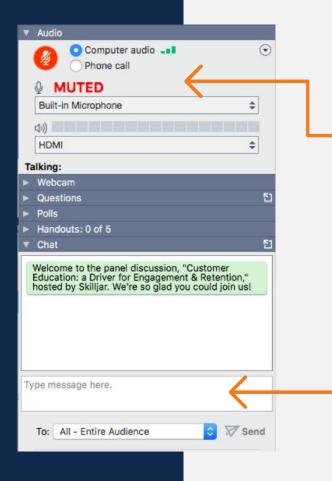


New Formula for Customer Onboarding





Housekeeping

Select your audio here and dial in through a phone if you're having difficulty hearing.

Participate here—ask questions, let us know if you have any technical issues.



Speakers



Adam Avramescu

Head of Customer Education & Training, Checkr



Linda Schwaber-Cohen

Product Marketing, Skilljar







More from Adam



About Skilljar

Industry leading Customer Training Platform

- Drive Modern Training Experiences
- Accelerate Product Onboarding and Adoption
- Enable Customer Engagement

Winner of the 2017, 2016 and 2015 Brandon Hall Group Excellence Awards: Best LMS for External Training







The Rise of Customer Onboarding



Lack of product adoption is the number one customer journey challenge faced by customer success organizations

2018 Customer Success Industry Report, Coastal Cloud

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Common Onboarding Mistakes

MISTAKE #1

There is one right way to onboard customers, and a set of best practices everyone should follow.

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There is one right way to onboard customers, and a set of best practices everyone should follow.

MISTAKE #2

Account onboarding = user onboarding

MISTAKE #1

There is one right way to onboard customers, and a set of best practices everyone should follow.

MISTAKE #2

Account onboarding = user onboarding

MISTAKE #3

Onboarding should be owned by one team.

The New Formula for Customer Onboarding

4 Onboarding Archetypes

Any company may have multiple in play simultaneously





Your Product Adoption Landscape

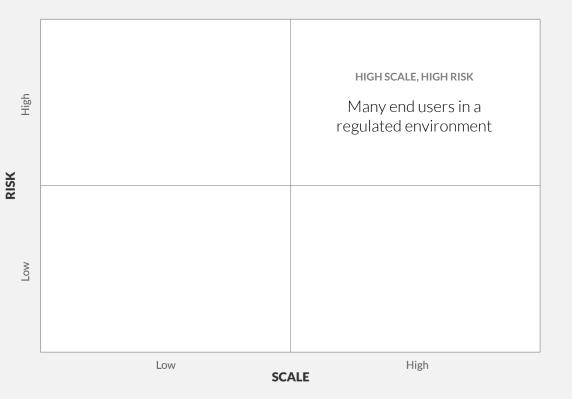
Risk

What could go wrong for the customer if you don't have users and accounts properly educated?

Scale

How broadly is your product adopted, and how different do those adoption behaviors look across your user base (use cases)?





Reasons to have multiple archetypes in a company:

- 1. Multiple product lines
- 2. Large disparity in usage among different user types in your client base
 - 1. Admin/End User
 - 2. Enterprise vs SMB segments



RISK Low High		нідн scale, нідн risk Many end users in a regulated environment
		HIGH SCALE, LOW RISK Many end users where the goal is broad adoption and behavioral change
	Low SCA	High

Reasons to have multiple archetypes in a company:

- Multiple product lines 1.
- Large disparity in usage 2. among different user types in your client base
 - Admin/End User 1
 - Enterprise vs 2. SMB segments



SK High	LOW SCALE, HIGH RISK Highly specialized users where error brings high risk	нідн scale, нідн risk Many end users in a regulated environment
Low		HIGH SCALE, LOW RISK Many end users where the goal is broad adoption and behavioral change
	Low	High

Reasons to have multiple archetypes in a company:

- Multiple product lines 1.
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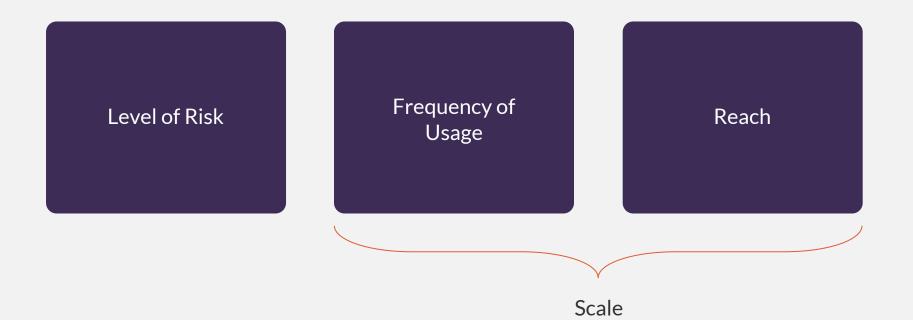
RISK

High	LOW SCALE, HIGH RISK Highly specialized users where error brings high risk	HIGH SCALE, HIGH RISK Many end users in a regulated environment
Low	LOW SCALE, LOW RISK Products adopted by specialists that are highly customized but won't bring your business to a halt	HIGH SCALE, LOW RISK Many end users where the goal is broad adoption and behavioral change
	Low SC/	High ALE

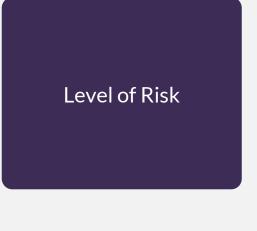
Reasons to have multiple archetypes in a company:

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Risk of making a critical mistake due to improper use of product.

