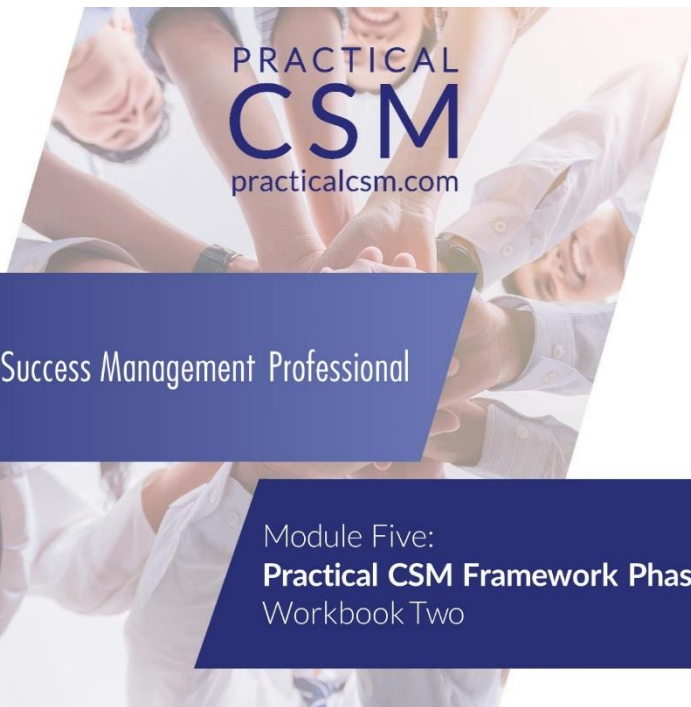




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Module Five:
Practical CSM Framework Phase 3: Onboarding
Workbook Two

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Module Five:
**Practical CSM Framework Phase 3:
Onboarding**
Workbook Two

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Welcome back to Module Five of the PracticalCSM.com Certified Customer Success Management Professional training course.

In Workbook One we defined what we meant by the term “onboarding” and contrasted it with the terms “adoption” and “value realization”. We looked at the importance of getting onboarding right, and we discussed how to select between generic and customized onboarding service models. After that we briefly review each of these service models.

In this second Workbook for Module Five we are going to look at the practical side to onboarding from the CSM’s perspective and review each of the tasks that customer success managers might need to perform, including assessing the level of onboarding complexity for a specific initiative, meeting with the customer to discuss and agree their onboarding requirements and what help the CSM’s company will provide, selecting a generic or a customized onboarding service approach, gathering information, and managing the process.

Practical CSM Framework Phase 3: Onboarding – Agenda

- Estimating Onboarding Complexity
- Onboarding Discussions with the Customer
- Selecting a Generic or Customized Onboarding Approach
- Information for Generic Onboarding
- Information for Customized Onboarding
- Managing the Onboarding Process
- Developing the Right Onboarding Services



In this workbook we will be looking at practical ways to plan for and manage the onboarding process, with particular reference to: techniques that can be used to estimate the likely complexity of a customer's onboarding requirements, onboarding discussions with the customer, selecting a Generic or Customized Onboarding Approach, the types of information to research and analyze for a standard, generic onboarding implementation, the additional types of information you might need to research and analyze for a bespoke, customized onboarding implementation and how to manage the onboarding process. The video finishes with a discussion on how a company might approach the problem of developing the right onboarding services that will deliver maximum value to its customers.

Four “Influencers of Onboarding”

- The generic complexity of each of the solution components
- The level of unique customization required by the customer
- The customer’s needs for adoption and utilization of the solution
- The customer’s maturity and preparedness levels for adopting and utilizing the solution



There are four “influencers of onboarding” that will between them give a reasonable indication as to the likely level of onboarding complexity for a particular customer engagement. These are: the overall complexity of each of the solution components, the level of unique customization required by the customer, the customer’s needs for adoption and utilization of the solution (particularly where multiple end users or end user groups are involved), and finally the customer’s maturity and preparedness levels for adopting and utilizing the solution.

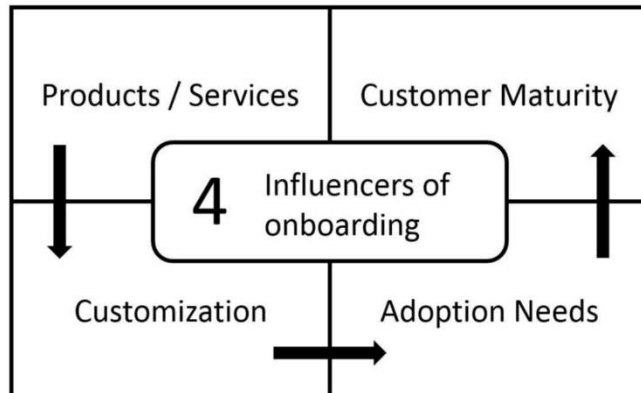
The generic complexity of each of the solution components

The level of unique customization required by the customer

The customer’s needs for adoption and utilization of the solution

The customer’s maturity and preparedness levels for adopting and utilizing the solution

Four “Influencers of Onboarding”



Where one or more of these aspects of the initiative are rated as medium to high there may be a need to expend more effort in onboarding than where all of these aspects of the initiative are rated as medium to low.

