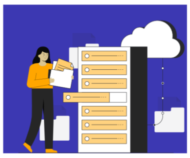
CogniSaaS-Customer-Onboarding-Platform-Platforms-Software



CogniSaaS Customer Onboarding Platform Platforms Software User Guide

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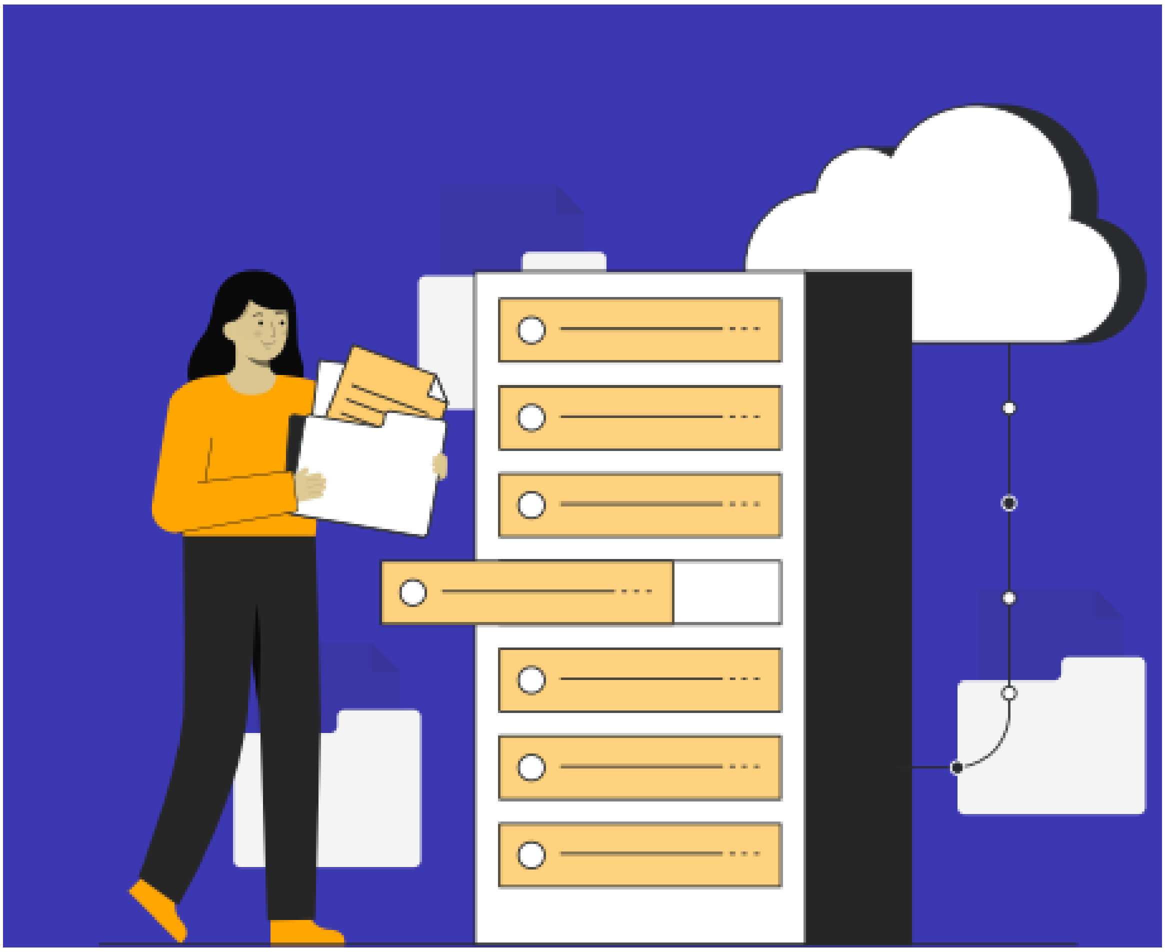


fixations:

- **Product Name**: Customer Onboarding and Implementation Software
- **Designed By**: Rupesh Rao
- **Category:** Enterprise SaaS
- **Features:** Tracking customer business outcomes, Use case management, Pre-sales support, Onboarding assistance, Implementation support

Product Usage InstructionsPre-Sales Support

Before purchasing the software, customers can avail of pre-sales support to understand the product features and how it can benefit their business.

Onboarding:

Utilize the onboarding feature to set up the initial requirements and share them with the implementation team for a smooth transition.

Implementation:

During the implementation phase, collaborate with the implementation team to ensure requirements are met and follow-up processes are in place.

