Onboarding: a profit center?

enerflo

Once upon a time in 2021...

Our onboarding was organized, defined, or properly valued.

- No template = no idea of what it took to onboard a partner
- No defined scope = perpetual state of work
- Tribal Knowledge = everyone had their own best way

Go-live: 4-6 months
Quality Assurance: Dismal
Attrition: ~1/6
Implementation Fees: rare & undervalued
Cost of onboarding?

Fast Forward to 2022

We onboarding GUIDEcx, monitored our costs and performance.

- Consolidated tasking w/GUIDEcx = repeatable deliverables
- Regular training = up-leveling of all onboarding personnel
- Data Deep Dive w/ GUIDEcx = real story vs. the story we tell ourselves
- Adoption of GUIDEcx best practices = measuring the right behaviors

Go-live: ~35 days
Quality Assurance: rock-solid
Attrition: ~1/25
Implementation Fees: ~$4500

Path to Profitability

Costs: Who touches the customer between sales and go-live?

Value: Are you using a company or industry standard rate for work?

Profit: Do you add a small buffer? Or do you charge a healthy rate?

Consistency: If the implementation requires work, charge for it. .

$3,559.60 AVG Cost to Onboard

Roles	# of Tasks	estimated_hours	Cost to Onboard (SM)	Cost to Onboard (MD)	Cost to Onboard (LG)
PM	41	36.60	1,339.34	$1,521.98	1,704.62
Onboarding Specialist	59	49.00	1,793.11	$2,037.62	2,282.14
GRAND TOTAL	100	85.60	3,132.45	$3,559.60	3,986.76

Where do we go from here?

How do you know how much to charge?

At what point should you start charging?

How do you track if you're charging enough?