PRECURSIVE TOOLKIT.

HOW TO BUILD CUSTOMER ONBOARDING & IMPLEMENTATION PLAYBOOKS

PRECURSIVE

PLAN. TRACK. FORECAST.

PRECURSIVE

PRECURSIVE **TOOLKIT.**

STEPS **FOR IMPLEMENTATION.**

WHAT TO DO.	WHAT IS IT?
Set Expected Outcomes	What are the customer expectations on when they can start using your product or service?
Define Value	In the transition from sales to customer onboarding, your team should confirm how the customer has defined this value. Focus on how they articulate value and not just how you have defined this internally.
Build a Repeatable Process	To scale customer onboarding effectively, it is essential to define a repeatable process. This allows you to manage this process consistently and create a common language for your team to where each customer is in the process.
Communicate a Plan	A "Customer Plan" should focus on the key items for your client to work on and complete during the onboarding process, e.g. provide user details, fill out data templates, testing (UAT) or providing feedback on progress.
The Kick Off	This is the most important step in the onboarding process and your biggest opportunity to establish expectations and define what success looks like. Make sure that ALL key stakeholders attend this meeting including your exec sponsor, key mobilizers, customer project manager and the appropriate subject matter experts.
Measure the Success of Customer Onboarding	Track progress across your customers so you can see where each customer is in their onboarding journey. Leading KPIs are predictors of an objective, e.g. predicted go-live date.
Benchmark and Iterate	There is a strong correlation between customer onboarding health and value realization with year-one retention. The best companies benchmark their performance against their peers and will iterate on ways to improve performance over time.

SET **EXPECTED OUTCOMES.**

PRECURSIVE

GUIDANCE	BEST PRACTICE CHECKLIST	Y / N
Setting and managing customer expectations across the customer onboarding helps improve customer experience.	We have reviewed pre-sales conversations with the customer along with historical interactions.	☐
	We have introduced the customer to the delivery and customer success team as early as possible.	☐
Once a new customer has agreed to work with you, they are excited and eager to get their hands on your product or service.	We have a clear understanding of the customer's challenges and the outcomes they wish to achieve. This is learned via an internal review between sales and post-sale teams.	☐
	We have identified key business and technical requirements highlighted by the sales team.	☐
If they expect to be using your product within one week, then you need to make that possible, or you will have an expectation gap.	We have a clear understanding of customer expectations regarding the duration of the implementation.	☐
	We know when the customer expects to be using our product or service and what the urgency drivers are.	☐

DEFINE **VALUE.**

PRECURSIVE

GUIDANCE	BEST PRACTICE CHECKLIST	Y / N
The best companies capture how the customer defines value and value realization during the sales process.	We can articulate how the customer defines value in their language, not ours!	
	We have agreed criteria with the customer on how we will measure whether value has been achieved.	
The team responsible for onboarding is able to playback to the customer their understanding of value creation in the language of the customer.	We have a plan to get to value in the appropriate (potentially shortest) possible time.	
	We have documented how the customer defines value and how it will be measured.	
Aim to develop the mindset of your sales, onboarding, services and success teams to be rooted in customer value realization.	We have analyzed the risk factors that could destroy the value in the customers eyes.	
	We have mapped the activities that will contribute to creating the most value for the customer.	

BUILD **REPEATABLE PROCESSES.**

PRECURSIVE

GUIDANCE	BEST PRACTICE CHECKLIST	Y / N
This process will include the activities that your team needs to do as well as tasks for customers across the process.	We have mapped out the activities that contribute to the overall onboarding process.	☐
	We have allocated task and responsibilities to different team members based on skills or knowledge.	☐
The best companies focus on having the minimum number of steps and the least amount of admin for both your team and your customer.	We understand the amount of time it should take to complete each activity.	☐
	We have forecast the capacity required to deliver this work by our team.	☐
This process will be scalable and allow you to manage a high volume of workload or multiple projects at the same time.	We have highlighted dependencies between activities as well as key milestones for our customer.	☐
	We have identified key risks and blockers that can derail this plan and made the customer aware of them.	☐