FAQs

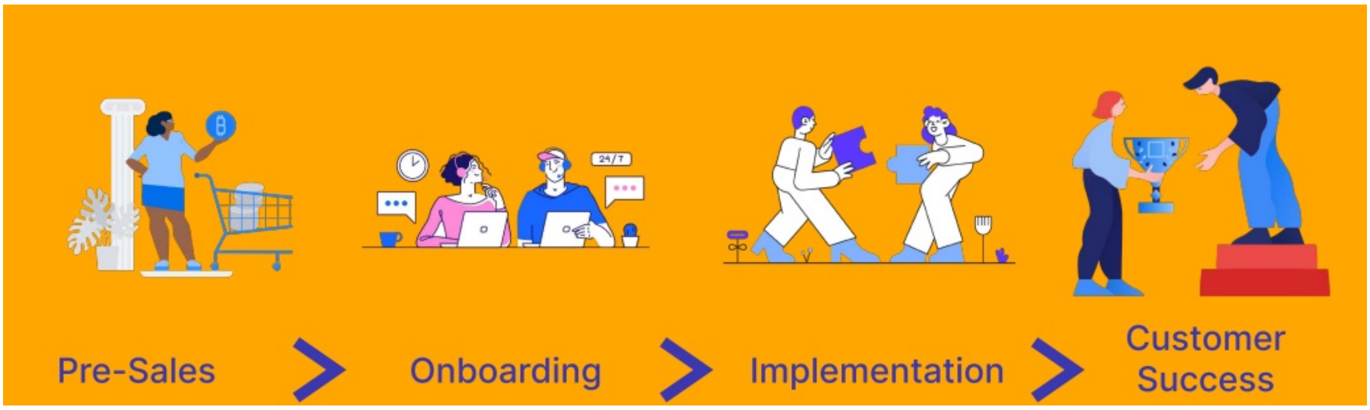
- **Q: What is the role of Pre-Sales support?**

- **A**: Pre-sales support helps customers understand the product features and benefits before making a purchase decision.

- **Q: How can I utilize the Onboarding feature?**
  - **A**: Use the onboarding feature to set up initial requirements and communicate them with the implementation team for a successful setup.
- **Q: What happens during the Implementation phase?**
  - **A**: During implementation, work closely with the team to ensure all requirements are met and follow-up processes are established for ongoing support.

The current tools for customer onboarding and legacy project management tools are mostly task-centric tools. For historical reasons, these tools were not designed to track the value delivery by tracking customer business outcomes and use cases.

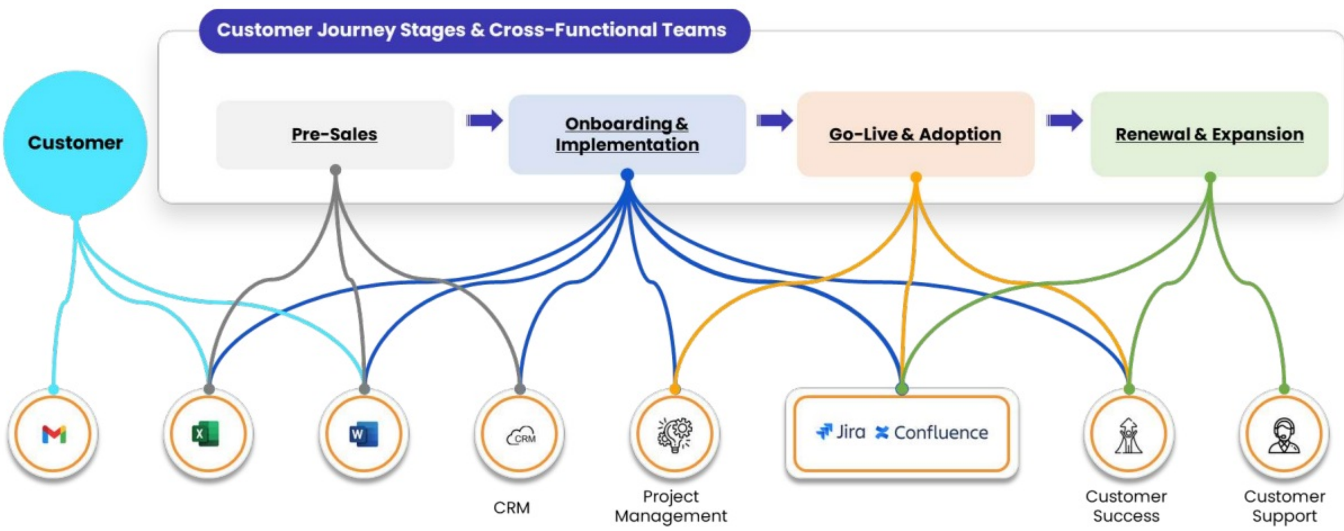
What does a customer journey look like in any enterprise SaaS industry?



