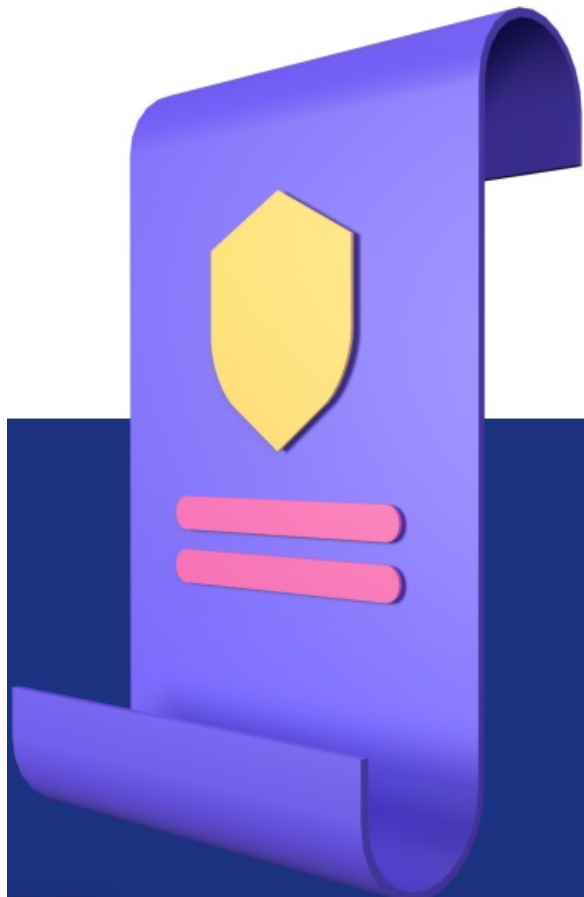


# CogniSaaS 2024 Expert Predictions Best Practices User Manual

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CogniSaaS 2024 Expert Predictions Best Practices



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## Introduction

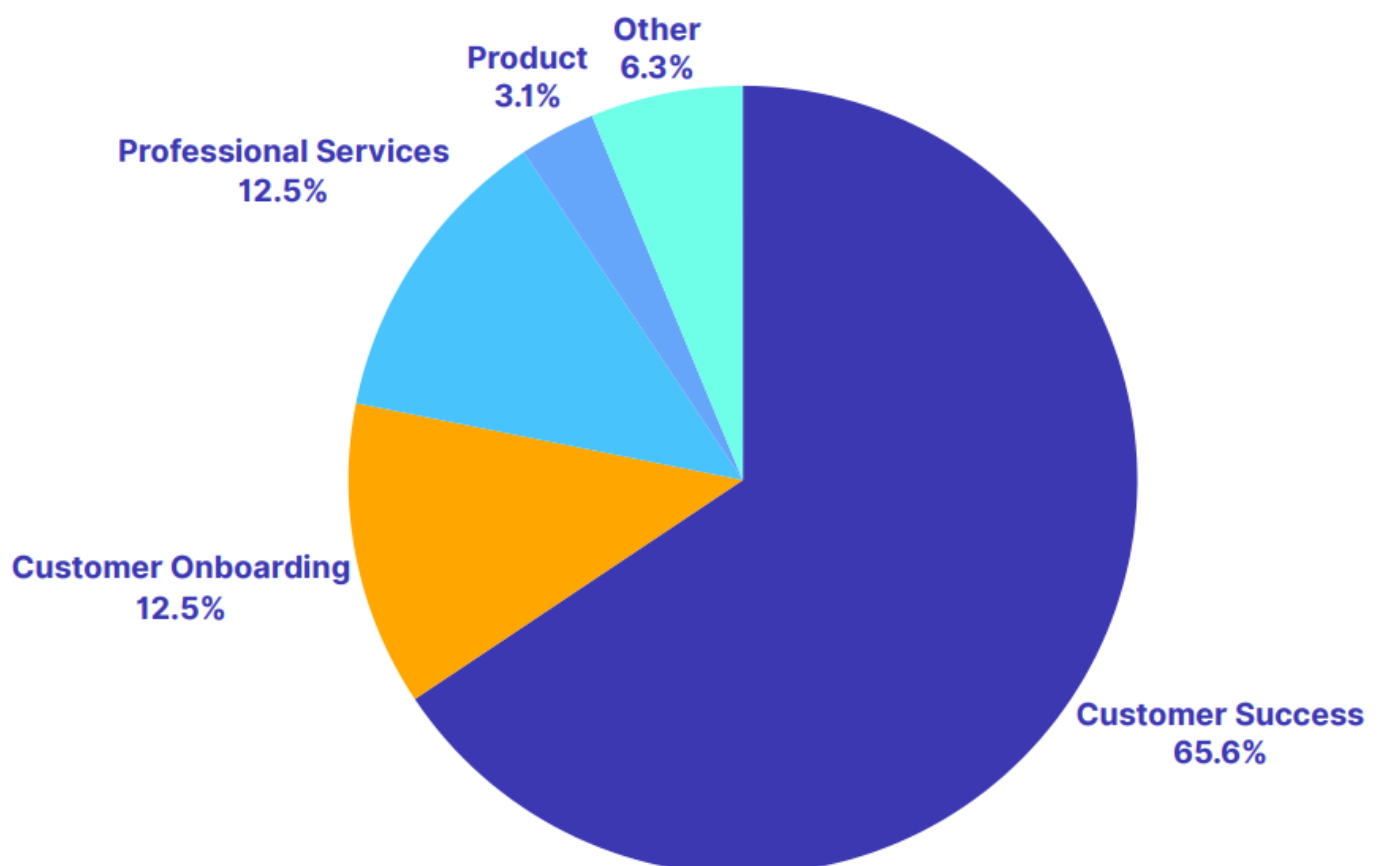
With economic turmoil on the horizon, late 2023 and the beginning of 2024 have seen many layoffs among the customer success fraternity. Reduced resources force remaining CS personnel to juggle more with less, potentially sacrificing the quality of onboarding experiences.