- Improper access to sensitive information
- Ability to cause organizational mayhem
- Physical danger
- Legal implications

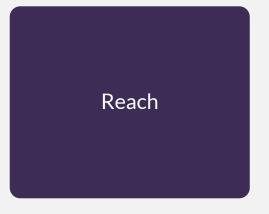




How often the average user engages with your product.

- Is this a product that will be used throughout the day every day, or just once in a while?
- Are you trying to develop new work habits among your user base or solving a more pointed problem?





The number of users in an account that need to be onboarded.

• Does everyone need to use this product or just a few select people in the company?



Defining the Education Mix

RISK

High	LOW SCALE, HIGH RISK Highly specialized users where error brings high risk	HIGH SCALE, HIGH RISK Many end users in a regulated environment
Low	LOW SCALE, LOW RISK Products adopted by specialists that are highly customized but won't bring your business to a halt	HIGH SCALE, LOW RISK Many end users where the goal is broad adoption and behavioral change
L	Low SC/	High

Each archetype has its own "Education Mix."

High Scale, High Risk

- High stakes certification process
- Online proctoring
- Accessible education offerings on-demand offerings for User Onboarding
- More frequent assessments
- Potential for learning labs
- Formal corporate roll outs

High oversight on completion and scoring

 Customer "manager" role - like Skilljar
 analytics functionality for group
 managers

a skilljar

- Job Aids
- Train the Trainer
- Regular v-ILT offerings for advanced topics

High **SCALE**

RISK High

High Scale, Low Risk

skilljar

- Accessible education offerings on-demand
- Walkthrough wizards (technology like WalkMe, Appcues, Pendo) and in-product education
- Broad analytics reviews
- Basic 1:many live sessions (V-ILT)
- Change management training
- Informal corporate roll outs

- Adoption reminders and marketing
- Microlearning videos
- Email nurture campaigns
- Basic certification

High SCALE

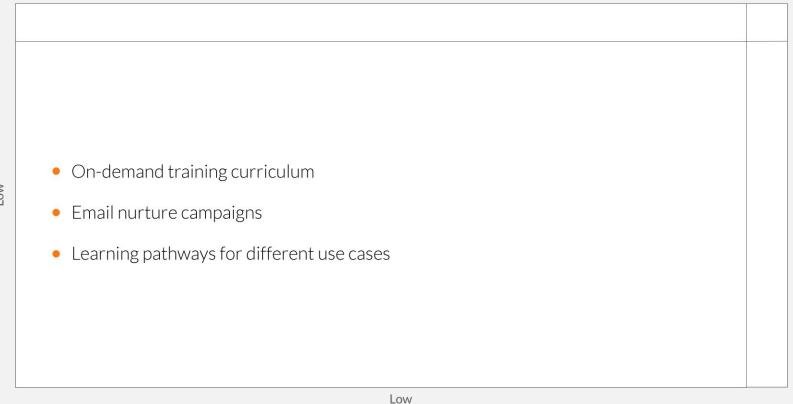


Low Scale, High Risk Highly specialized users where error brings high risk

- Live labs
- Live Training Curriculum
- Personalized training plans
- Clear training paths for different use cases
- Close relationship/collaboration between Customer Success and Education

Low Scale, Low Risk Products adopted by specialists that are highly customized but won't bring your business to a halt

a skilljar



SCALE

RISK Low

Education Mix Across Archetypes

High	 Live labs Live Training Curriculum Personalized training plans Clear training paths for different use cases Close relationship/collaboration between Customer Success and Education 	 High stakes certification process Online proctoring Accessible education offerings - on-demand offerings for User Onboarding More frequent assessments Potential for learning labs Formal corporate roll outs 	 High oversight on completion and scoring - Customer "manager" role - like Skilljar analytics functionality for group managers Job Aids Train the Trainer Regular v-ILT offerings for advanced topics
Low	 On-demand training curriculum Email nurture campaigns Learning pathways for different use cases 	 Accessible education offerings - on-demand Walkthrough wizards (technology like WalkMe, Appcues, Pendo) and in-product education Broad analytics reviews Basic 1:many live sessions (V-ILT) Change management training 	 Informal corporate roll outs Adoption reminders and marketing Microlearning videos Email nurture campaigns Basic certification

RISK

Getting Started

- Define which Onboarding archetypes are for your company? How many are there? And which are highest priority for optimizing?
- Shadow a customer onboarding are you using the wrong onboarding for the wrong archetype right now?
- Do the most impactful thing first.
- Lay a foundation for measurement.



Our Next Webinar



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WHY SMART COMPANIES PROFIT BY MAKING CUSTOMERS SMARTER



Customer Education Why Smart Companies Profit by Making Customers Smarter

By Adam Avramescu

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Questions?



Thank You!