Predominantly, a customer's journey in an enterprise SaaS environment consists of these four steps.

1. Pre-sales
2. Onboarding
3. Implementation
4. Customer Success

How does information flow look like in enterprise SaaS companies for each customer?



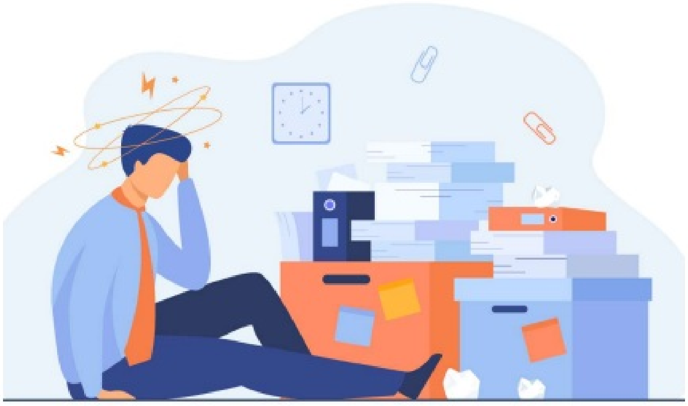
The problem with current onboarding and implementation tools

So if we take you through the entire process, it is something like this.

The sales team pursues the lead and tries to get conversions through Slack, emails, Google Sheets/Excel, and Voila! Seals the deal. Then the contract is signed and the process of knowledge transfer starts wherein the sales team gives a download of the new client to the onboarding team through emails, slack conversations, call recordings, SOWs, etc.

The onboarding team then “tries” to gather as much information from the disbursed data gathering and sets up a kick-off meeting with the customer to introduce the team and discuss the milestones, requirements, and in-depth needs of the customer.
The customer is re-iterating their requirements for the second time; once with the sales team and once with the onboarding team. The onboarding team tries to take notes of entire requirements and shares them with the implementation team

The implementation team then tries to piece together the customer requirements and tie them to the product roadmap. Now, remember, the product team wouldn’t take each customer use-case requirement into priority, but rather try to expedite and complete the pending tasks for the product development.
While the product team is working on implementations (with task allocations on JIRA or any project management tools), the customer success team takes over the customer and tries to establish a relationship with them by providing timely updates about the product milestones, progress, and delays through emails or weekly calls.



Sometimes there happens to be a delay from the customer's end as well, because of a delay in communicating to the customer on what details/documents are needed, details of their requirements, etc.

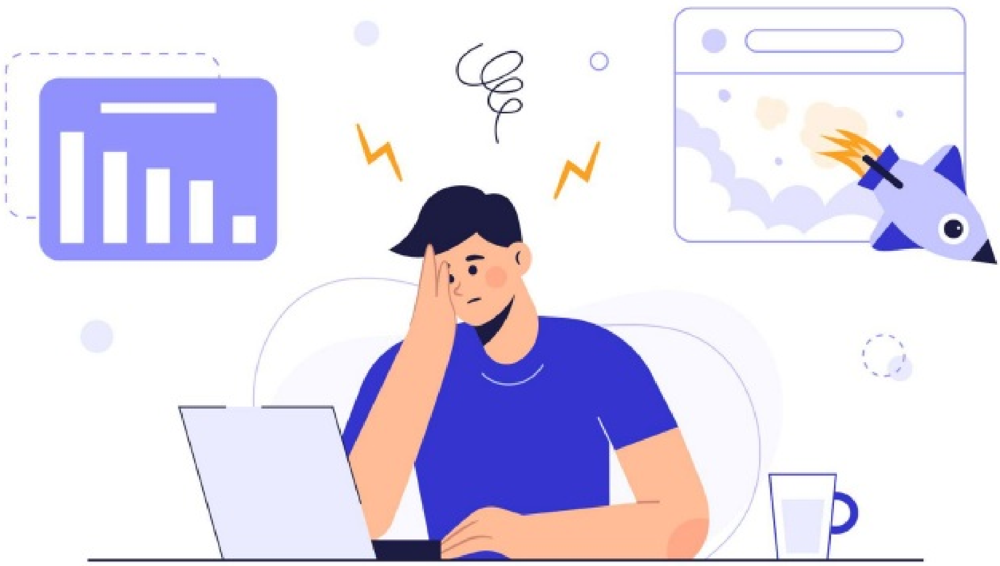
The entire follow-up process is then taken care of by the CS team via emails, calls, etc and that again causes added work on the team since it's a continuous chase till the customer provides the details on which the product team will start working on.