To extract rich insights into current challenges, progress, and future priorities for improving customer onboarding outcomes, we conducted an extensive survey of customer-facing professionals engaged in onboarding operations today.

By detailing key themes around centralization, automation, and cross-team synchronization, this analysis will spotlight crucial building blocks, that organizational leaders should prioritize constructing to accelerate onboarding velocity, enhance customer lifetime value, and fuel scalable expansion in 2024.

The insights uncovered underscore essential investments, process evolutions, and platform capabilities needed to shift onboarding – transitioning the function from a cost center to a profit center accelerating speed to initial value realization and next-best-action offers.

## The Respondents



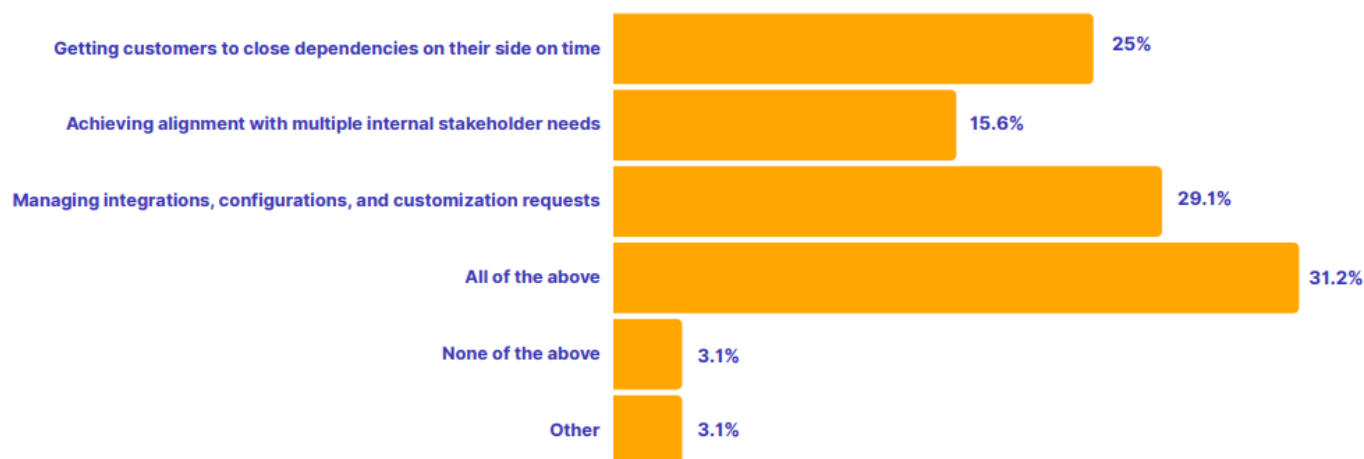
The responses provide us with valuable inputs directly from the critical players involved in customer onboarding

delivery day-to-day. With 66% of responses from Customer Success Managers used to shepherd onboarding progress daily, we are getting crucial insights on key pain points. Additionally, 13% came directly from the onboarding function and another 13% from implementation/services – showing we have good inputs into the complications happening technically/configuration-wise as well as pre and post-sale. 10% of responses were from the Product team and other teams not actively embedded in onboarding operations but play an important supporting role in delivering faster time-to-value.



