

# **17 QUESTIONS FOR EVALUATING AND SELECTING THE RIGHT PLATFORM FOR CUSTOMER ONBOARDING**

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Getting your product into the hands of those who need it is only half the battle. For your customers to truly get the value out of the product or service you offer, they need **a process that gets them up and running** in the system as quickly as possible in the most effective and intuitive way possible.

Part of the retention phase of the customer journey, customer onboarding is the term used to describe the process of walking a customer through each step for implementing the service they have purchased. Once the customer has purchased your service or product, onboarding is the step-by-step process you will take them through as they begin implementing each feature of the service, until their first use, and then the support you provide afterwards. This helps the customer understand the breadth and depth of the product that you offer, making sure you set them up for success right out of the gate with a supportive and positive customer experience.

Before 2017, customer onboarding solutions did not exist. Enter GUIDEcX founder and CEO Peter Ord, who, from his personal struggles to find a solution to onboarding customers, went on to create the first customer onboarding software of its kind, thereby creating the category that exists today. Going far beyond basic project management tools and manual task management, customer onboarding solutions are SaaS tools that can help you **do more with less** by automating your system, streamlining tasks, creating automated communications, and defining task dependencies specific to onboarding your customers. More robust than systems that merely track timelines, customer onboarding platforms are built so you and your customers can work together toward a successful implementation in a unified platform with full transparency throughout the entire project.

The right onboarding solution can greatly improve the customer experience, improve time to value, and deliver a strong ROI. As you and your organization determine if you're ready for an onboarding solution, you'll need to do your research to understand what solutions exist, how they work, and which system is the right one for your goals. This may take some time, with some consumers spending an average of **79 days** gathering information before making a major purchase.

Much like buying a home or a new car, evaluating onboarding solutions requires understanding your needs, asking the right questions, and working with the right team to find the solution that works best for you.



## 17 QUESTIONS YOU SHOULD ASK to Evaluate Customer Onboarding Solutions

Before anyone buys a new home or a new car, they read reviews, talk to friends, and ask questions using specific criteria to help them narrow down their choice.

You can do the same when choosing an onboarding solution by reading **client reviews** on industry-specific sites such as G2, asking peers on LinkedIn, chatting in organizational forums, or speaking directly with the company you are considering.

Here are 17 questions you should ask to help you evaluate and differentiate between the options you're considering:



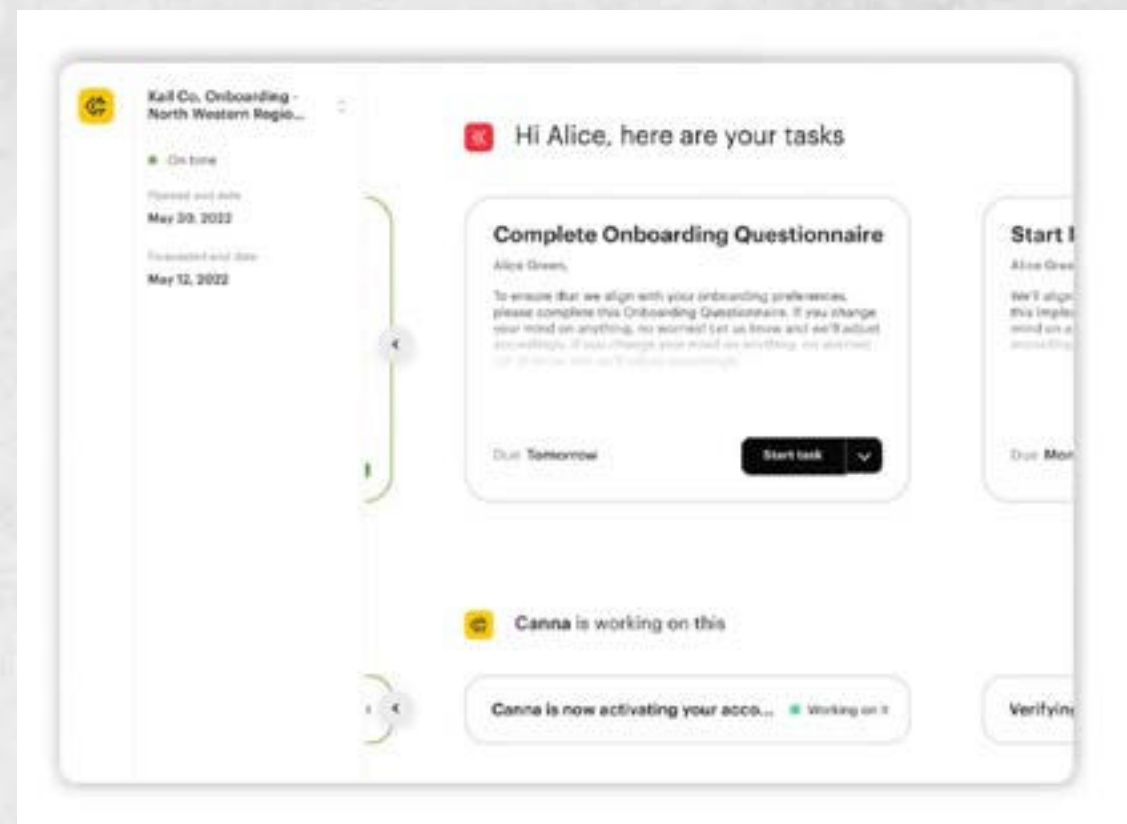
# #1: Does this platform offer standardized processes and tasks?