COMMUNICATE **A PLAN.**

PRECURSIVE

GUIDANCE	BEST PRACTICE CHECKLIST	Y / N
Be aware that the activities that are important to your onboarding team are not always as relevant to the customer.	We have created a summary of all key activities which the customer needs to participate in.	☐
	We have mapped out which subject matter experts from the customer need to be engaged and when.	☐
Your customer will appreciate seeing a version of your plan that shows them the most important steps and dependencies for their team.	We have created a "Customer Plan" which has been shared with the customer, this plan highlights key activities, dependencies, and milestones.	☐
	We have told the customer how much time they will need to invest across the project and when this will happen.	☐
The biggest delays in customer onboarding are caused by the customer not knowing what they need to do and when.	We have agreed a communications cadence with the customer including a weekly check-in and written communications summary.	☐
	We have a portal or document storage facility where all project related documents and templates live.	☐

THE **KICK-OFF.**

PRECURSIVE

GUIDANCE	BEST PRACTICE CHECKLIST	Y / N
This is a critical meeting for the success of customer onboarding.	We have checked that the kick-off appointment has been accepted by ALL stakeholders.	☐
This session sets the whole tone for the rest of the implementation.	We have shared and agenda and timings in advance of the kickoff (book an extra 30 minutes to give you wiggle room).	☐
The best companies set the right altitude for the session prior to the meeting and through the introduction.	We have prioritised finding out who the internal champion is (this my differ from the internal champion for the sales team).	☐
	We make sure that the customer understands your team, roles and responsibilities and we have identified bottlenecks that we need to monitor.	☐
The outcome of this session is a clear mutually agreed plan and path on how we will proceed.	We have created an *executive summary for* the kick-off - this summary plays back the business case from the sales cycle, summarizes the value the customer wants to achieve through specific outcomes.	☐
	We confirm and plan out next steps including meetings and book that time in the kick-off.	☐

MEASURE **IMPLEMENTATION SUCCESS.**

PRECURSIVE

GUIDANCE	BEST PRACTICE CHECKLIST	Y / N
The best companies track and measure how effectively they are performing towards key objectives.	We have established the key KPIs that will be drivers of success for our teams and customers.	☐
	We have agreed our relevant time based KPIs, e.g. Time-to-Value, Onboarding duration.	☐
Leading KPIs are predictors of an objective, e.g. predicted go-live date.	We will track customer advocacy during onboarding/implementation phase, e.g. Customer Sentiment, CSAT.	☐
	We have an agreed interpretation of customer health during the implementation, e.g. Red, Amber, Green.	☐
Lagging KPIs are retrospective measure of the actual success and results of your onboarding process.	We have a variety of adoption metrics as a part of our KPIs that are known to drive successful outcomes.	☐
	We capture and track any risks that will block the customer realizing value.	☐

BENCHMARK AND **ITERATE.**

PRECURSIVE

GUIDANCE	BEST PRACTICE CHECKLIST	Y / N
The best companies iterate on their processes over time.	We have made our first attempt to capture what good looks like for our various forms of delivery, e.g. "Implementation of product A should look like this, take this long and achieve x value".	☐
Data captured during onboarding can be fed back to sales, product and marketing teams as well help customer success maximize growth opportunities and productization.	We have begun tracking performance across our established KPIs.	☐
	We will measure performance over a suitable time horizon depending on the complexity of our delivery, e.g. we track performance over time quarter by quarter.	☐
Precursive's benchmark survey shows leading companies attribute performance indicators with health scores post-launch and then correlate these with the customer's overall health score.	We have benchmarked our approach compared with our peers.	☐
	We are tracking the reasons for delay and are using this data to inform future delivery, process improvements, team coaching and/or product development.	☐
	We have gather external input and insight from Precursive's Customer Onboarding Benchmark Survey.	☐