## The Challenges

What is the biggest onboarding challenge cited when getting enterprise customers live on time?

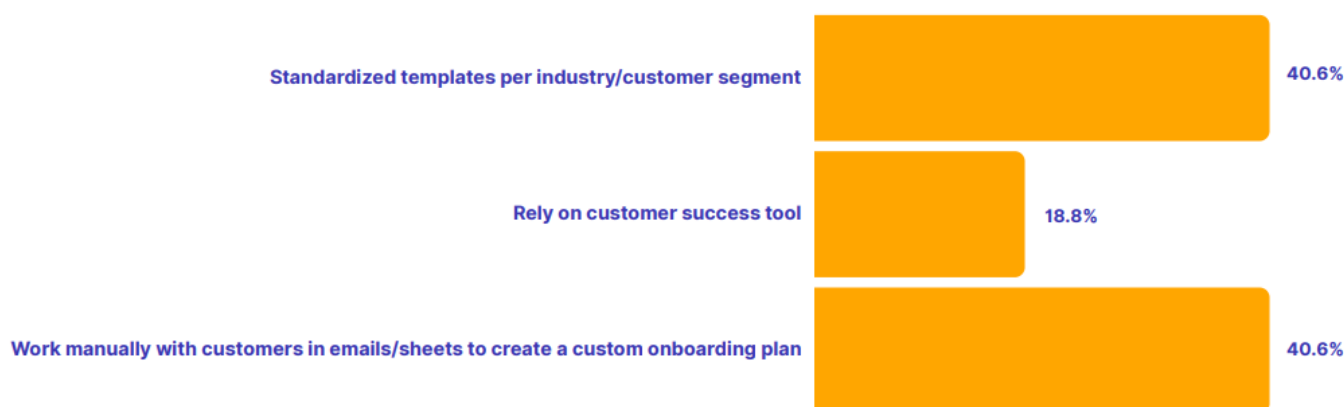


Enterprise customer onboarding requires careful planning, proactive communication, and addressing various challenges.

The biggest challenge is a complex interplay of multiple factors (31.2%).

Other challenges include managing integrations (25%), getting customer buy-in (21.9%), and aligning stakeholders (15.6%).

### How are you currently handling the complexity of customizing onboarding plans for customers?



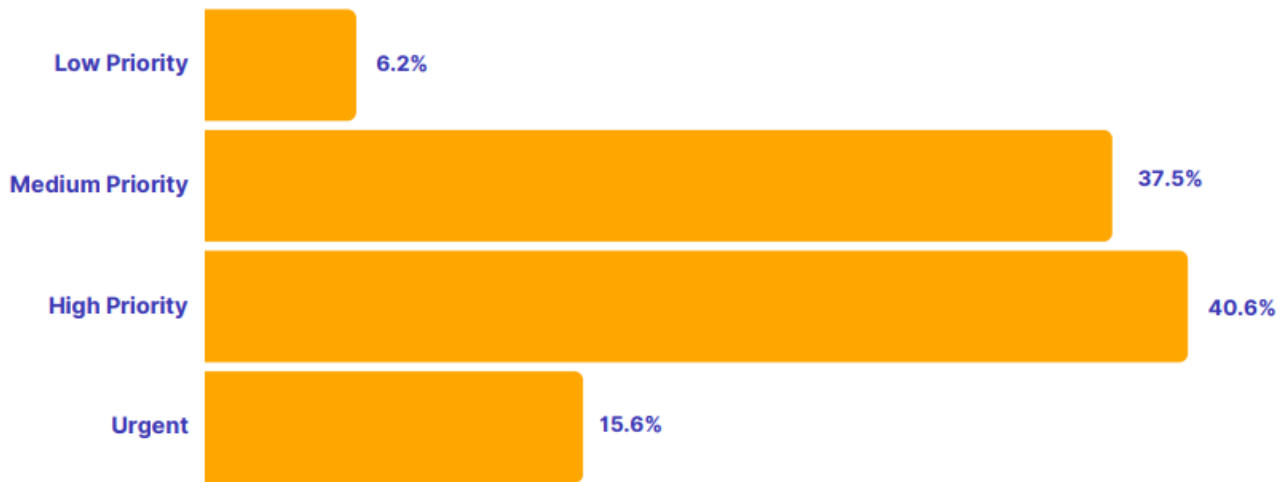
### Onboarding customization methods for enterprise customers:

- Manual in emails/sheets (40.6%): Flexible but time-consuming and prone to errors.
- Standardized templates (40.6%): Faster and efficient, but limited for unique needs.
- Customer success tools (18.8%): Underutilized despite the potential for automation and consistency.