For the best experience, the solution you choose should be one that understands onboarding and has a standardized list of processes and tasks upon which your organization can build. A solution that builds from proven processes and tasks they've standardized will help you streamline your current processes more easily. It will identify steps that can be eliminated or connected, ensuring the most efficient onboarding experience for your customers. If they've worked with a variety of verticals, SMBs, and enterprise-level organizations, they'll understand your specific needs more quickly and be able to ask the right questions to get you up and running more quickly.

In 2020, **Groupize** experienced a dramatic uptick in growth that left the company searching for repeatable implementation and onboarding processes for its clients. With the standardization GUIDEx provided, Groupize is seeing time savings that equate to 10 days a month due to the system's automated features.

# #2: Does this solution offer a clear way to communicate with internal and external stakeholders?

If communication isn't being tracked in one unified location, key information may not be shared with team members who are tracking progress, customers who have questions, and stakeholders who want answers. Being able to communicate with customers and team members within the project helps keep valuable information in one location, keeping communication flowing between all parties. The right solution will include built-in communication that allows full transparency and triggers automated and collaborative @mention communication even when you're not logged into the system, keeping everyone on track and on the same page.



**“Our implementation average has shot through the roof, and we’re saving time. I really couldn’t do my job without [GUIDEx].”**

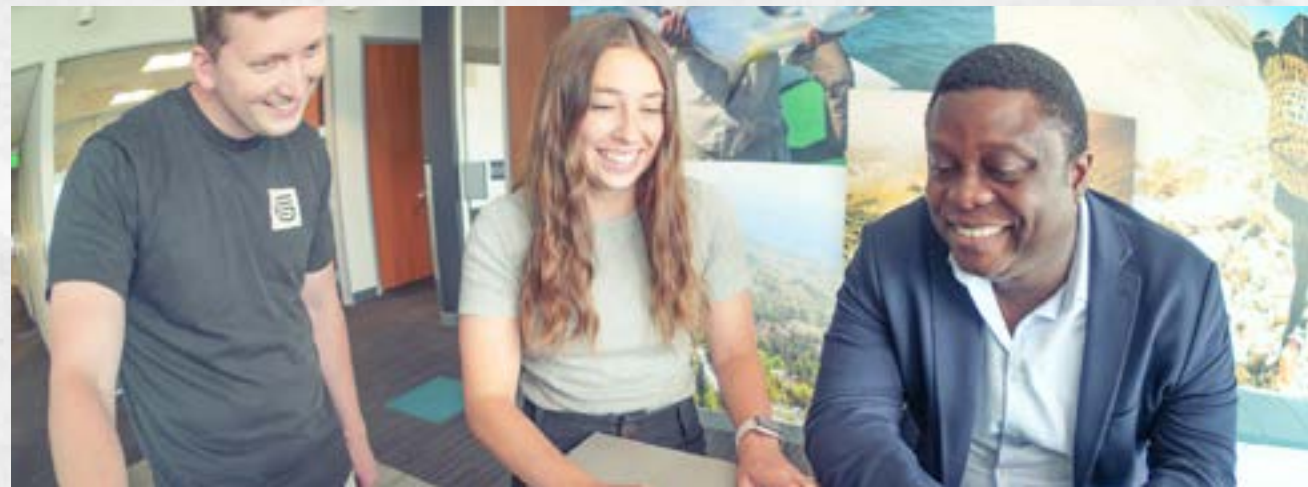
– **Justin Peticolas**  
Manager of Implementation and Onboarding  
Groupize

