Visual Onboarding Process

A visual onboarding process is a great way to show your client where they have been, where they are now, and where they're going. Use this visual on the first call and every call after. Also, this is a great asset for your Sales Team to use when explaining onboarding to their prospects.

Phase 1: Intro & Kickoff

Introductions

Confirm Information

Set Expectations

Day 1-3

Phase 2: Configuration & Integration

Complete Config work

Start Integrations

Go-Live Planning

Day 3-5

Phase 3: Test & Go Live

Review Set Up

Final Testing

Go Live!

Post-Launch Planning

Day 5+