Businesses prioritize flexibility over efficiency in customization, highlighting a need for improved automation tools.

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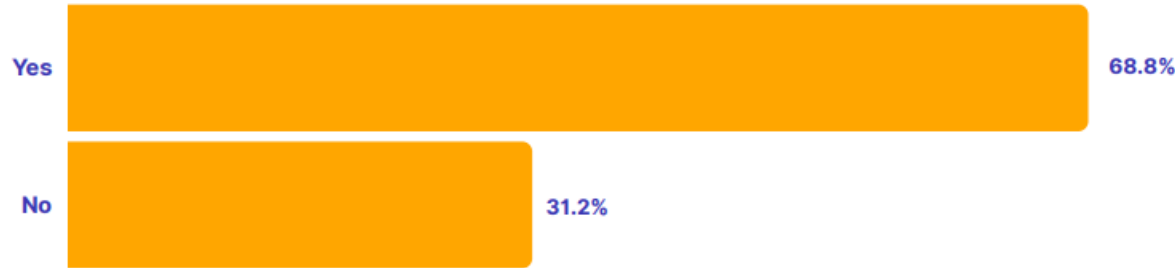
### How important it is for you to automate the manual collaboration with customers on tracking external dependencies and sharing project status?



The survey reveals a major pain point for businesses: managing dependencies and project status updates with customers remains heavily manual. A whopping 62% of respondents consider automating this collaboration either “High Priority” or “Urgent.”

This likely stems from scattered systems, communication hurdles, and time-consuming processes. Automation is seen as a key to improving efficiency, communication, and customer satisfaction.

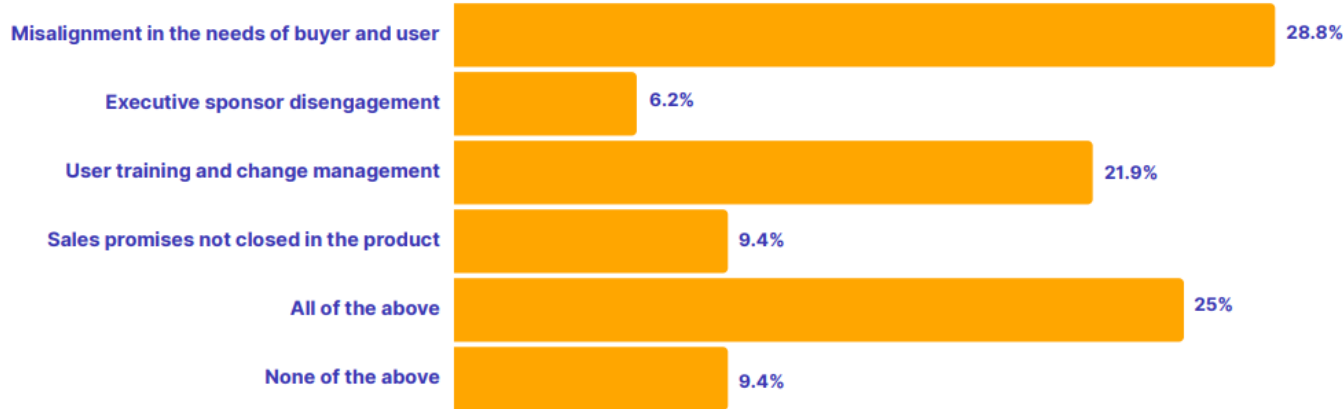
**Are you using any customer onboarding tool in your current role?**



The survey results are split unevenly, with 68% of respondents saying they use a customer onboarding tool and 32% saying they do not.

This suggests that while customer onboarding tools are becoming increasingly popular, there is still a significant portion of professionals who rely on manual methods or other solutions.

