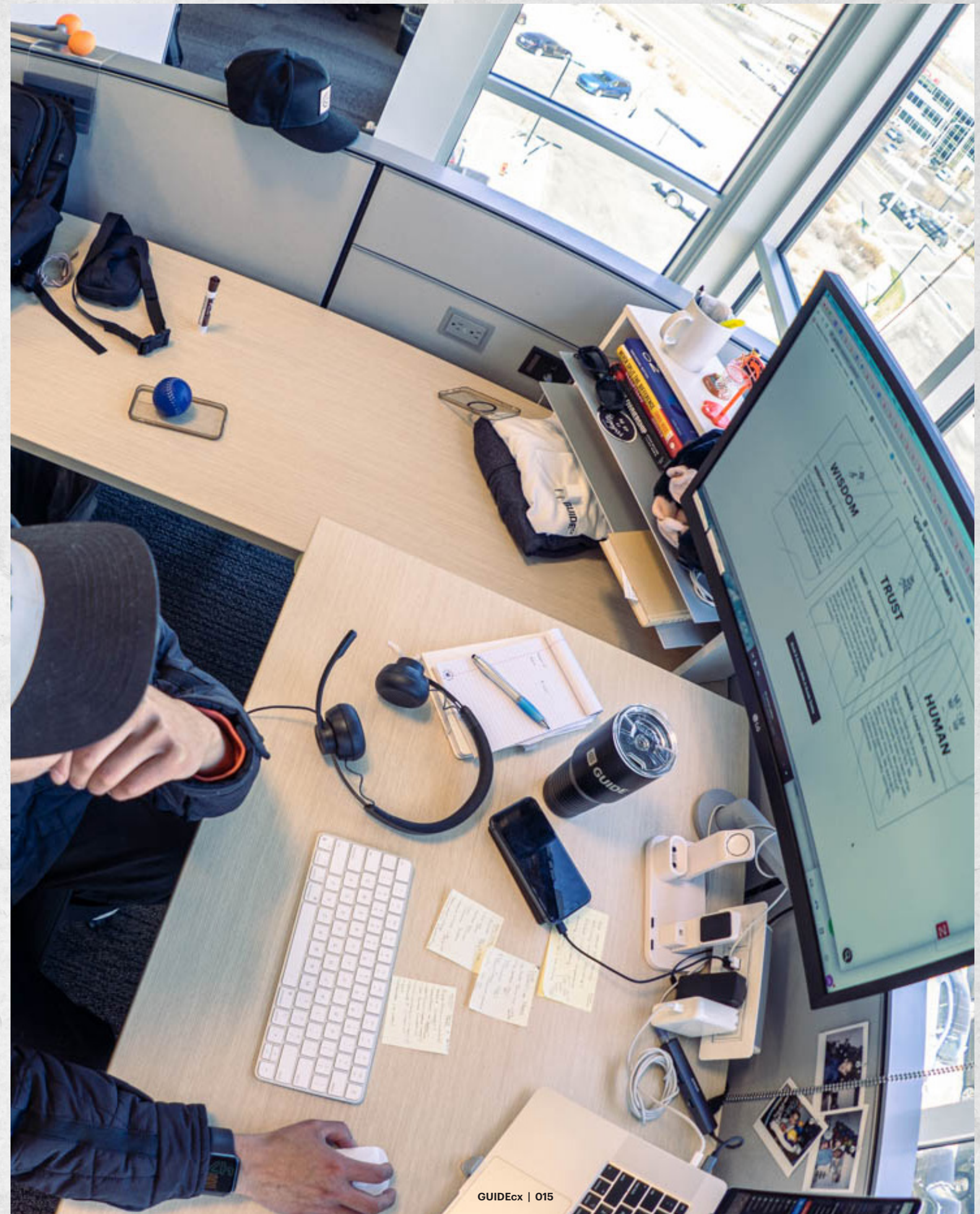
Sign #10: Automation would help you reach your goals

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Could automation allow your organization – and your customers – to reach their goals? Here are some of the benefits automation can provide:

- [ ] *Better customer experience*
- [ ] *Scalable growth*
- [ ] *Shorter TTV*
- [ ] *Increased productivity*
- [ ] *Better Net Revenue Retention (NRR)*
- [ ] *Improved reputation*
- [ ] *Reliable communication*

If those advantages align with your company's mission and your customers' needs, it's time to incorporate a customer onboarding solution.