The Customer Onboarding Scoring Matrix

- A quick way to estimate the overall level of work required for onboarding a particular customer
- Based upon the four criteria of product/service complexity, customization work, adoption requirements and customer maturity levels.
- Each influencer is rated from 0 to 5, and the overall score provides an indicator of complexity



A Customer Onboarding Scoring Matrix can be found on worksheet 1 of the Customer_Onboarding_Templates Microsoft Excel workbook. It provides a fast and simple way to determine the overall level of work required for onboarding a particular customer, based upon a process of scoring the customer for each of these four criteria of product/service complexity, customization work, adoption requirements and customer maturity levels.

The way the tool works is that for each influencer, you will be asked to provide a score from 0 to 5, where 0 means no complexity due to this influencer and 5 means a very high level of complexity due to this influencer. In this way you will come up with an overall score between 0 and 20, which you can then use to help understand the overall onboarding complexity for that customer. The larger the total number the more complex the customer's onboarding needs. It's only a broad indicator, but it's a good starting point to prepare the CSM for more detailed discussions about onboarding needs with the customer's stakeholders.

Aspect	Score (0 to 5)	Explanations
Products/Services	3	Score 0 for simple solutions and 5 for complex solutions
Customization	1	Score 0 for minimum customization and 5 for maximum customization
Adoption Needs	2	Score 0 for simple adoption needs and 5 for complex adoption needs
Customer Maturity	2	Score 0 for high maturity and 5 for low maturity
TOTAL	8	

Key	Products/Services	The generic complexity of each of the solution components
	Customization	The level of unique customization required by the customer
	Adoption Needs	The customer's needs for adoption and utilization of the solution
	Customer Maturity	The customer's maturity and preparedness levels for adopting and utilizing the solution

Results Indicator		
0 to 5	Simple	A simple onboarding requirement needing only a basic, low touch approach
6 to 10	Straightforward	A straightforward onboarding requirement that may need a small amount of customization and/or planning
11 to 15	Fairly Complex	A fairly complex and customized onboarding requirement that needs to be planned in advance
16 to 20	Highly Complex	A highly complex onboarding requirement with very bespoke needs, requiring careful planning and project management

Instructions		
<ul style="list-style-type: none"> To use this tool simply insert a number from 0 to 5 in each of cells C3 to C6, following the advice for each row in Column D If you cannot remember what each row means you can review the information in the Key in rows 10 to 13 Cell C7 will automatically add up and display the total for you, which you can then compare with the Results Indicator shown in rows 16 to 20 Remember that this is a very simple "ready reckoner" and is designed just to give a quick and simple indication (only) of the likely level of onboarding requirement 		

In the example shown here, the Customer Onboarding Scoring Matrix has been used to score a particular engagement, and the result is a score of 8, which indicates that this engagement will likely require a "Straightforward" onboarding approach, which is defined as "A straightforward onboarding requirement that may need a small amount of customization and/or planning".

One final point about the Customer Onboarding Scoring Matrix is that some individual CSMs or Customer Success teams may find that they want to refine, amend or otherwise improve upon this tool in order to meet their own specific requirements. There is no reason why a CSM or CS team couldn't use the Customer Onboarding Scoring Matrix as a start point for developing their own scoring tool that provides a more accurate and detailed indication of a customer's onboarding requirements by adding additional data points and scoring metrics alongside or in replacement of the ones that this basic version of the tool employs.

Onboarding Discussions with the Customer

- For basic, generic onboarding situations, a simple one-way communication of information may be all that is required
- If a more in-depth or customized onboarding service is being offered, there may be a need for multiple, two-way sharing of information
- In this situation a face-to-face meeting is probably best



If you do not provide any onboarding options, and if you do not customize the “Welcome Kit” in any shape or form whatsoever (perhaps other than things like the names of the lead stakeholders, the numbers of licenses sold, start dates, etc), when it comes to customer conversations it may simply be a case of arranging a meeting that effectively is a one-way communication of information from you to them. In that sort of meeting you will probably want to review the contents of the “Welcome Kit” with the SPL and any other key stakeholders who have been invited and give them a chance to ask any questions. For more complex situations, this meeting needs to be face-to-face, but for more simple solutions and/or for CSMs who hold a large number of customers within their portfolio and who cannot afford to spend much time with any one customer, this meeting might be arranged online as a virtual conversation using a virtual collaboration tool such as WebEx, Skype or Zoom to enable screen sharing.