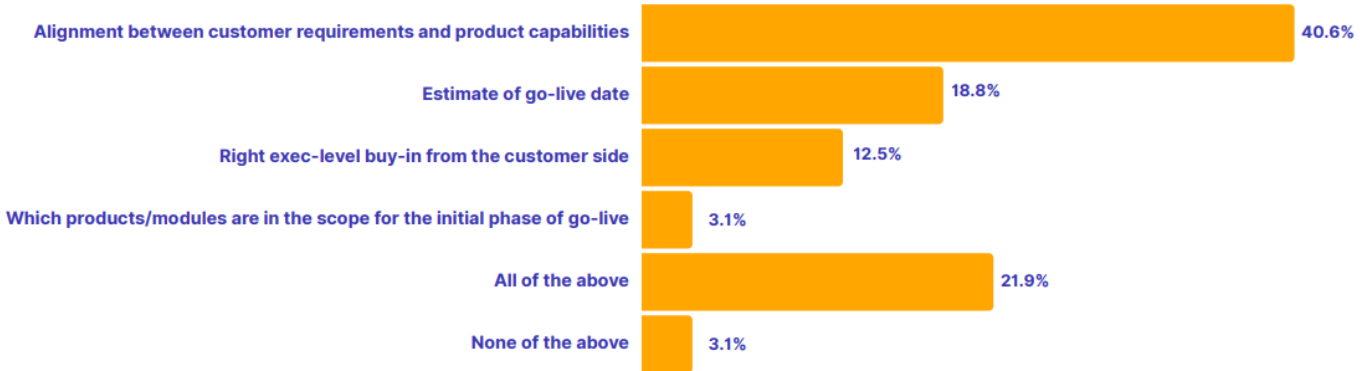
**What are the biggest challenges during customer onboarding and adoption?**



The most common challenge faced was managing buyer and user needs (28.1%). This highlights the importance of ensuring that products are well-aligned with user needs and expectations.

Other challenges included user training, change management, unmet sales promises, and executive disengagement.

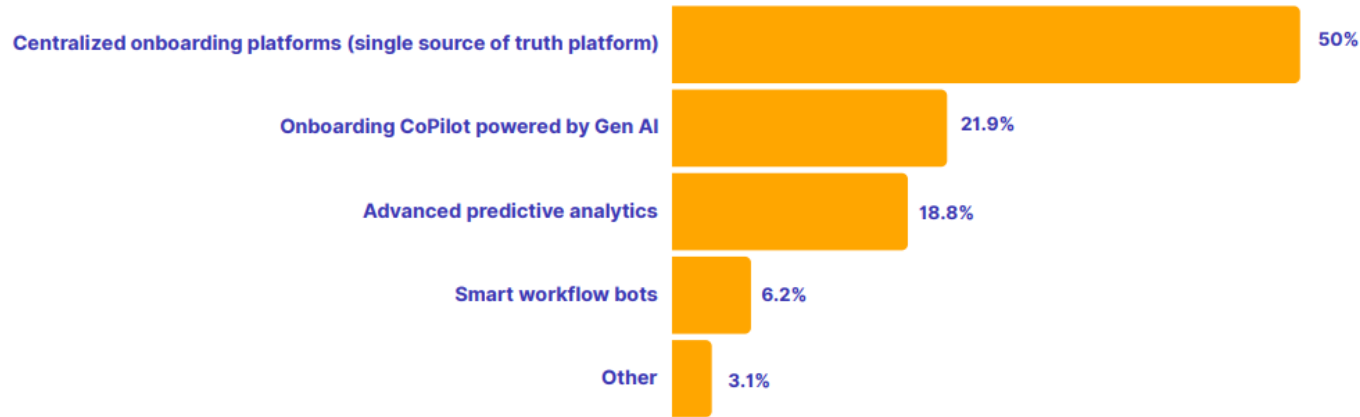
What are the top areas of mismatched expectations between sales promises and reality in customer onboarding?



The survey highlights the importance of aligning expectations with reality during customer onboarding. Here are the key challenges to address:

- Mismatched needs and capabilities (40.6%): Ensure clear communication and understanding of customer requirements early on.
- Inaccurate go-live dates (18.8%): Set realistic expectations and timelines to avoid delays.
- Lack of executive buy-in (12.5%): Secure stakeholder support for a smooth onboarding process.

