GUIDECX

Leveraging Sales Strategy in Customer Onboarding
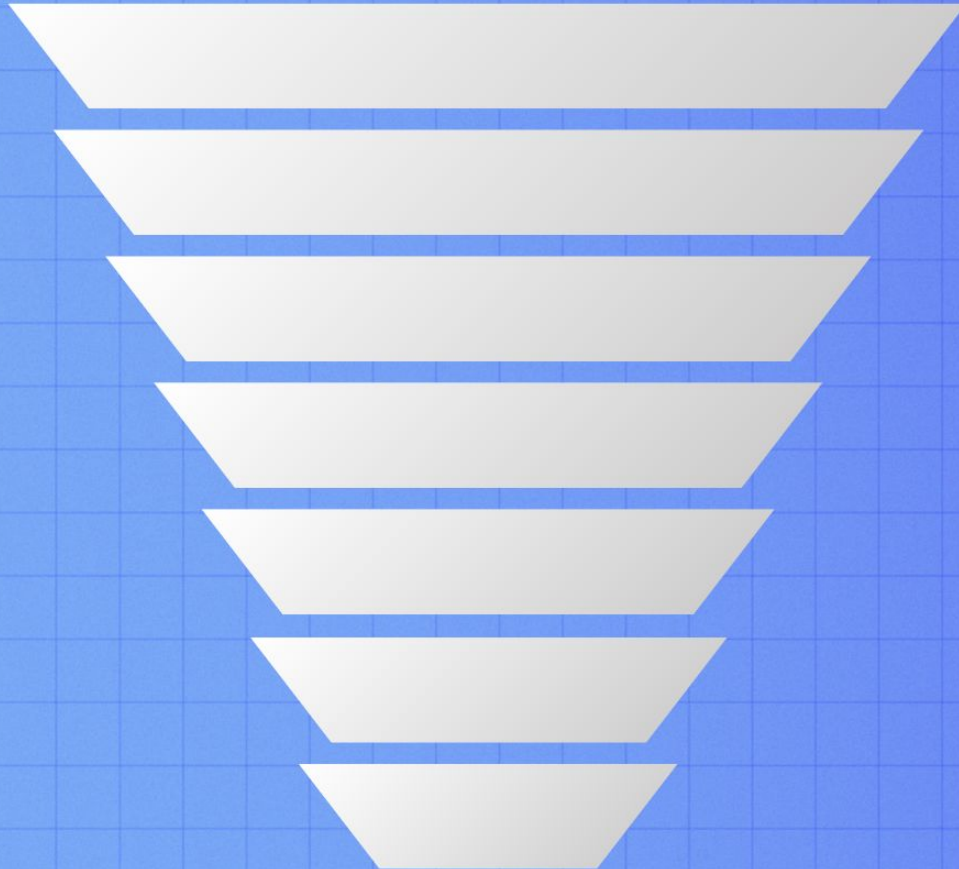
Introduction

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Prospecting

Qualification

Meeting

Proposal

Negotiation

Closing

Post-purchase

Don't just show up!

Discovery Questions for Onboarding

Goals + Success Metrics

Challenges / Pain Points

Team Structure + Stakeholders

Understand Current Environment

Timeline + Expectations

Risks / Barriers to Adoption

Discovery Questions for Onboarding

Goals + Success Metrics

- What are the primary goals you hope to achieve with our solution?
- What specific outcomes are you looking for in the first 3, 6, and 12 months?
- How will you measure the success of our solution in your organization?
- Are there any key performance indicators (KPIs) that are particularly important to you?
- How do you define "success" in relation to [the problem you're solving with our product]?
- Are there any other business objectives or initiatives this solution will need to align with?

Discovery Questions for Onboarding

Challenges + Paint Points

- What specific challenges are you currently facing that you expect this solution to address?
- Have you experienced any previous difficulties with similar products or solutions?
- What are your current pain points in your workflow, and how does this solution fit into solving them?
- What manual tasks or bottlenecks are you hoping to automate or improve with this product?
- What is the biggest challenge your team is facing in terms of [relevant process] today?
- What impact are these challenges having on your team or business goals?

Discovery Questions for Onboarding

Team Structure + Stakeholders

- Who will be the primary users of this solution on your team?
- Can you tell me more about the roles of the team members involved in this project?
- Who are the key stakeholders we should keep in mind throughout this process?
- What does the decision-making process look like within your team for new technology solutions?
- Who will be responsible for managing and overseeing the implementation of this solution?
- Are there any other departments or teams that will need to be involved in using this product?

Discovery Questions for Onboarding

Understanding Current Environment (Tech Stack)

- What technology are you currently using to handle [relevant process]?
- Are there any integration requirements with your existing tools or systems?
- What does your current tech stack look like, and where do you see this solution fitting in?
- Are there any specific tools or platforms that this solution must integrate with?
- Are there any challenges in your current tech environment that you hope this solution will help resolve?
- What limitations do your current tools or systems have that you are looking to overcome?

Discovery Questions for Onboarding

Timeline + Expectations

- What is your ideal timeline for rolling out this solution?
- Are there any key milestones or deadlines we should be aware of for this project?
- What are your expectations for the onboarding and implementation process?
- When would you like to start seeing measurable results from using our solution?
- What resources or support do you need from us to meet your timeline?
- Are there any upcoming events or business cycles that we should consider when planning the implementation?

Can you recommend strategies to convince customers to align with a recommended project timeline?

-George C.

Discovery Questions for Onboarding

Risks / Barriers to Adoption

- What potential obstacles do you anticipate during the adoption of this solution?
- Are there any concerns you have regarding the implementation or adoption of this product?
- What would make this solution difficult for your team to adopt or integrate into their daily workflows?
- Are there any external factors (e.g., market trends, competition) that might impact the success of this project?
- What challenges do you foresee in training your team or getting buy-in from stakeholders?
- Have you encountered resistance to change or new technologies in the past, and how did you overcome it?

2. Multithreading

The reality is that the average **sales cycle (including renewals) now requires 11+ people**

But most reps are only connected to 1-2 people.

Ally
Influencer
Influencer
Decision Maker
Decision Maker
Champion
Leader
Key Decision Maker
Leader
Seller
Champion
Ally

Gartner expects sales organizations who multithread to **outperform competitors by 50%***

Why should sales teams multithread?

1. Minimize the risk associated with turnover

2. Increase the likelihood of closing

3. Reduce the length of the sales cycle

Multithreading for Onboarding

Internal Champion

Product Users

Executive Sponsor / Purchaser

When 5+ customer users are invited, on-time completion rate jumps to over 90%.

How do you keep "above the line" stakeholders involved through onboarding and into the adoption phase of the customer journey?

-George H.

When onboarding a client with a large number of end users, how to you best reach the population to maximise awareness, engagement and a call to action?

-Leanne G.

3. Connecting

61% of B2B buyers say they read at least 3 case studies before making a buying decision

35% faster sales cycle for sales teams using case studies and testimonials

CASE STUDY

3. Connecting

- **Set the tone for success**
  - Share relevant case study at the beginning of onboarding to reassure and reinforce value sold in the sales cycle

- **Introduce social proof during critical touchpoints**
  - Example: "Now that you've completed setup, you're ready to use [Feature X]. Companies like ABC Corp. found that using this feature saved them 10 hours a week. Here's what they had to say…"

- **Enable peer learning and connection to thought leaders**
  - Community
  - Consultants
  - CAB

4. Creating Urgency

4. Creating Urgency

"If you go live by __, we'll give you ____."

- Additional users
- Reduced onboarding fee
- Discounted price

MAXIO