During this, the customer notices that the use-case requirements mentioned by them have not been implemented yet and the go-live delays are now reaching the fire-fighting stage for the CS team.

The customer is getting irate since there's a delay in achieving the use cases and that in turn, is delaying the go-live date. The customer success team is constantly working to get the customer to stay, but with the delays, the customer's decision to look for other alternatives is getting stronger day by day.
Post the go-live, the customer isn't delighted with the product delivered as there is a vast gap between what was promised to them in the pre-sales stage versus what was delivered to them on the go-live date.

Did we just describe a recipe for customer churn?

Yes, we did!



The Solution

Now when we look at the bird's eye view of the entire customer journey in an enterprise Saas business, it is evident that most of the mishaps could have been eliminated if there was some way the internal teams were in sync with each other and the customer's needs wereaccounted for from day 1.

Along with that, once the implementation stage is in process, the product manager has no idea on the prioritization of tasks and use cases as most of the information is lost or zero insights on the revenue effect.

We know customer churns are inevitable, but in 2022, with most organizations aiming to scale their business with customer-centricity, it is imprudent that they sort this issue by having a single source of truth platform for their onboarding and implementation needs.

What is a Single Source of Truth Platform?

A single source of truth is a repository where data from several platforms may be gathered and arranged in one location. It's simple to use and allows you and other team members to view data from one central spot.
During and after customer onboarding, for example, an enterprise SaaS may employ silos of tools. Other cross-functional teams may utilize a number of tools for data storage and retrieval in addition to the sales team's use of multiple technologies. And that's just for one customer.

Which Customer Onboarding Platform to Invest In?

According to Lincoln Murphy, Customer-Centric Growth Leader & Expert, 30% of the Saas companies in 2020 suffered from an unacceptable churn rate!
That means, most tools have been able to crack the issue but aren't able to provide a foolproof solution for it as they are entirely focused on providing solutions for only one or two teams involved in the customer journey. That would again leave your business, fighting the issue of information loss.

So while making the investment decision of purchasing an onboarding and implementation solution, here are a few things you need to look out for.

The right onboarding tool should be able to offer the following

Therefore it is important that the tool you invest in must provide you with the necessary infrastructure to plan and improve the speed of onboarding clients and reduce the implementation time

Facilitate Cross-Functional Collaboration

Stressing on the very important fact here, i.e. loss of information due to different silos of tools.
The customer-centric onboarding and implementation platform should be able to provide a single source of truth base for each client, to not lose any data or customer information during the handoff.
Easier collaboration between internal teams and customers will help increase the implementation team's efficiency.

Effortless Visibility

Most of the project managers or the customer success teams spend their time collating the required information by scavenging on different tools. These data are then to be presented to the internal teams and the customer in the process called reporting.
There is a high possibility that they might have skipped on a few major pieces of information, owing to the time required as well as accounting for the manual error.

Hence, the platform you should be investing in should be able to provide effortless visibility on crucial data that can help the project managers and the implementation teams to work on their product roadmap and allocate resources accordingly.

Entire Customer Context at Fingertips

The tool should be able to provide you with a single-click view of projects, use cases, tasks, and project dependencies of customers in a holistic way.

Now the implementation leads wouldn't have to go back and forth with the accounts teams or the customer success teams to understand the requirements of each and every customer. Back and forth of information is a recipe for delays and customer escalations.