On the other hand, if your company provides a range of different onboarding services for the customer to choose from (perhaps with costs associated to some of these services) and/or if your one and only onboarding service does in any case include customization of its content to suit the specific needs of each customer, the CSM will need to hold a two way conversation with customer stakeholders about the onboarding options your company offers and/or the specific needs of the customer, in order to get their input, enable them to make any decisions they need to make and to provide you with any information you need to have.

Onboarding Discussions with the Customer

- To conduct the meeting, follow the order of the four influencers of onboarding, discussing each one in turn
- Pay attention to the onboarding needs of end users
- You need to understand how much the customer is capable of and has an appetite for managing end user onboarding and adoption themselves, and how much they want or need to rely on your company for it



The simplest way to conduct such a meeting is to follow the order of the four influencers of onboarding, starting with a conversation about the products and services themselves, then moving to a review of any customization work that has been or will be carried out which might influence the onboarding requirement. After this you can ask the SPL and other stakeholders as necessary to fill you in on the onboarding needs of their users. Following this you can discuss to what level they are able or willing to take a DIY approach and how much and what type of help and assistance they are looking for from the CSM's company.

Onboarding Discussions with the Customer

- Make sure you understand any specific outcome requirements that the customer is looking to achieve
- For each outcome, they should specify:
 1. Quality (what is it?)
 2. Quantity (how much of it is required?)
 3. Deadline (when is it needed by?)



In addition to these four influencers of onboarding you should also ask for any specific outcome requirements that the customer is looking to achieve from their onboarding process. For each outcome try to get the customer to commit to three aspects:

1. Quality (what is it?)
2. Quantity (how much of it is required?)
3. Deadline (when is it needed by?)

Onboarding Discussions with the Customer: EXAMPLE

- Customer has 525 end users across 7 teams who will be impacted by the initiative
- All users must be made aware of how the initiative will impact their role and given the opportunity to discuss it with their line managers
- The initiative will be multi-phased over 4 locations, and onboarding must occur one month ahead



At this stage you should be reasonably well positioned to explain the different onboarding options that your company can offer and discuss the relative value to the customer of each option within the context of the customer's own desires and needs. You may of course need to take the information away to discuss with others within your company in order to determine any fees, and there may be some negotiations to conduct at this stage, but hopefully you should be able to arrive at a definition for what onboarding services will be provided, how the work will be done, who will be responsible for which activities, when these activities will occur, how the results will be measured and how and when you will communicate with the customer.

Customized Onboarding and Full Adoption Services

- Part of the information that CSMs will be researching, analyzing and discussing with customer stakeholders is the end user adoption requirements and the implications of these requirements that exist for each of the products and services within the solution
- Two approaches to end user adoption: vendor-specified, or customized to the users' specific roles



Part of the information that CSMs will be researching, analyzing and discussing with customer stakeholders is the end user adoption requirements and the implications of these requirements that exist for each of the products and services within the solution. This might be standard information relating to vendor-specified user roles (Admin, Management, Power User, Standard User, etc) or might be specific to the processes within the customer's capabilities that each user group will be following. The former approach is a lot easier to research and document since vendor documentation should already exist for each predefined role. The latter, much more bespoke approach is harder to research and document but of course has the advantage of being tailored to specific usage for each product or service that each user group will make of it.

Three Choices for Onboarding:

- A generic onboarding service that gets the customer started with their newly purchased solution
- A customized onboarding service that tailors the information and messages to specific audiences
- A fully bespoke “onboarding and adoption” service that delivers full end user readiness



Essentially then, there are three choices for onboarding:

A generic onboarding service that provides a basic “Welcome Kit” and gets the customer started with their newly purchased solution

A customized onboarding service that tailors the information and messages it contains to suit a variety of audiences within the customer’s organization

A fully bespoke “onboarding and adoption” service that provides help and assistance to the customer right through the entire process of planning and implementing all of the communication, training and certification, support and measurement needed to get all of the customer’s users up and running with using and generating value from the solution

Whilst it might be hard work to achieve, this latter, very tailored approach can actually be extremely powerful from the perspective of the value it returns to the customer and in fact goes beyond “onboarding” (ie the initial communication of what the initiative is, what changes will occur and how it affects people) and becomes full “adoption” (ie the completion of readiness of all users so that value realization can commence). The full Adoption cycle is explained in Chapters 7, 8 and 9 of the book and we will be discussing it in depth within the next two modules of this training course.

If you are providing both a bespoke onboarding service and a fully featured adoption service to your customer then rather than performing everything twice, the CSM should consider onboarding and adoption as being one adoption project, with onboarding being the first phase within that project. The

advantage of taking this approach of course is that it prevents the need to double up on research, analysis, customer meetings etc. The work needed to determine bespoke end user requirements and create a full adoption plan around those requirements is explained in depth within the next module – Module Six.