### **#3: Does this option include a clear view of different stages of the project's progress?**



With true transparency into the progress of the project, you can assign or move resources to where they're needed most. Based upon this high level of visibility, your teams will be able to identify changes in the timeline, roadblocks, and other issues that need to be addressed. This capability is a necessity for managing resources and increasing capacity and efficiency for your business. Without it, your team and your customer are left wondering what is next, how close they are to completing onboarding, and if there are any hiccups holding them back. A transparent system reduces friction caused by project blindness.

With a clientele located across the globe, **EventBooking** needed a system that would help it organize big projects and increase transparency between its clients and internal team. With the overview of projects that GUIDEcx provided, large groups of people can now work together on each project, and everyone is on the same page in terms of deadlines and responsibilities. This boost in visibility allows both sides of the partnership to stay up to date on changing deadlines.



### **#4: Will I need additional staff, or can I expand our capacity to onboard more customers with even fewer staff?**



If your team members currently feel bogged down with an overwhelming amount of tasks that are difficult to track and manage, they need a platform that makes things easier for them. The right solution should eliminate extra tasks, streamlining the process through digitization and automation, thus easing the burden on your implementation team. With a clear roadmap defined and automated within the onboarding system, your staff will be freed from busywork and confusing implementation tasks, allowing them to take on additional duties or onboard new clients, thereby increasing your ROI. The system you choose should expand capacity, not squeeze what you currently have.

After implementing GUIDEcx, **Kount** was able to achieve an increase in capacity of 40 percent, with project managers now handling 17-20 implementations over their past capacity of 10-12. Not only has Kount made significant improvements to its processes, but GUIDEcx has also given it what it needs to continuously adapt and grow.

***"A lot of tools have internal-facing project management for onboarding, but it's not a customer partnership. It's different with GUIDEcx."***

**– Brooke Cantwell**  
Customer Experience, Kount



## #5: How quickly can my customers get to value, or will this process drag on endlessly?



A cumbersome system with clunky processes can drag out implementation. Customer engagement begins to drop off the longer onboarding takes. This means the time to value drags on as well. The best platform will be efficient, streamlined, and intuitive, allowing your customers to complete the onboarding process faster and helping them get to value as quickly as possible. As you do your research on various platform options, ask current customers for TTV (time to value) metrics they achieved with the platform that will help you define which system is providing the fastest way to value. You'll want to understand what mechanisms are instilled within the process to help drive that TTV for your customers. These differentiators are what make the right solution stand out.

**G&A Partners'** clients were overwhelmed with tasks they needed to complete—without the accountability of due dates and clear expectations. GUIDEcx offered a simpler way to improve their process templates and tasks as well as speed up the entire implementation process. Now, instead of long email chains, clients have access to a platform where all tasks are organized and templates intuitively explain the exact process, enabling them to learn on their own. This streamlined process has decreased onboarding time by 25 percent, with clients now getting to value in as quickly as four weeks.

***"The whole GUIDEcx team is friendly and quick to respond. They are quick and eager to help, and the support they offer is great."***

**– Dominic Ireland**  
Onboarding Team Lead, G&A Partners

## #6: Will I see a decrease in customer churn and an increase in customer renewals because of an improved customer experience?

The customer experience is the **number one reason** people work with an organization. If the platform you're considering can't deliver the best experience possible, it isn't the right choice. The best customer experience includes one that is pain-free, feels seamless, helps them achieve their goals, and gets them to value quickly, all while being guided by the most experienced team possible.