PRECURSIVE DOES **IMPLEMENTATION IN SALESFORCE.**

PLAN

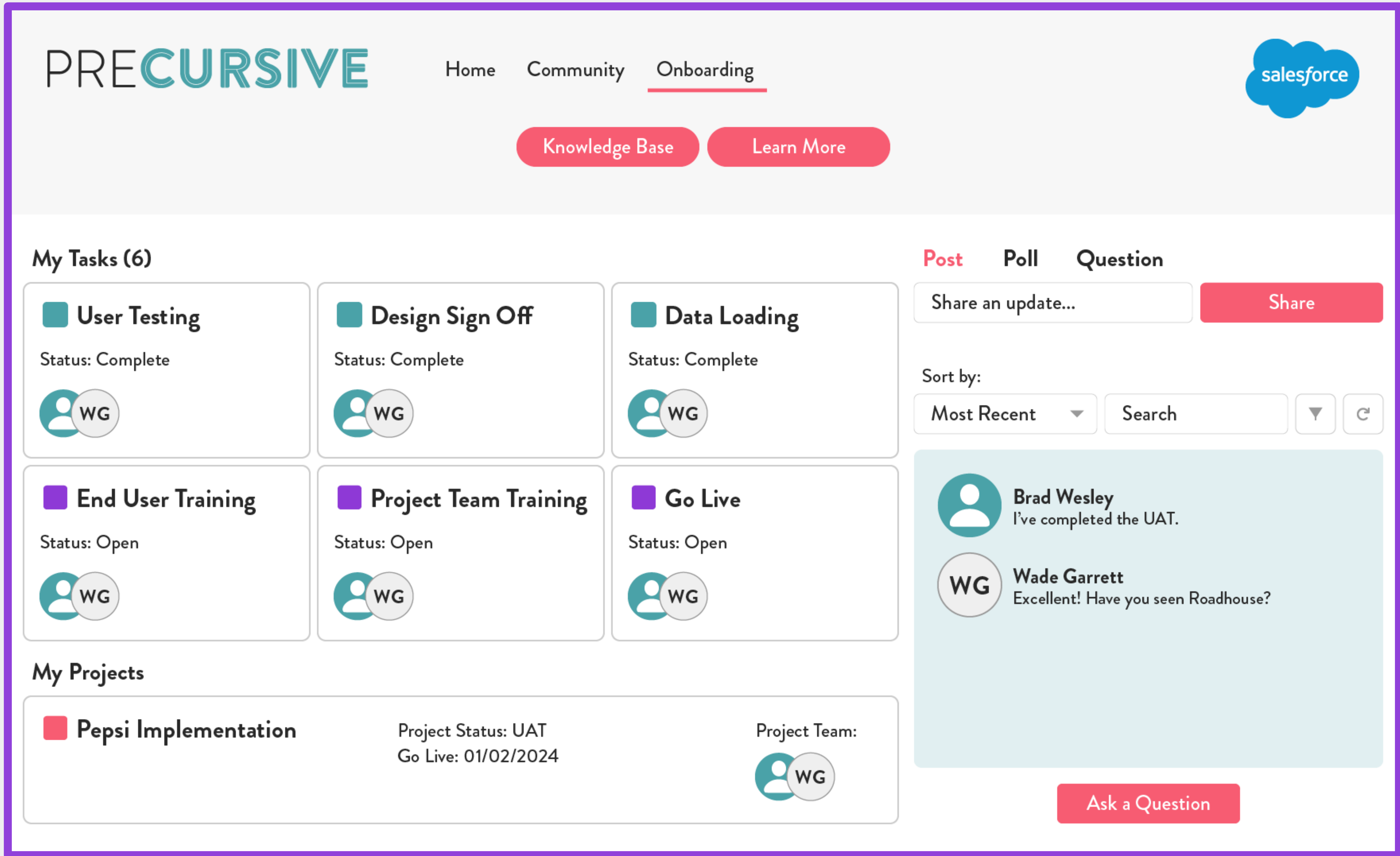
Who is on what and where are blockers?

TRACK

Are we on track to deliver value on time?