Information for Generic Onboarding

- Generic onboarding will generally require less information to be gathered and analyzed than customized onboarding
- The exact information you need to document may vary depending upon your company's requirements
- CSMs can reference previously documented information and can use the Onboarding Requirements Capture template or their own company's tools or templates



Being the less complex type of onboarding, generic onboarding will generally require less information to be gathered and analyzed beforehand than customized onboarding will. Of course every company is different and every company's customers are different, so in your real world customer facing scenarios the exact information you will need might vary because of what products and services you sell and might also vary from customer to customer, so although we will look at all of the information that you are most likely to need as a CSM when faced with a generic onboarding requirement, please do bear in mind both that sometimes you may not need all of the information we're about to review, and it is also entirely possible that you may sometimes need *additional* information that we do not describe here.

Information for Generic Onboarding

	A	B	C	D	E	F	G	H
1	Customer Name		SPL Name		SPL Email		SPL Mob	
2	Initiative Name		SPL Title		SPL Tel		SPL Location	
3								
4		Name	Version	Quantity	Consumption Model	Configuration Included	Configuration Needed	Additional Information
5	Product / Service 1							
6	Product / Service 2							
7	Product / Service 3							
8	Product / Service 4							
9	Product / Service 5							
10	Product / Service 6							
11	Product / Service 7							
12	Product / Service 8							
13	Product / Service 9							
14	Product / Service 10							
15								
16		Name	Version	Additional Information				
17	Support Service 1							
18	Support Service 2							
19	Support Service 3							
20	Support Service 4							
21	Support Service 5							
22								
23		Name	Version	Additional Information				
24	Professional Service 1							
25	Professional Service 2							
26	Professional Service 3							
27	Professional Service 4							
28	Professional Service 5							

To research and document this information, CSMs can reference back to information already captured and documented during Practical CSM Framework Phase 1: Preparation and Phase 2: Commitment, and can complete any missing information that is required for onboarding either by using worksheet 2 of the Onboarding Requirements Capture template provided by us, or by using their own company's existing tools, templates or software systems as necessary.

Let's take a look at the information in the worksheet for generic onboarding:

Information for Generic Onboarding: 1. Basic Customer Information

- Standard information about the name of the company, the name of the initiative, and the name, business title of and contact information for the Senior Project Lead or SPL.



Basic Customer Information

Standard information about the name of the company, the name of the initiative, and the name, business title of and contact information for the Senior Project Lead or SPL.

Information for Generic Onboarding: 2. Products, Services and Solutions Sold

- A list of what products, services and solutions the customer has purchased
- Where what has been sold is a solution comprising multiple components it may be a good idea to list those components out individually in order to gain a better understanding of the true level of complexity of onboarding needs.



Products, Services and Solutions Sold

This is a list of what the customer has purchased. This may be as simple as one product, one service or one solution, or may be very complex and incorporate multiple products, services and solutions – maybe even from multiple vendors and potentially even going beyond what is being supplied by the CSM's own company.

Where what has been sold is a solution comprising multiple components it may be a good idea to list those components out individually in order to gain a better understanding of the true level of complexity of onboarding needs.

Information for Generic Onboarding: 3. Licensing and Consumption Models

- The consumption model for each product or service, including when any contracts commence and when they end
- These start and end points can be included within the onboarding “Welcome Kit” information and any subsequent communications and discussions.



Licensing and Consumption Models

For each product or service, the consumption model should be explained here. This might be an outright purchase on a per unit basis, a software licensing model (including options such as per named user, per server, per simultaneous log on, or a corporate-wide license), a professional services contract with a stated beginning and end point, or an as-a-service approach with a rolling monthly or annual contract to be renewed. Understanding the way in which the products and services are licensed and consumed is of course important to the CSM in general terms, since part of their role will be to maximize renewals, but specifically in the onboarding process it's important to understand when any contracts commence and when they end, so that these start and end points can be included within the onboarding “Welcome Kit” information and any subsequent communications and discussions.

Information for Generic Onboarding: 4. Configuration and/or Customization Included

- The configuration and/or customization the customer has requested to be provided for each product or service.
- This information is essential, because it will need to be explained within the onboarding “Welcome Kit” and taken into account in discussions around topics such as training and support requirements.



Configuration and/or Customization Included

Some types of products and services generally or even *always* require a certain amount of configuration and/or customization before they can be used. For these products and services it is often the case that basic level configuration and customization is included within the standard purchase price (since it is non-optional). If this is the case, or even if there is bespoke (ie paid for) configuration and/or customization but the decision has been made to go with a generic-only onboarding process, this is where to capture and document what configuration and customization options have been selected.

Again, this information is essential, because it will need to be explained within the onboarding “Welcome Kit” and taken into account in discussions around topics such as training and support requirements.