One way to measure the "happiness level" of current customers is to research the NPS (net promoter score) of the organization or check to see if there are **CSAT (customer satisfaction) tools** that are currently measuring the level of satisfaction customers are experiencing with the software. These are key indicators that will tell you if what the company promises to deliver is what its customers are getting. If the software you're considering has happy customers, your own customers will likely be happy as well, thus leading to a decrease in customer churn and an increase in renewals for your organization.



## Sign #7: How easy is the system to use?

A customer shouldn't have to wait for your team members to explain each step in the process. While some steps may require additional training, the more intuitive your system, the more engaged your customer will be. An intuitive platform is easier for the customer to use, helping ease frustrations from previously complicated processes or steps. Empower them with an intuitive process that allows them to move from one step to the next as seamlessly as possible with automated triggers that open up the next task when one task is completed. With this kind of intuitiveness, project managers become guides rather than hand-holders.



Due to the intuitive nature of GUIDEcX, **Epion** has been able to eliminate an initial client kick-off call with clients, instead spending that time completing assigned onboarding responsibilities on their own. Epion team members can now easily track the customer's progress and pinpoint roadblocks using the GUIDEcX "self-motivating" time-tracking feature.

**"GUIDEcX is a game changer as far as project management goes. It "destroys timelines" by eliminating redundancy, delivering consistency, and creating expectations for the team and the client."**

– **Ann Mooney**  
Former Head of Implementation, Epion Health

## #8: Will I see an increase in engagement due to automated communication and digitized processes?

Engagement occurs when customers and team members understand their responsibilities and know each step of the process. To increase accountability, the right system will include the ability to assign tasks to specific individuals. This high level of transparency allows project managers to have a clear picture of how the project is progressing. On top of the ability to assign specific tasks, the system should include automated communication triggers that let customers know when a task is complete and then start the next step in the process. This keeps customers moving through the process and keeps project managers updated on deadlines, hiccups, and achievements.

With this level of accountability and automation, there is ownership on all levels, and connectivity is increased. How important is customer engagement to project timelines? GUIDEcx sees an average of **90 percent on-time delivery rate** when five or more users are invited to the project. The more people who are engaged in the project and understand their level of responsibility, the more buy-in you achieve, and the higher number of customers completing onboarding. That's a win for both you and your customers!