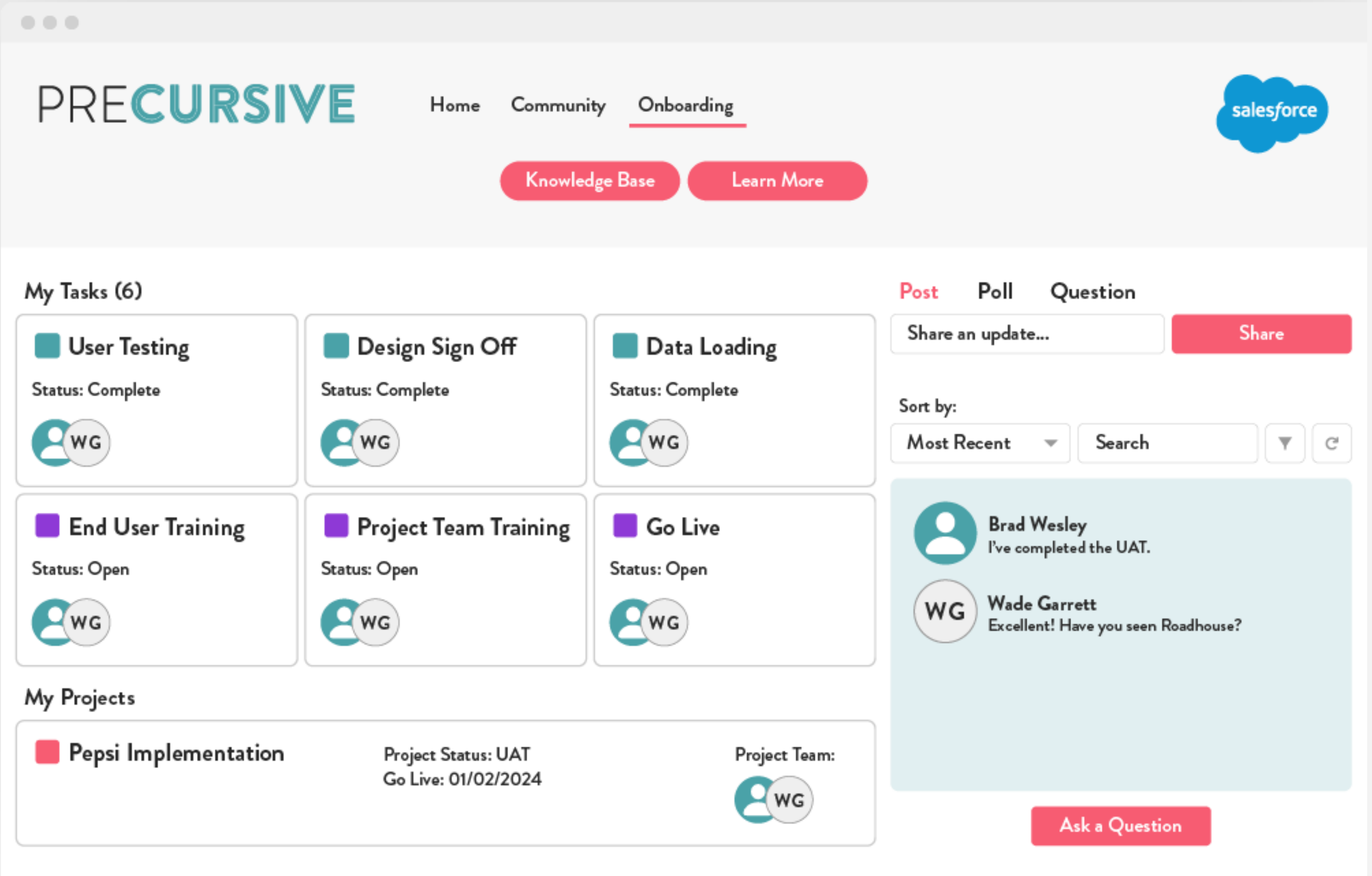
FORECAST

What work is complete & how long is it taking?



PRECURSIVE

HOW PRECURSIVE COLLABORATES **WITH CUSTOMERS.**



SHARE

Customers see what they need to do and when

FIND

Customers can search, edit and prioritize tasks

OUTCOME

Customers ask questions and mark work complete

IMPACT FOR CUSTOMERS

Dealertrack — $1m Cost Saving

procurify — 45% Faster TTV

CONDECO — +10% Utilization

SES your satellite company — +$65m Revenue

ATLANTIC TECHNOLOGIES — 100% Billing Accuracy

PolSource — 50% Less Free Work

P3 ADAPTIVE — 144 Days Saved

PRECURSIVE

THE SERVICES DELIVERY CLOUD FOR SALESFORCE

PLAN. TRACK. FORECAST.

www.precursive.com