Information for Generic Onboarding: 5. Configuration and/or Customization Needed

- The configuration and/or customization the customer will themselves be performing for each product or service .
- As before, this information is essential, for the onboarding “Welcome Kit” and may not already be known.



Configuration and/or Customization Needed

This is a separate section to notate any configuration or customization work which the customer indicates they intend to do themselves or get done for them by a third party, which may therefore again impact the onboarding documentation, even though this is not work that the CSM’s own company is carrying out. This is a particularly important section to discuss with the customer, since this information may not already have been uncovered or discussed in detail or even at all in pre-sales conversations and so it may not as yet be known about.

Information for Generic Onboarding: 6. Support Services

- Support information to be included within the onboarding “Welcome Kit”
- Options selected by the customer for support, and details surrounding how the support is accessed, who will use it, etc should be documented in this section.



Support Services

Support information is likely to be high on the list of information to be included within the onboarding “Welcome Kit”. Options selected by the customer for support and details surrounding how the support is accessed, who will use it, etc should be documented in this section. For example there may be several levels of support, with end user support being fulfilled by the customer itself, second line support being provided to the customer’s support professionals by the CSM’s own company and third line support being backed off to the product or service vendor. In this example, the details of how this works needs to be noted, along with information relating to the process to be used by the customer for accessing the second and third line support services.

Information for Generic Onboarding: 7. Professional Services

- Professional Services such as on-premises install and configure, integration, customization and management & maintenance that have been purchased or are included within the deal
- How the services should be used, and any important dates regarding when the services will commence and/or when reporting will be provided,



Professional Services

Professional Services such as on-premises install and configure, integration, customization and management & maintenance that have been purchased or are included within the deal should each be detailed here, again with any relevant information pertaining to how the services should be used, and any important dates regarding when the services will commence and/or when reporting will be provided, what format those reports should be provided in, and who the reports should be provided to.

Information for Generic Onboarding: 8. Current Status and Future Deadlines

- All relevant dates relevant to the onboarding activities, including both overall start and completion dates for the entire onboarding process and any beginning and end dates for any specific onboarding phases if the onboarding process will be divided by region, by department, etc
- The current status of the overall project and any significant upcoming milestones



Current Status and Future Deadlines

It's always a good idea to document all relevant dates for an initiative. In this case, dates relevant to the onboarding activities should be recorded. This would include both overall start and completion dates for the entire onboarding process and any beginning and end dates for any specific onboarding phases, if the onboarding process will be divided by region, by department, by function, by seniority or in some other way.

In addition the current status of the overall project should be noted, along with any significant upcoming milestones, so that progress towards onboarding commencement can be monitored.

Information for Generic Onboarding: 9. Training and Certification Requirements

- Documentation of standard roles such as Administrator, Standard User, Power User, etc that are predetermined by the product or service vendor
- Customized roles that detail the exact features and functionality used when performing specific activities that the customer has defined (if required)



Training and Certification Requirements

This section is where training and certification needs for each user role can be documented. This is likely to include standard roles such as Administrator, Standard User, Power User, etc that are predetermined by the product or service vendor and customized roles that detail the exact features and functionality used by a person or group of people who will be performing specific activities that the customer has defined. For the former category, the training and certification requirements can simply be looked up in the vendors' reference materials, whereas for the latter either the CSM or a relevant subject matter expert will need to determine appropriate training and certification requirements on a case-by-case basis.

If the latter, customized roles information is being gathered, then arguably you would be moving into a "customized onboarding" type engagement, however for some companies, this information may be required even for their standard, generic onboarding offering if that complex nature of their solutions demands it.

Information for Generic Onboarding: 10. Training and Certification Plan

- Any planning activity that has already taken place either by the customer alone or with the involvement of the CSM's company, and any resultant outputs from that planning process, such as a high level training roadmap, a detailed project plan, and so on.
- These assets can then be referenced within the "Welcome Kit" information.



Training and Certification Plan

This section is to note any planning activity that has already taken place either by the customer alone or with the involvement of the CSM's company, and any resultant outputs from that planning process, such as a high level training roadmap, a detailed project plan, and so on. These assets can then be referenced within the "Welcome Kit" information.

Information for Generic Onboarding: 11. Training and Certification Availability

- A list of training (and if necessary certification) options for each user role.
- The CSM should make sure to clarify either themselves or with the help of a subject matter expert for which roles it is recommended (or even required) that users should be tested and/or certified before being given access to the product or service.



Training and Certification Availability

This is a list of what training (and if necessary what certification) options are available for each user role. For example there may be a choice between official classroom training offered by the vendor, other less expensive but potentially lower quality classroom training options from third parties and lower cost but potentially less effective online self-study training options. The CSM should make sure to clarify either themselves or with the help of a subject matter expert for which roles it is recommended (or even required) that users should be tested and/or certified before being given access to the product or service. Examples of this might be fork lift truck drivers in a distribution center, who may need to be given familiarity training, followed by testing on their ability to safely control a new model of forklift truck, or software security specialists who need to be trained and certified on a new corporate firewall or other software security system that is being deployed.