Sign #11: Your project managers are overwhelmed

While it's crucial to evaluate your onboarding process from your customers' perspective, it's just as vital to consider your team — especially your project managers. If they consistently feel overworked, under-appreciated, or unable to keep up with their workload, you need to make changes.

Oftentimes, it's tedious, repeatable tasks that fill up a project manager's plate and leave them without the time they need to do their jobs. Fortunately, these are the perfect applications for automation! Upgrading to an onboarding solution can immediately reduce your project managers' workload and increase their bandwidth for the critical tasks only they can perform.

Plus, with a streamlined onboarding process, your project managers will have the room they need to onboard new clients, which improves your bottom line.

Find out how implementing GUIDEcx tripled Catchafire's onboarding capacity.

Sign #12: You have time to set up a solution and a team member who can manage the transition

Incorporating an onboarding solution can significantly cut your team's workload and increase capacity. But you'll still need to dedicate some extra time to implement the new system.

Do you currently have the capacity to set up a new onboarding platform and train your team to use it? And do you have someone who can oversee the implementation and ensure a smooth transition? If so, now is the right time to get started!

Consider these abilities when evaluating your team members to choose a transition manager:

- [ ] *Bridging the gap between the sales and customer services teams*
- [ ] *Communicating clearly*
- [ ] *Understanding what the customers want*
- [ ] *Identifying what project managers and team members need*
- [ ] *Feeling comfortable with automation*
- [ ] *Being willing to make changes*

Make sure you have someone who's fully onboard and ready to champion the new platform.

Sign #13: You want to improve your ROI

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Are you actively looking for ways to reduce operational costs and increase revenue? Improving onboarding efficiency can do that. With a dedicated customer onboarding solution, you can

- *Increase scalability*
- *Reduce onboarding times*
- *Streamline your processes*
- *Incorporate automation*
- *Gather critical data*
- *Increase internal capacity*

A dedicated onboarding solution offers an exceptional ROI. Take Kount, for example. Before integrating our platform, the average time it took for Kount to integrate customers was between 90 and 120 days. Implementing GUIDEcx cut that time down by over 43 percent!

Furthermore, our platform simplified and standardized internal processes, which significantly decreased the training time for new Kount employees. Prior to the GUIDEcx integration, it took between four and six months to fully train an implementation manager. Now, new employees are ready to handle their own onboarding cases within 60 days.

Find out more about how we helped Kount increase capacity by over 40 percent!

Sign #14: Everyone is ready to invest in a solution

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Finally, consider your company at large.

- *Do you have buy-in from key stakeholders?*
- *Are you frequently hearing about onboarding issues from team members and leadership?*
- *Can most of your people see the value of investing in an onboarding solution?*
- *Do your customers consistently offer negative feedback about the onboarding process?*

If you can answer "yes" to most of these questions, then it's time to move forward. When everyone is invested, it's the perfect time to incorporate a solution that will drastically improve the customer onboarding experience for everyone!

Upgrade your customer onboarding experience with GUIDEcx

Onboarding is your first chance to make a good impression on your customers. And GUIDEcx can help you do just that! Our platform helps you reduce TTV, increase transparency, and save time and money via automation. Give your team members and customers the tools they need to get things done quickly and efficiently.

What kind of results can you expect? GUIDEcx has helped customers:

- ☐ *Reduce onboarding time by an average of **14 days***
- ☐ *Increase project manager efficiency by up to **60 percent***
- ☐ *Shorten time-to-value by **25 percent***
- ☐ *Improve customer experience by **doubling interactions** during onboarding*

To learn more about how GUIDEcx can take your organization to the next level, book a demo today!

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