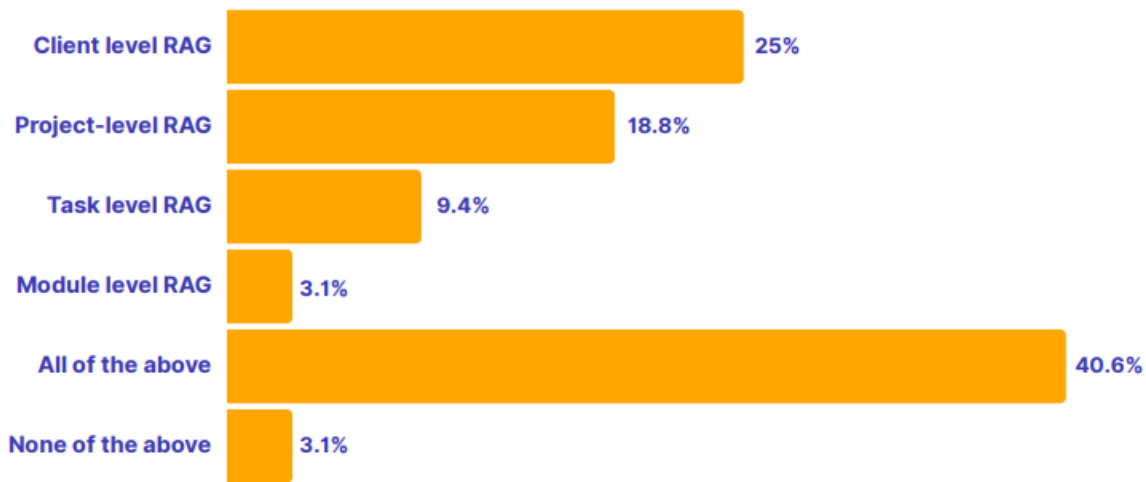
What new capabilities do you wish for in the customer onboarding tools to meet your goals in 2024?



Businesses are seeking centralization, automation, and intelligence in their customer onboarding tools for 2024.

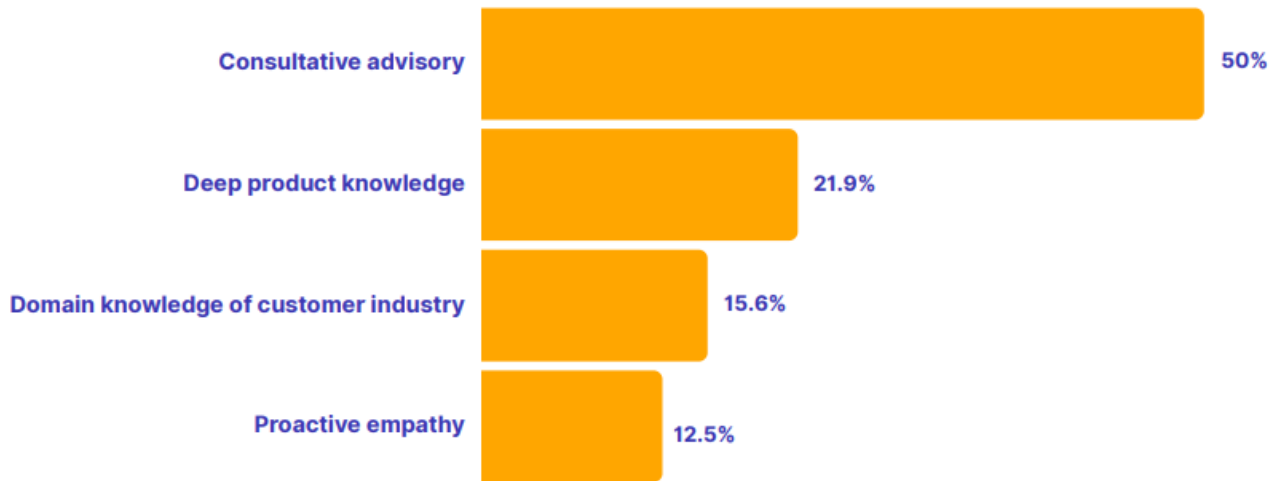
- Top priority: Centralized platforms (50%) to consolidate data and processes.
- Growing interest: AI-powered “Onboarding Co Pilot” (21.9%) for automated assistance. This highlights the desire for streamlined, data-driven, and intelligent onboarding solutions.

Which RAG status is useful during customer onboarding?



While there’s no single most popular RAG status for customer onboarding, the survey reveals a strong preference for utilizing them at multiple levels. Over 40% of respondents favored “All of the above, ” highlighting the value of comprehensive visibility across various aspects like clients, projects, tasks, and modules. This multi-layered approach allows for a nuanced understanding of potential risks and facilitates effective management throughout the onboarding journey.