**90%** on time delivery rate  
when 5+ users invited

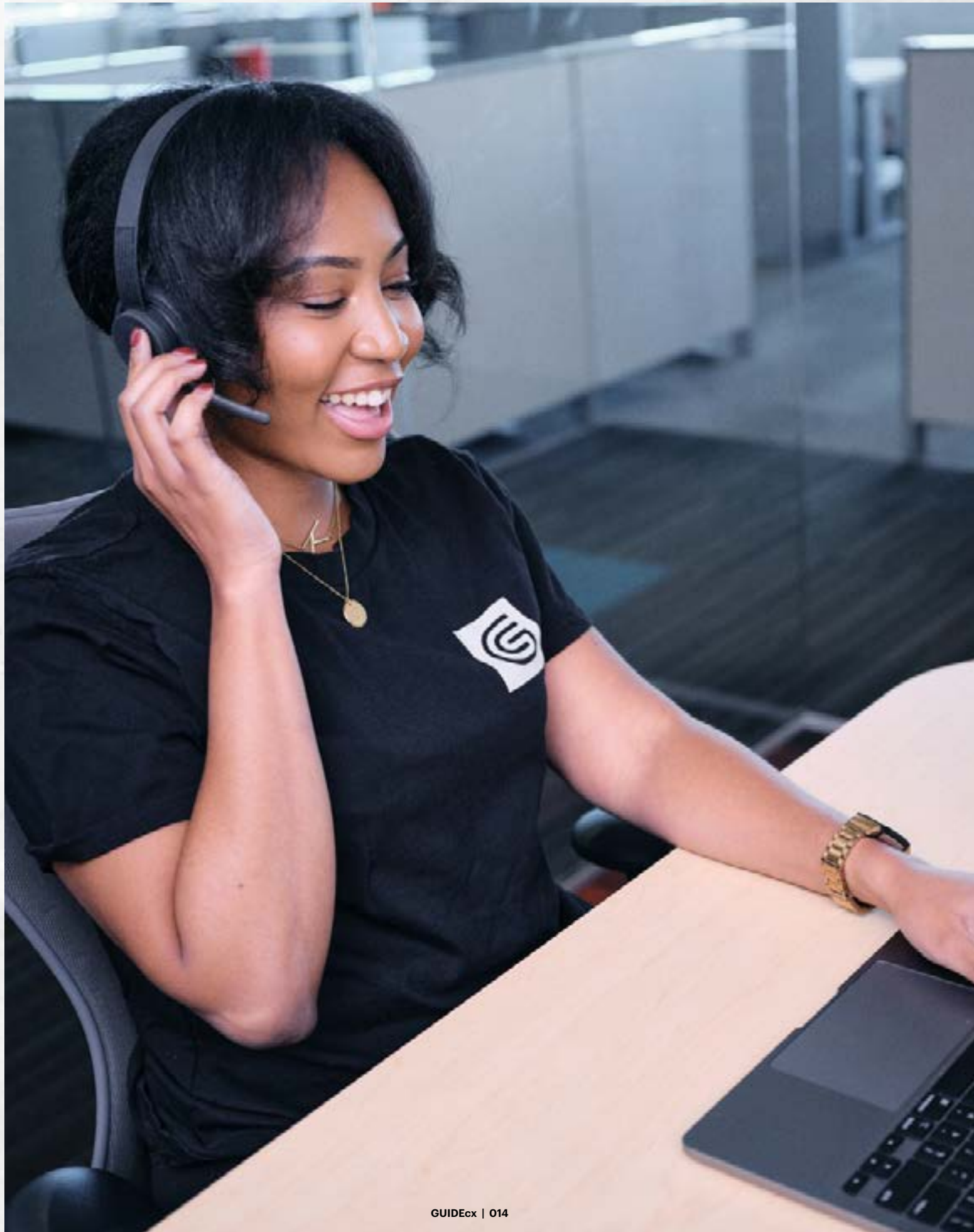
Due to its smooth implementation with GUIDEcx, Epion's client engagement on the platform often begins before the very first client call, helping clients and Epion team members stay on track for deadline completion. This accelerates time to value for the client and Epion itself, including alleviating staff burden.

*"GUIDEcx is where the work happens. Without GUIDEcx, I would have never been able to keep track of anything at all."*

**-Ann Mooney**

Former Head of Implementation, Epion Health





## #9: How scalable is this solution?



The best option for onboarding will include the ability to scale at the level with which your organization feels comfortable. If you can start with a basic but robust system and then scale to include more options, you can achieve the best of both worlds. Questions you might ask when speaking with a rep might include the following:

- **Have you worked with companies in the past that needed to scale?**
- **What aspects or elements of your solutions help companies scale?**

Use testimonials, or ask for references from companies they've helped scale. If they've worked with an organization similar in size or needs to yours, they will be better suited to help you scale as well.

**Catchafire** recognized its manual processes were not optimized for growth. Since the implementation of GUIDEcx, Catchafire has seen a 2-3X increase in its capacity to onboard clients and an increase in its operational efficiency.

***"When we were thinking about what the future looked like for Catchafire, it really became clear that there was a lot of opportunity to create efficiencies and optimize our onboarding processes. . . . [GUIDEcx] gives us an understanding of how we can continue to build upon and optimize what we are already doing as we continue to grow."***

**– Emma Schragger**  
Senior Manager of Implementation and Program Operations, Catchafire



## #10: Does this solution offer customizable templates to fit our business model and branding?



You likely have several templates or checklists your team is using for your current onboarding strategies. Your solution should include the ability to build these templates within the system with all the same branding your team and customers have come to expect. This keeps your process on brand and allows you to further control and customize the customer experience.

With the implementation of GUIDEcx, **AgriSync** has been able to reassess its processes and create tailored templates for each customer. GUIDEcx's custom templates have streamlined the client onboarding process by providing the exact capabilities each partner needs. Now, every AgriSync client can go through onboarding more autonomously while still receiving the white-glove service they expect.