Information for Generic Onboarding: 12. Onboarding Assets

- A list of any assets such as brochures (hard and soft copy), welcome guides, user manuals, installation and configuration guides, and onboarding documentation templates that the CSM can either add directly into the “Welcome Kit” or point to the location of as additional reference information.



Onboarding Assets

This is where the CSM can list any assets such as brochures (hard and soft copy), welcome guides, user manuals, installation and configuration guides, and onboarding documentation templates that the CSM can either add directly into the “Welcome Kit” or point to the location of as additional reference information.

Information for Generic Onboarding: 13. Customer Success Management Discussions

- A note of any discussions that have already taken place with the customer, and any agreements or other outcomes from those conversations, in order to ensure that anything discussed or agreed within those conversations is taken into account when the “Welcome Kit” is assembled



Customer Success Management Discussions

This final section is available for CSMs to note the discussions that have already taken place with the customer regarding the ongoing assistance that can be offered to them for generating and measuring value from their purchase, and any agreements or other outcomes from those conversations, in order to ensure that anything discussed or agreed within those conversations is taken into account when the “Welcome Kit” is assembled.

Information for Customized Onboarding

- Customized onboarding generally needs more information to be researched, documented and analyzed than would be the case for a generic onboarding approach
- The CSM is encouraged to take the two template questionnaires as a start point and amend them as necessary to reflect their own company's needs



Being more complicated than generic onboarding, customized onboarding generally needs more information to be researched, documented and analyzed than would be the case for a generic onboarding approach. As such, I have created a second questionnaire which can be found on the third worksheet inside the Onboarding Requirements Capture workbook. Not all of these questions may be necessary in your own company's situation, some questions overlap on both sheets, and you may find you need to add further questions pertaining to specific customizations that your company offers. The CSM is therefore encouraged to take the template questionnaire as a start point but to amend it as necessary to reflect their own needs. One additional point to bear in mind is that these questions are mostly "additional to" rather than "instead of" the standard, generic set on the first worksheet, so the questions on the first worksheet should always be answered regardless of whether the engagement is for a generic or bespoke onboarding service. Again, CSMs might wish to amend this first list of questions contained in the first worksheet as well, to suit the specific needs of their own situation.

Information for Customized Onboarding

	A	B	C	D	E	F	G	H	I
1		Name	Description	Numbers	Locations	Communication Requirements	Training Requirements	Certification Requirements	Support Requirements
2	IG 1								
3	IG 2								
4	IG 3								
5	IG 4								
6	IG 5								
7	IG 6								
8	IG 7								
9	IG 8								
10	IG 9								
11	IG 10								
12									
13		Name	Onboarding Requirement Details						
14	IG 1								
15	IG 2								
16	IG 3								
17	IG 4								
18	IG 5								
19	IG 6								
20	IG 7								
21	IG 8								
22	IG 9								
23	IG 10								
24									
25		Name	Onboarding Materials & Inclusions						
26	IG 1								
27	IG 2								
28	IG 3								
29	IG 4								
30	IG 5								
31	IG 6								

The information you need to research can be documented using the Onboarding Requirements Capture template which can be found on worksheet 3 of the Customer_Onboarding_Templates workbook, and which provides a list of information pertaining to customized onboarding requirements.

Let's take a look at the information in this third worksheet, which is the worksheet pertaining to information required for customized onboarding:

Information for Customized Onboarding: 1. Solution End User Adoption Requirements

- An understanding of what end user adoption requirements or implications exist for each of the products and services within the solution
- This may be generic to the product or service or may vary based upon customer utilization
- Some of this information may already be documented in the generic adoption requirements worksheet



Solution End User Adoption Requirements

An understanding of what end user adoption requirements or implications exist for each of the products and services within the solution. Note – this may be generic to the product or service or may vary based upon customer utilization.

Note that some of this information and information on the following slides may already have been gathered and documented within the generic adoption requirements worksheet template, and if that is the case then you can either copy the information across or simply leave it blank here and refer back to the generic adoption worksheet for the information.

Information for Customized Onboarding: 2. User Groups

- The name of and other relevant details (including numbers and locations of users) for each user group that will be impacted by the initiative and which the customer wishes onboarding information to be provided for



User Groups

The name of and other relevant details (including numbers and locations of users) for each user group that will be impacted by the initiative and which the customer wishes onboarding information to be provided for.