**Which is the most critical skill for implementation managers to be successful in 2024?**



The chart shows that the most critical skill for implementation managers in 2024 is consultative advisory, with 50% of respondents selecting it. This suggests that the ability to provide advice and support to clients is essential for success in this role.

The other answer choices received fewer votes:

- Deep product knowledge: 21.9%
- Domain knowledge of customer industry: 15.6%
- Proactive empathy: 12.5%

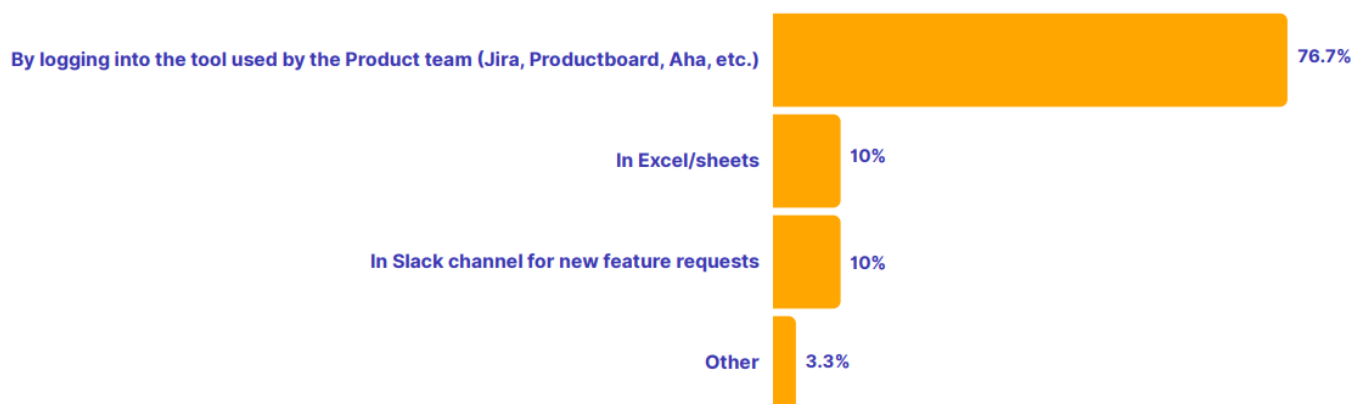
Overall, the chart shows that implementation managers need a variety of skills to be successful, but the most important skill is consultative advisory.

**Do you get new feature requests from customers that are blockers for the go-live, retention, or expansion?**



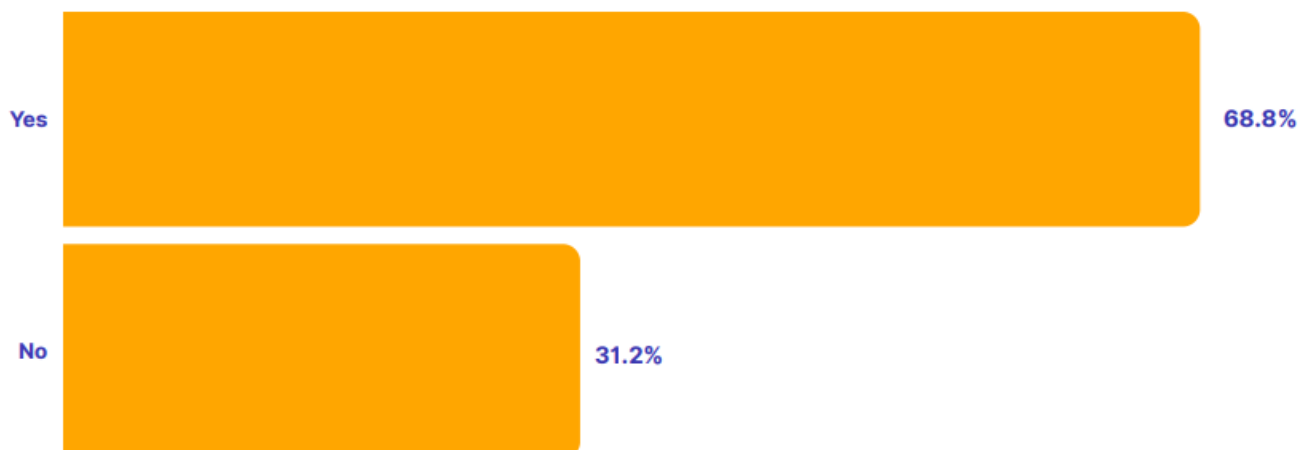
A staggering 93.8% of respondents reported that these requests impede progress on crucial areas like go-live dates, customer retention, and expansion efforts. This highlights the potential conflict between fulfilling customer desires and achieving core business objectives. Careful evaluation and prioritization of feature requests are crucial to navigate this challenge effectively.