## #11: How robust is the reporting for analytics within the onboarding platform?



No system should exclude the ability to analyze data collected from onboarding. Look for tools such as a CSAT (customer satisfaction) tool and dashboards to track revenue, project completion, average time to completion, and how you're achieving revenue directly related to onboarding. These are powerful methods to understand how well the system and your process are performing.

As you do your homework, ask to see a sample of a report. Ask what metrics are being measured within those reports. Do those metrics match up with the KPIs (key performance indicators) you're aiming for? Be sure to ask if there is additional support or guidance they can provide to help you analyze the results of your reports. Customer success staff or support should be available in case you have a question or concern, providing guidance on how to interpret the data and suggesting course corrections if needed.

**"Everything is so much easier with GUIDEcx. Originally, it was hard to get in the swing of the different scenarios we had to support with our customers. Now, we have GUIDEcx to work with us on anything we need support with, whether it's branding or creating a wonderful customer experience."**

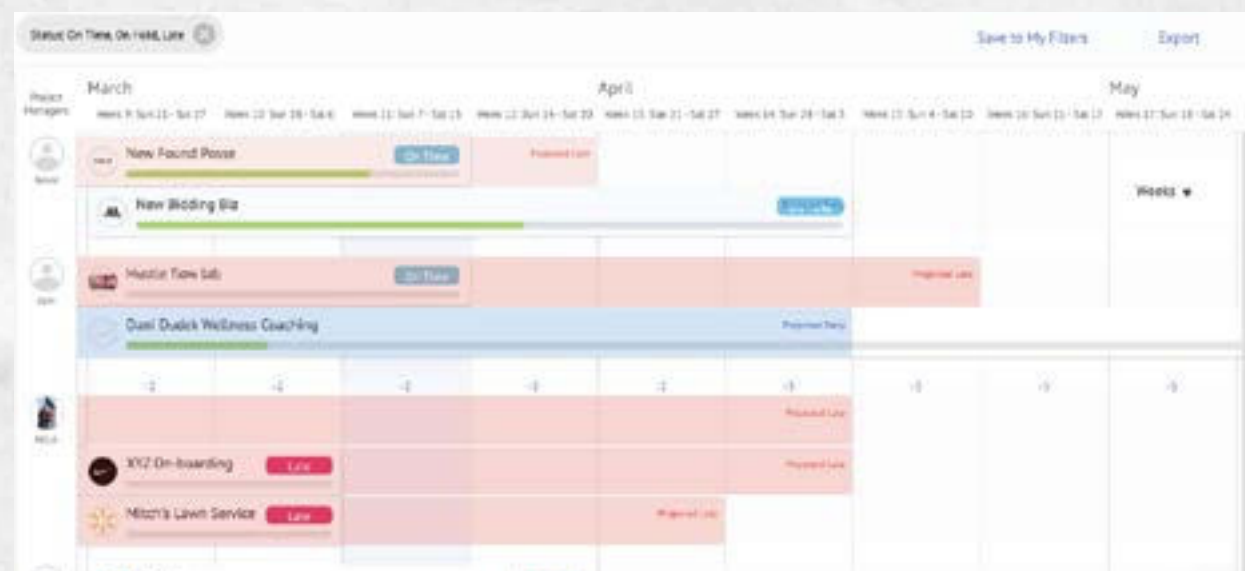
– Cheri Klussendorf  
AgriSync



## #12: Does the platform include real-time forecasting, allowing me to manage and mitigate risks on the project?

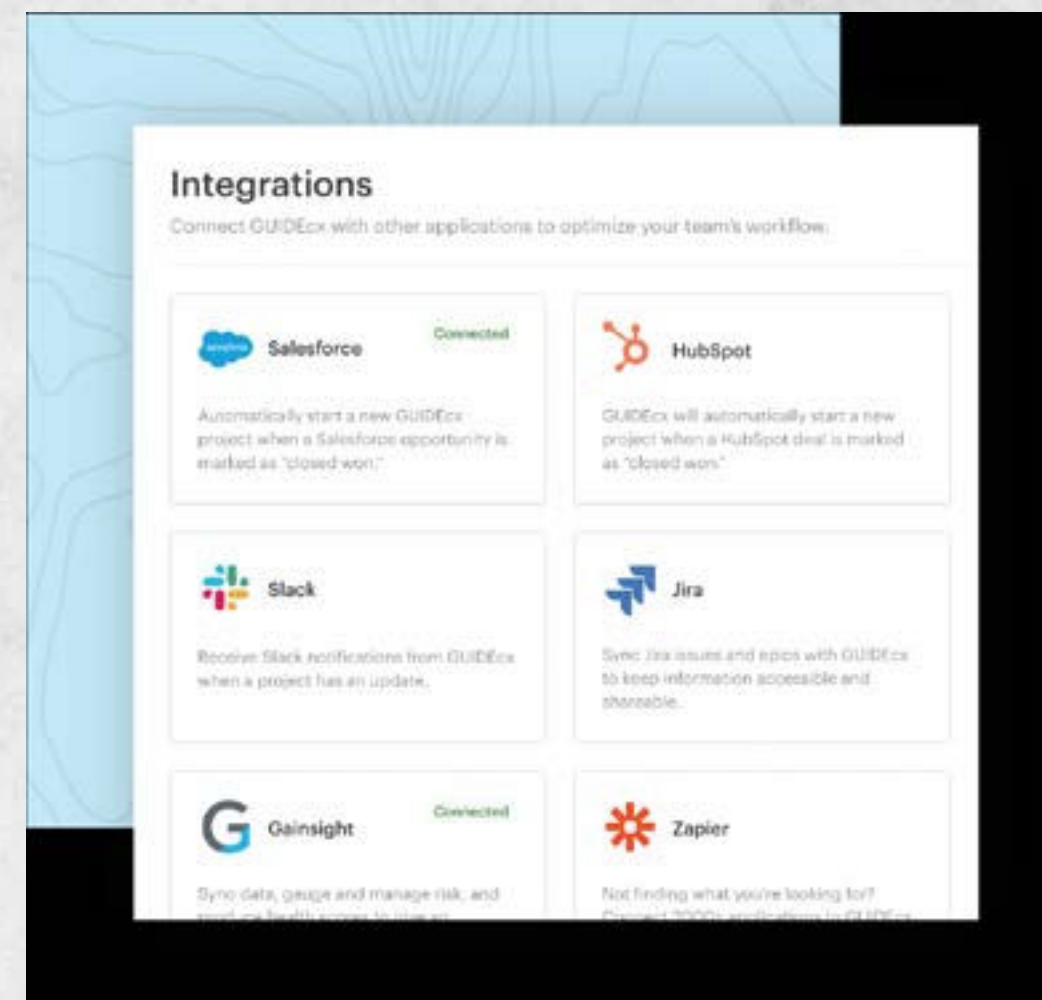
Sometimes things change. If a task is taking longer to complete than anticipated, or you need to add another step to the process, you need the system to **update in real time** so you can accurately forecast project completion timelines. Real-time updates and forecasting allow you to quickly manage and mitigate any risks that may occur from unexpected changes that arise.