Information for Customized Onboarding: 3. User Group Onboarding Requirements

- The specific onboarding needs of each group which the customer has requested to be managed
- This should include three KSA aspects:
 - Knowledge (understanding required to perform each task)
 - Skills (ability required to perform each task)
 - Attitude: (willingness of the user to perform the task)



User Group Onboarding Requirements

For each user group identified above, the specific onboarding needs of that group which the customer has requested to be managed within the onboarding materials need to be documented. This should include three aspects often abbreviated to KSA: Knowledge (the understanding required to perform each task), Skills (the ability required to perform each task) and Attitude: (the willingness of the user to perform each task).

Information for Customized Onboarding: 4. Onboarding Materials and Inclusions

- What format/s the onboarding information needs to be provided in for each user group and any information that the customer will be preparing that needs to be added to those materials



Onboarding Materials and Inclusions

What format/s the onboarding information needs to be provided in for each user group and any information that the customer will be preparing that needs to be added to those materials.

Information for Customized Onboarding: 5. Onboarding Delivery and Management Mechanisms

- What platforms will be used to deliver the information to each user group and who will be responsible for managing and maintain the process of delivering those materials and for measuring progress



Onboarding Delivery and Management Mechanisms

What platforms will be used to deliver the information to each user group and who will be responsible for managing and maintain the process of delivering those materials and for measuring progress.

Information for Customized Onboarding: 6. Onboarding Delivery Plan

- An understanding of how the onboarding will be rolled out to user groups, plus agreement on which components of the plan the CSM's company will be assisting with and the form of that assistance



Onboarding Delivery Plan

An understanding of how the onboarding will be rolled out to user groups (eg all at once, in phases, alone or together with other communications relating to other initiatives taking place simultaneously, etc) plus agreement on which components of the plan the CSM's company will be assisting with and the form of that assistance.

Information for Customized Onboarding

- There are less items to research but the amount and complexity of information returned for each item can be and likely will be much higher
- For complex onboarding requirements more information about which end users within the customer's organization will be using the solution components and in what way they will be using them is likely to be needed



As discussed in Chapter 6 of the book, do not be misled by the relatively small number of additional items within the second Onboarding Requirements Capture template. There are less items to research but the amount and complexity of information returned for each item can be and likely will be much higher. This is due partly to the fact that for complex onboarding requirements much more information about which end users within the customer's organization will be using the solution components and in what way they will be using them is likely to be needed. The CSM needs to be clear about how this information will be uncovered and provided, since it may be beyond their own scope and capabilities to do so themselves. As we discussed earlier, a lot of this sort of information is also a requirement for full adoption, which we will discuss in a lot more depth in the next module.

Managing the Onboarding Process

- In most circumstances, the customer's stakeholders should (and will) take the lead in disseminating onboarding information to their users
- The role of the CSM is to ensure that the right onboarding information assets get created in order for this to occur



Generally speaking, the customer's stakeholders should (and will) take the lead in disseminating onboarding information to their users, and it will be the CSM's job to make sure that the right onboarding information assets get created in order for them to be able to do this. There may be some liaison between internal, customer and third party teams and project management that the CSM needs to do, but it should be fairly straightforward to manage and control – so long of course as the requirements and activities were specified accurately and in sufficient detail at the onboarding service determination stage.

Managing the Onboarding Process

	A	B	C	D	E	F	G	H
	Task No.	Task Description	Time	Outputs	Customer Outcomes	Company Outcomes	Success Rating	Comments
1	Task 1							
2	Task 2							
3	Task 3							
4	Task 4							
5	Task 5							
6	Task 6							
7	Task 7							
8	Task 8							
9	Task 9							
10	Task 10							
11	Task 11							
12	Task 12							
13	Task 13							
14	Task 14							
15	Task 15							
16	Task 16							
17	Task 17							
18	Task 18							
19	Task 19							
20	Task 20							
21	Task 20							

The CSM will need to make sure they record what activity occurs and what were the activities' results. This might include the following:

Task: A brief description of the specific activity

Time: How many hours the CSM spent in performing the activity

Outputs: The results of performing the activity (may be a physical entity, but may also be for example an increase in knowledge)

Customer Outcomes: The benefits attained by the customer from the performance of the activity

Company Outcomes: The benefits attained by the CSM's company from the performance of the activity

Success Rating: A level from 0 to 5 that the CSM attributes to the activity to rate its overall success

Comments: Comments on any lessons learned that can be used in the performance of similar activities in the future

A template for documenting CSM onboarding activity is provided in the fourth worksheet of the Onboarding Requirements Capture template.

Managing the Onboarding Process

- The CSM should provide progress reports to the customer
- This report may be formal (ie written up as a printed report) or informal (for example the information might be included within an email or conversation)
- The report can include documentation for activity, outputs and outcomes attained since the previous milestone



In addition to internal documentation, it is also good practice for the CSM to provide progress reports to the customer. This report may be formal (ie written up as a printed report) or informal (for example the information might be included within an email or conversation) depending upon circumstances. Commonly the customer will need regular informal updates and more formal reports can then be created when each major milestone within the overall engagement is reached. The report can then include documentation for all activity, outputs and outcomes attained since the previous milestone. The report will be simple for the CSM to create since they can refer back to their own internal activity documentation to remind themselves as to what has happened and to copy and paste information as necessary.