Help evaluate & minimize revenue risks

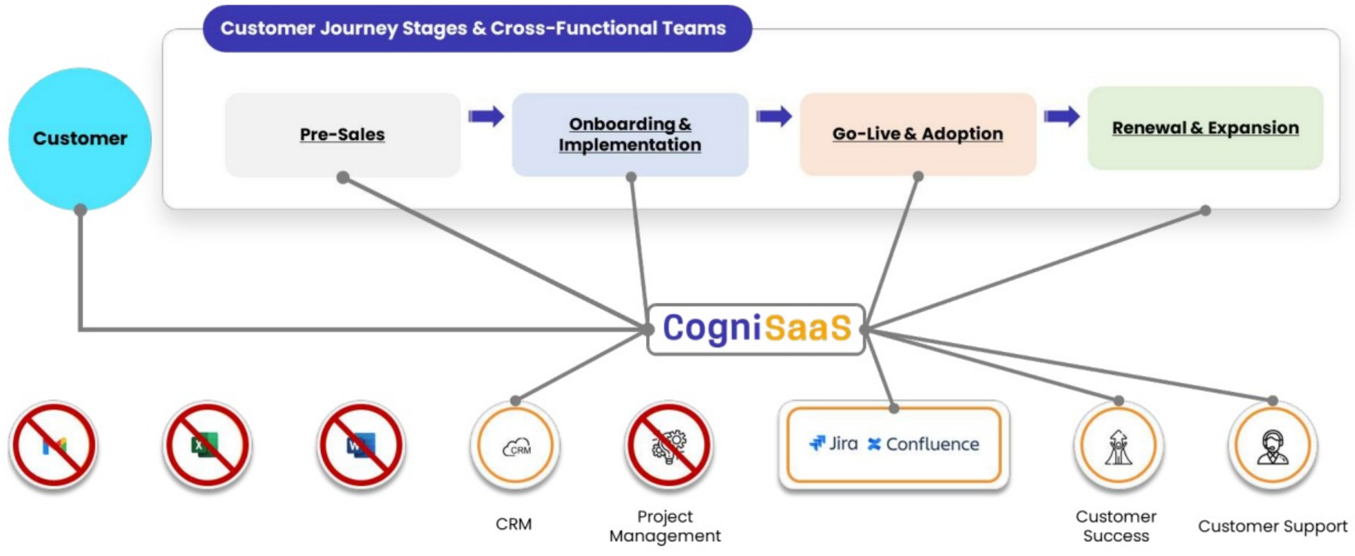
A comprehensive customer onboarding and implementation tool should be able to provide actionable insights and recommendations to help your teams speed up prioritization not just on task levels, but on use-case levels.

Once the teams are able to recognize the revenue risks, this will help fuel prioritization of what needs to be given more attention and thereby helping cross-functional teams to achieve unanimous success!
Evaluation should also help your teams and customers understand accountability and dependencies of tasks and use cases, thereby helping a seamless collaboration amongst the teams.

About CogniSaaS

It takes a village to raise a child. In B2B SaaS companies it takes Sales, Onboarding, Customer Success, and Product and Engineering teams to deliver customer success.
Successful customer onboarding and implementation depend on seamless collaboration with customers as well as (if not more important) among internal cross-functional teams to track, prioritize and deliver value.

Customer onboarding isn't only about collaboration on tasks and documents. Especially for enterprise/mid-market customers, Onboarding/Implementation teams need to ensure the 'value delivered' is completely aligned with the 'value promised' in the sales cycle.



Here is how our customers achieve all of this on a 'single source of truth':

- Handover from the Sales to Onboarding/Implementation teams happens in a structured format on what business outcomes/use cases/modules were promised (some of this is automated via API integration with CRM). The users can also define certain fields to be mandatory along with document attachments to ensure handover compliance and nothing 'falls through the cracks' (in emails/slack channels).
- The onboarding team creates a project (via templates) and under this project adds not only the implementation tasks but also all the business outcomes/modules/use cases (via use case templates) – to get RAG status at not just project and task level but also module wise tracking of RAG status.
- Cross-functional teams from Onboarding/Implementation, Solutions, Customer Success, Product, and Engineering collaborate on this common platform to:
    - Map the business outcomes/use cases with relevant product modules and features
    - Map which customer requirements can be delivered with the existing product features out of the box
    - Raise requests for a new product feature, enhancements, API integrations, configuration, and customizations (create Jira tickets via our bi-directional API integration) for seamless collaboration between teams
- Onboarding teams can also collaborate with customers on any tasks/dependencies from their side and project status reporting with one click. Customers receive magic links in an email that allows them to view/update status from their side with one click (no login required).
- Customer Success leadership teams also have access to a revenue dashboard that shows the revenue impact of any delays.
- Finally, instead of doing manual prioritization in weekly meetings between Sales, CS, and Product teams via complex Excel sheets – our customers save significant time and effort and achieve customer-centric prioritization. Our proprietary algorithm shows actionable insights on what should be prioritized in the product roadmap and project implementation tasks to ensure faster time-to-value for customers and minimize revenue risk for the company.

CogniSaaS is currently being used by value delivery teams at PeopleStrong, Zimyo, Capillary, Talview, and Zing HR.

If you are looking to reform your current customer onboarding process, feel free try a 14-day free trial with CogniSaas or you can request a demo with us.

Guide to buying onboarding and implementation software

Documents / Resources

	[CogniSaaS Customer Onboarding Platform Platforms Software](#) [pdf] User Guide Customer Onboarding Platform Platforms Software, Onboarding Platform Platforms Software, Platform Platforms Software, Platforms Software

References

- Cognisaas
- SaaS Churn Rate - What's Acceptable?
- Request Demo for Customer-Centric Onboarding
- User Manual