

Introducing The Customer Onboarding Maturity Model: An Easy Way To Measure & Up Your Onboarding Game

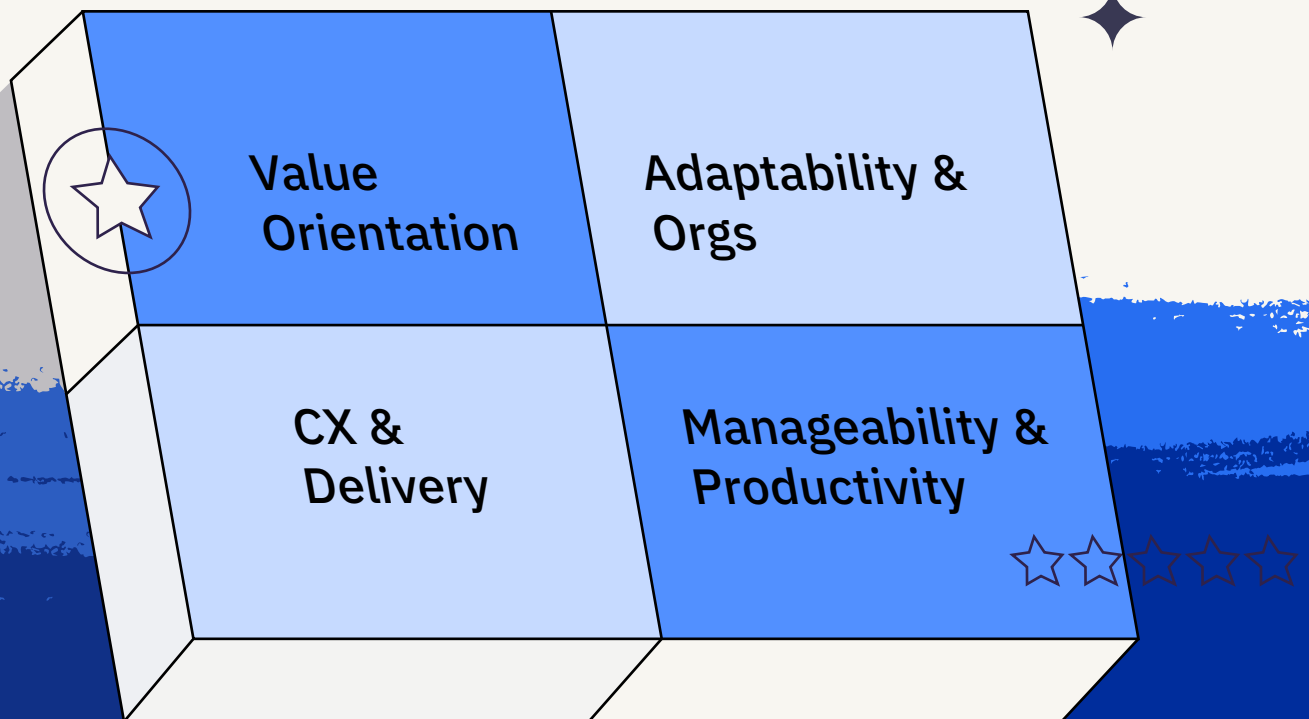


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A customer onboarding project can feel a lot like a game of Jenga with multiple players, where if one person makes the wrong move everything can fall apart. You have to make sure you don't topple the entire plan when working on a specific activity. You're constantly worrying about how best to make it smooth for your customer.

Or your optimization efforts are giving lesser and lesser returns with every project.

So how do you get better at the game and increase your chances of desirable outcomes? Well, we have a maturity model that can help you with just that.

An onboarding maturity model helps you understand the areas in your onboarding methodology that require improvement. It also enables you to prioritize specific areas that you want to improve based on your company's maturity level.

Based on our own experience having worked in the onboarding space and our conversations with peers in the onboarding and implementation area, here's v0 of our Customer Onboarding Maturity Model:

Onboarding Maturity Model

Value Orientation	Score (1-5)	CX & Delivery	Score (1-5)	Adaptability & Orgs	Score (1-5)	Manageability & Productivity	Score (1-5)
Are all your customer-facing teams able to articulate value delivered?		Do you have a well defined onboarding plan and live status that is shared with customers?		Do you have adaptive methodologies based on criteria like (a) customer maturity or (b) whether they are moving from a competitor vs buying for the first time or (c) mid market vs enterprise customers?		Do you measure and benchmark TTV, CSAT, feedback, and time taken per milestone by team, and by CSM?	
Do you have 3-4 key metrics that determine value creation for the customer?		Do you have a process of expectation setting and sign-offs with the customer POC?		Do you have fully fleshed out implementation plans and doc templates for consistent execution?		Do you have tools to create playbooks, templates and to ensure/audit compliance with them?	
Do you measure and benchmark time-to-value?		Are there well defined customer communication protocols and escalation rules outlined?		Do you have dedicated teams focused on customer onboarding and implementation? (Do you measure them on onboarding metrics?)		Do you have processes for identifying areas of improvement, and making regular updates to your methodology?	
Do you have targets of value delivered in 30-60-90 days?		Do you measure CSAT score, timelines, and delays / deviations for key milestones delivered?		Do you have services offerings to bridge any gaps in customer maturity?		Do you have an automation strategy for key elements of the onboarding journey like data onboarding, training, integrations, configuration?	
Do you have value-based goal sign-off with your customers?		Do you measure customer effort score in the implementation journey?		Do you have implementation partners to scale your implementations as the business grows?		Do you have automation around status updates, follow ups, reminders to hold customers and team members accountable with ease?	
Total		Total		Total		Total	