Developing the Right Onboarding Services

- There is a sliding scale for onboarding services that runs from completely generic at one end to completely bespoke at the other end, and most onboarding engagements fall into some shade of gray in between
- Different companies will have different takes on what to include within their generic onboarding offering, based upon their products and services and customers



Both the book and this training course explain onboarding in terms of two distinct types – one called “generic” and the other called “customized” from which you or the customer selects as if choosing between black or white. In reality however it’s far more like a sliding scale that runs from completely generic at one end to completely bespoke at the other end, with most onboarding engagements falling into some shade of gray in between.

Different companies will have different takes on what to include within their generic onboarding offering, with some companies opting for the bare minimum and expecting their customers to pay a professional services fee for anything over and above this very limited “no charges” offering, whereas other companies might go for an all-in approach that delivers maximum onboarding value to the customer – perhaps as a way of differentiating their products and services from those of their competitors in order to create an attractive customer value proposition that wins them more business. There is no simple answer as to what is right or wrong, and one size does not fit all. Each company’s senior decision makers must determine the onboarding strategy that best fits their company’s solutions, customers, brand and capabilities.

Developing the Right Onboarding Services

- Customized or bespoke onboarding is becoming more common as a customer-led requirement
- Market research into the needs and desires of a company's customers, is a sensible start point for determining types and levels of onboarding services to offer
- A third party professional services partner could be used deliver customized onboarding services



With that said, customized or bespoke onboarding is becoming more common as a requirement that customers look for when deciding which supplier to place their business with, since customers increasingly recognize the importance to them of onboarding as an essential element in value generation. One suggestion then, would be to perform some market research into the needs and desires of your company's customers, as a start point for determining what types and levels of onboarding services to offer.

If it appears that customized onboarding is required by your customers, but if your company is not in the position to deliver this customized onboarding service – for example perhaps because of lack of professional services expertise), the company could look for a professional services partner to offload the delivery of the service to. This would enable you to deliver the fully featured service that customers desire straight away without too much cost or effort in recruiting new staff, designing the service, and so on, although of course the majority or even all of the professional services fees relating to onboarding will be lost to the partner who will be providing the service, and in addition to lost revenue opportunities there may potentially be issues regarding control of the quality and consistency of the services delivery that mean that it may be better to look at ways to provide these services internally at least in the medium to long term, rather than going elsewhere for them.

Developing the Right Onboarding Services

- There is no universal “right” or “wrong” way to deliver onboarding services, as it depends upon the specific needs of a company’s customers, and on the company’s own business model
- It may make sense only to offer generic onboarding, only to offer customized onboarding or to provide customers with a choice of either model



Again, I want to emphasize that it is not a case of “right or wrong” or of one service being better than the other. There are sound business reasons why a simpler, more generic onboarding service might be selected as the right one to offer customers, just as there are equally sound business reasons why a more customized approach might be determined as the right offering. It may also be the case that both are offered, where the basic service comes packaged within the purchase price of the solution itself and the customized service is chargeable as an additional professional services fee.

Developing the Right Onboarding Services



Just like Goldilocks with her porridge in the story of *Goldilocks and the Three Bears*, customers find too much information (and especially too much badly organized information) or too little information to be equally frustrating to them. What the customer wants is firstly the right amount of information and secondly for that information to be accurate, up-to-date, simple to understand and useful and relevant to their needs. Care should therefore be taken to ensure that the “Welcome Kit” or other assemblage of information that is handed to the customer during the onboarding process meets these criteria.

Developing the Right Onboarding Services

- Thought should be given to what types of information to include and exclude, and how to format and present the information in a consistent and clear way
- It may be a good idea to invite a number of stakeholders to attend a planning workshop to determine onboarding welcome kit needs, and/or to give feedback on prototype kits



Again, it's not possible for me to say what amounts or types of information should be included within *your* company's Welcome Kits. What I can say is that thought should be given to what types of information to include and exclude for each product, service and solution, and how to format and present the information in a consistent and clear way to make it easy for customers to navigate through to find the specific data they are looking for. One good way of proceeding might be to invite a number of stakeholders from friendly customers with whom your organization has developed good working relationships to attend a planning workshop to determine onboarding welcome kit needs, and/or to give feedback on prototype kits once they've been produced – perhaps in return for a favour back, such as a free upgrade, or a discount off the next service renewal. This could be money well spent, since anything that reduces customer frustrations and enhances the overall customer experience will be very likely to pay dividends in the long term.



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