True, real-time updates mean that when a project manager adjusts a deadline on one task, the entire timeline updates automatically, ensuring everyone has correct information. The ability to track **Status Change Reasons** allows the project manager to see not only that a task will be late but also the reason why. This helps bring bottlenecks to the surface more quickly, allowing you to pivot and mitigate risks as soon as possible. Because the system is built on transparency, all stakeholders can see exactly what is happening and why.



## #13: Will I be able to integrate my current tech stack into this platform in a way that doesn't disrupt current processes?

If you're currently working with a system such as **Jira**, **Slack**, or **HubSpot**, you need a solution that can easily integrate into your current process. Before landing on a solution, review the integration options they include or offer. An experienced platform will offer the **most common integration options** to keep your system moving forward as smoothly as possible.



## #14: What kind of support does this platform offer if I have additional questions or need assistance?

A solution is only as powerful as its people, and with the right team, you can achieve all your goals and even exceed them. The platform you choose should include an experienced team of individuals who can help guide you through the process, helping you identify solutions that will create an incredible experience for your team and customers alike. By guiding you through a process they understand well, this team should offer ongoing support whenever you need it.

Check to see if the platform offers a chat option for quick answers to your questions. Are the training and support included within the package pricing, or is it an add-on? What type of support is available if you need some help? These are all additional questions to include in your research.