**How does the Implementation team communicate the new feature requests and the associated context (customer, use case/module, due date, revenue impact, etc.) to the Product team for prioritization?**



Teams primarily rely on standardized tools like Jira or Product board (76.7%) to communicate new feature requests and context to the product team for prioritization. These tools allow for clear labeling, custom fields, and organized communication. Less common methods include spreadsheets (10%) and Slack channels (10%), which may be less suitable for complex requests or detailed context.

**Do you have multiple modules or products that need to be tracked during implementation?**



The graph about a survey question asking if respondents have multiple modules or products that need to be tracked during implementation.



The survey results show that 68.8% of the respondents answered yes, and 31.2% answered no.

## Long Story Short

### Onboarding Blues: Balancing Customization and Automation

Onboarding processes are caught in a tug-of-war between standardization and personalization. While 41% leverage templates for some automation, many still get bogged down in manual efforts like spreadsheets. This screams for better tools like low-code options to bridge the gap.

Clients are yearning for centralized platforms that offer a single source of truth. Imagine struggling with fragmented tools and disconnected data – that's the reality for many. This fragmentation not only slows everything down but also opens the door to inconsistencies and mismatched priorities. A unified platform with integrated systems and standardized tracking would be a game-changer.

Speaking of efficiency, automating collaboration tracking is a top priority. Think of all the time wasted on manual coordination. Investing in tools or processes to streamline this can free up valuable resources.

But clients don't just want efficiency, they want simplicity and a unified view. Consolidated platforms with AI, bots, and advanced analytics are like the dream team for modern onboarding. Imagine the power of intelligent automation and insights at your fingertips!

However, there's a disconnect between what's promised and what's delivered. Misaligned product capabilities and inaccurate go-live estimates are major turn-offs for clients. Managing expectations by being upfront about features and timelines is key to building trust and satisfaction.

### TL-DR

- Offer both templates and flexibility: Help clients customize while reducing manual effort.
- Unify your systems: Create a single source of truth for data and tracking.
- Automate collaboration: Streamline coordination and save time.
- Go beyond basic features: Offer advanced options like AI and analytics.
- Be transparent and realistic: Set accurate expectations to build trust.
- By addressing these challenges, you can transform onboarding from a frustrating experience to a smooth and efficient journey for both you and your clients.

## The Way Ahead

**Based on the survey conducted, we have nailed down the best practices for 2024 and way ahead.**

### 1. Templatize:

Gone are the days of spreadsheet nightmares. Utilize pre-built templates to automate repetitive tasks, but remember, customization is key. Embrace low-code tools that empower personalization without complex coding, ensuring each client feels valued while maintaining process flow.

### 2. One Platform to Rule Them All:

Clients crave a unified platform, a single source of truth where data and tools are seamlessly integrated. Advocate for systems integration, standardized reporting, and a platform that harmonizes all aspects of the onboarding journey. This saves time, reduces client frustration, and eliminates data silos.

### 3. Automate the Collaboration:

Collaboration is crucial, but manual tracking?

No bueno!

Leverage automation tools to streamline communication and track progress effortlessly. Imagine happy teams and clients, free from the chaos of endless coordination emails.

#### 4. Embrace the AI:

Clients expect a modern, intelligent experience. Integrate AI, bots, and advanced analytics into your platform to offer personalized recommendations and real-time insights. Remember, efficiency and intelligence go hand-in-hand for a truly magical onboarding experience.

#### 5. Promises VS Reality

Setting unrealistic expectations sets everyone up for disappointment. Be transparent about product capabilities and go-live timelines. Underestimating complexity leads to frustrated clients and stressed out specialists. Manage expectations clearly to avoid unnecessary drama.


## Customer Support

[www.cognisaas.com](http://www.cognisaas.com)

# CogniSaaS

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## Documents / Resources

	<p><a href="#">CogniSaaS 2024 Expert Predictions Best Practices</a> [pdf] User Manual</p> <p>2024 Expert Predictions Best Practices, 2024, Expert Predictions Best Practices, Predictions Best Practices, Best Practices, Practices</p>
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## References

- [CS Customer Onboarding Platform | CogniSaaS](#)
- [User Manual](#)

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