Customer Kickoff Call Script

First it's important to know this is meant to be a training tool and not read word-for-word on your kickoff calls. Take this script and make it your own, then work down to a bulleted list to use as a tool on your calls.

CSM Introduction:

Hey {Customer Name}, it's great to finally meet you! Thanks for taking the time to chat with us today. You have [CSM's name] here. [Insert rapport building – i.e. their location, news about the company, etc. DO NOT TALK ABOUT THE WEATHER].

Are we waiting on anyone else from your side to join?

Okay – great. Welcome to onboarding! As I mentioned in my last email I'll be your primary point of contact here at {Your Company Name}. I also have {Onboarding Specialist} on the call - who will be our Onboarding Specialist that will help us get up and running as quickly and efficiently as possible.

[Onboarding Specialist jumps in and introduces him/herself.]

If you have any questions at all throughout this process don't hesitate to reach out to both of us. Both of our contact information is on the kickoff email that we sent to you and we'll be following up after this call as well.

Also, I invited you to Onboard.io [it looks like you were able to get the pre-kickoff tasks completed OR it doesn't look like you were able to get the pre-kickoff tasks completed, did you have any questions about that?]

Before we kickoff onboarding today, I wanted to set a quick agenda:

- First I just want to confirm some information, then
- Then we'll go over our 3 phase onboarding process, and
- We'll leave some time to answer any questions you might have.

If that sounds good, I'll go ahead and jump right in:

Customer Kickoff Call Script: (Cont'd)

To get everyone on the same level playing field: [You or the Customer Contact that made the purchase] is trying to [...insert what you know about their use case]. Did I miss anything there?

[Discuss in detail why they purchased your product and what they're trying to solve. One question you should always ask: When we're looking back at {your solution} a year from now, how will you determine if it was a success?]

Awesome. As we nail down those KPIs and success criteria, we'll be reviewing periodically.

I'm going to go ahead and turn it over to {Onboarding Specialists Name}.

Onboarding Specialist Takes Over:

Great! Thanks {CSM Name}, let's start by covering the onboarding process at a high level to give you an idea of where we are and where we'll be going.

[pull up that visual onboarding slide]

We have a three-phase Onboarding process.

The first phase starts today with the Introduction & Kickoff call. Today's call is really all about getting introduced and gaining alignment on the configuration phase coming next.

Phase two is all about configuration and integration. For this call, we'll need someone from your team who will be doing [define the tasks they will be completing during onboarding]. Who from your team will be doing that piece?

The last phase will be reviewing everything that we've setup and going live!

What questions can I answer about that process?

Customer Kickoff Call Script (Cont'd)

[Answer any high level questions about the Onboarding process. If they get in the weeds, let them know we'll work through the details as we get to them. Remember you're the onboarding professional - you've done this more than anyone - control the process.]

Alright, great. Let's go ahead and dive in. From what I understand, [confirm everything you've learned from the handoff process and the preparedness plan. Confirm use case information, key stakeholders, goals, and ideal go live timeline].

Highlights:

- Use the time at the beginning of the call to establish that you have researched their company and they're not being "passed off", they're being handed off.
- Reiterate that you're going to be their primary point of contact and let them know who the other person is on the call (the Onboarding Specialist).
- Confirm they have received the invite to Onboard.io and they don't have any questions about how it works.
- Set an agenda at the beginning of every call.
- Ensure everyone on the call understands the use case. This is the time to work through any details that might not be fully understood by everyone.
- Get to a solid answer around the metrics used to measure success. Make sure you document this in your CRM, so you can always reference back to this conversation.
- Present the visual onboarding process early and often to keep everyone on track.
- Always ask "what questions do you have" and not "do you have any questions", this will keep them engaged.
- Never forget that you know the best way to onboard customers. Stay in control of the process to prevent mistakes.
- Ensure you get all the information needed on this call to pull the client to phase two. When you miss something on this call, always follow up as soon as possible to prevent time delays.