5-10 - Needs immediate attention | 11-18 - Room for improvement | 19-25 - Excellent

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Before we get into the details, some points to note:

- ◆ This model is for medium to high touch onboarding projects that involve at least a three-week project duration to deliver value. You can borrow our ideas on the dimensions and create your own model if you want to adapt the it for simpler/self-serve SMB onboarding.
- ◆ To keep things simple, we've started with restricting the model to four dimensions. To get to four, we had to combine some dimensions which may eventually deserve their own dedicated space in the future.
- ◆ We haven't added core Professional Services elements like utilization rate, project profitability, etc. at this time as we focused on a model for CS teams that also handle customer onboarding. We may create a version for professional services - collaborators welcome! Write to us at sri@rocketlane.com or reach us on the [Preflight community](#).
- ◆ Keep in mind the context and maturity of your company as you look at the model. Onboarding maturity should be in line with your company's growth. So a low score on a dimension isn't always bad - it might be right for your stage.

Dimension 1: Value Orientation

This dimension helps you understand how value-focused you are as a company. For SaaS businesses, it is essential that the customer gets to value realization faster. The more customers who can see value quickly, the lesser the frustrations and churn and for your business. Ultimately, delivering value is the most important thing to do to increase your NRR.

Are teams able to articulate value?

For this indicator, analyze whether everyone on your team understands what value you are trying to unlock for the customer. This gives you a fair idea of how value-oriented your CS org is and where you need to intervene and help people reorient.

Do you measure ROI/value?

Are you able to measure the ROI and value? Are the metrics you are looking at aligning with the ROI you are measuring when delivering value to your customer? To measure your ROI, you need to conduct pre-implementation and post-implementation measurements in the customer org to showcase the value you will deliver. E.g., if you are implementing your chatbot for a customer who has switched from a competitor, you need to showcase how your product is doing better than the competitor's. You need to spend some effort in benchmarking before showcasing your ROI, as the latter will depend on the former. Without that benchmarking, showcasing to your customer what value you have added will be difficult and hypothetical.

Dimension 2: CX & Delivery

Onboarding plan and live status

Check whether you have a robust onboarding plan and live status that can be

showcased to the customer at every stage in the journey. Knowing you have a solid plan and that they can access the project status at any time during the onboarding journey will win the customer's confidence.

Expectation setting and signoff

Setting the right expectations with your customer and getting crucial sign-offs from them to ensure that teams are aligned and don't get surprised should be a part of your onboarding process. You also need to have communication protocols defined to ensure that stakeholders know when to escalate and whom to escalate to; this way, everyone will know exactly what to do when faced with issues. This is an indicator of how mature your onboarding process is. The more mature your strategy, the smoother the experience is for the customer.

Measure CSAT score, timelines, and delays

How often your onboarding projects are delayed, what goals take longer than estimated to reach, and the CSAT scores indicate where your onboarding process needs improvement.

Customer effort score

Does the onboarding process wear your customer down? Does it seem like it is asking a lot from them? How much heavy lifting do they have to do? This will help you know where you need to make things easier for your customers in the onboarding journey.

Dimension 3: Adaptability & Organization

Adaptive methodologies

Do you change your onboarding process and plans according to the maturity of your customer or their industry? This influences your strategy, your onboarding goals, and the

people from your org who will engage. E.g., Suppose a customer has never used a product like yours before. In that case, that will need specific team members of yours who are good at implementing the product for such customers, and the goals would also be different from that of a customer who is switching from a competitor.

Implementation plans and doc templates

Are you able to achieve consistency through your systems and processes? E.g. by having templates for your projects and onboarding documents, you can achieve consistency and a higher rate of adherence to the process.

Dedicated onboarding team

Do you have a team dedicated to onboarding customers? Or does the same team involved in all post-sales activities handle onboarding too?

Services offerings based on customer maturity

Not all customers are equal. Some of them may need you to fill specific gaps for them before you begin onboarding them. Otherwise, they don't fall under your ICP anymore.

Implementation partners

As you grow and expand, you may want to start looking at external partners to start implementing on your behalf instead of just adding more people to your implementation team.

Dimension 4: Manageability & Productivity

Metrics by milestones, team, region

Are you able to capture metrics? Are you able to look at TTV, CSAT, time taken per milestone, and slice your data based on region, team, etc.? This would give you a clear picture of what the best effort looks like and help you create a benchmark internally for your onboarding function.

Audit compliance to playbooks

Do you have ways to audit compliance with your playbooks and the timelines and processes around them? Are you able to check if your team is adhering to best practices?

Continuous improvement/iteration on methodology

Is there a process in place to measure success regularly, say every quarter or so? Is there a conscious effort or program geared towards improving your onboarding methodology?

Automation strategy

There are many areas in your onboarding journey where you can automate activities that are being done manually, such as enabling certain features and configurations. Automating them impacts CES and helps you scale faster.

Project management automation

Can activities that are being done manually, such as follow-ups and status updates, be automated? This frees up time for the onboarding manager, and they can focus on process improvements.

Model and scoring

Use the following scoring to figure out where you stand.

- ◆ **5-10** - Needs immediate attention
- ◆ **11-18** - Room for improvement
- ◆ **19-25** - Excellent

There is no universal ideal or 'right' score for your onboarding process. If you score low on a dimension, it is simply a cue for you to reflect upon whether that works for your

company or if it is something to focus on. If you have multiple areas with low scores and are looking to improve them, you could take one theme, say, every quarter and work towards improving it.

Need help applying this maturity model for your onboarding methodology? Write to sri@rocketlane.com, and we will get in touch with you.