After struggling to adapt to other tools, **PathologyWatch** was thrilled by the personalized solutions it received from GUIDEx. The support team led PathologyWatch step by step through the onboarding process and tailored the solutions to its needs. PathologyWatch was amazed at how quickly its onboarding process was implemented.

***“Working with GUIDEx is a pleasure. They teach us how to make their services work for us, address our pain points, and walk us through solutions. As someone who doesn’t have much time to implement new tools, I appreciated the move-in ready features GUIDEx provided.”***

– **April Larson**  
VP of Client Experience and Advisory Board,  
PathologyWatch

## #15: How efficient is the solution?

In order to understand how efficient the solution you are considering is, you’ll need to know how long your current onboarding process is taking. An efficient platform will streamline and automate your process in such a way that you can onboard much more quickly while maintaining the same level of service you’ve always provided. A solution that can decrease your onboarding time significantly will not only get you and your customers to value more quickly but also open up additional capacity for your project managers, giving them more time to onboard more customers, work on additional tasks, or dive deeper into project plans.

With the help of GUIDEx, **MaidCentral** was able to streamline, automate, and simplify its onboarding process. This shift to GUIDEx has resulted in onboarding tasks for clients being cut by 75 percent and the time to value for clients being reduced by 25 percent. Before switching to GUIDEx, it took four to eight weeks for clients to get value out of the MaidCentral software. Today, it takes an average of three to six weeks. Having a simple and straightforward onboarding system has helped more of MaidCentral’s clients experience success with MaidCentral’s software earlier.

***“The efficiency that we see from the GUIDEx software is incredible, we get so much value out of all of the reporting, tools, cadence of communications, automations, and integrations. We wouldn’t be able to do what we do without this software.”***

– **Austin Allen**  
Partner Implementation Supervisor, MaidCentral

## #16: How does this product rank among the other options on the market?



Before you settle on a solution, be sure to learn more about what people say about the platform. Is it easy to use? Has it been recognized for its customer service or platform experience? How do customers rate their experience after using the system? This research can help you better identify the right solution for you and your business. The right onboarding solution will be a **leader in its category**, with a depth of experience in helping companies just like yours succeed.

## #17: How good is its own onboarding experience?



You are about to select a solution for onboarding your customers. A good indicator to know if this is the right choice for your organization or not will be the solution's own onboarding experience. If the platform you are considering cannot onboard its customers efficiently with exceptional customer service and continued support, then how likely is it that your customers will have a great experience with the software? Start by reading reviews on the organization. Ask deep-dive questions about its onboarding plans, timeline, training, and support.

A solution that has plans and processes already built out will be able to break down your process, audit your system for existing holes, set you up with success-driven templates, define manageable timelines, and guide you through integration, making sure every stakeholder is invited and involved. The solution you choose should set you up for success so that when you're ready to bring on your own customers, you know they're going to have a similar, positive experience.

Using only spreadsheets to track their onboarding process, **Maxio's** internal team and customers recognized they were lacking valuable insights and clarity into their overall systems. With the implementation of GUIDEcx, Maxio cut six weeks off onboarding times, automated 20 percent of onboarding tasks, and increased customer engagement.

**"After talking with the [GUIDEcx] sales reps, we immediately knew that this was going to be the solution for us. They 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."**

– **Austin Allen**  
Partner Implementation Supervisor, MaidCentral

Learning how to differentiate between and evaluate customer onboarding solutions will help you make the right platform choice for your organization. Just like any other large investment, start by doing your homework, asking the right questions, and then selecting the solution that works best for you.

## How GUIDEcx can help

At GUIDEcx, we KNOW how to onboard. Our customers choose us for four distinct reasons:

- The incredible features we offer**
- The ease of use of the platform**
- The value they see after implementing the platform**
- The amazing support they are given during and after implementation**

GUIDEcx delivers the best customer onboarding experience, with vast experience working in different verticals. We understand common pain points and challenges and have developed solutions for all of them.

To learn more about what GUIDEcx can offer to take your organization to the next level, **reach out to us** online and ask for your free 30-day trial to get started.



 **GUIDE**<sup>CX</sup>