CUSTOMER SUCCESS
SUMMIT
PRESENTED BY TOTANGO

Digital Onboarding & At Scale Accelerator

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Agenda

1. First, there was 1:1
2. Then, there was 1:many
3. Accelerator is born

Katie Rich

Senior Director, Product Experts Group
Totango

I've spent the last 15 years leading operations, support and program management teams in software, service and online marketplace companies.

Our First Challenge

We started with one group that did everything from Onboarding to Customer Success

As we grew, they were consumed with Onboardings and we were not onboarding as fast as we were growing

We needed to scale quickly

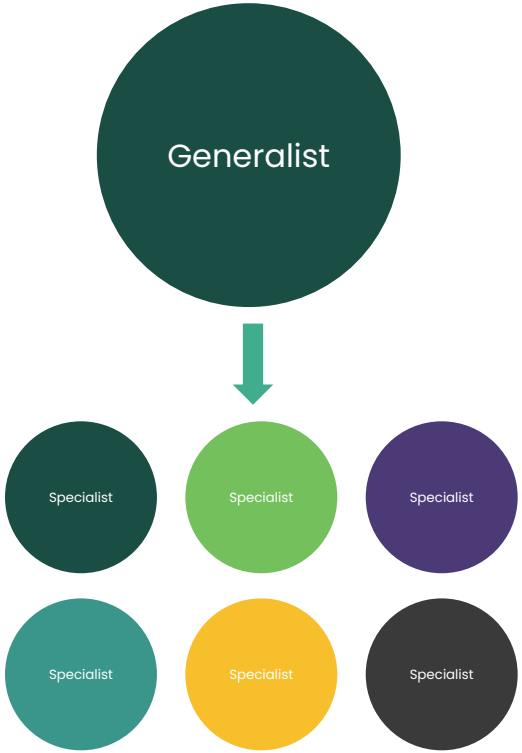
First, there was 1:1

Generalist » Specialist

What we did

The Product Experts Group was formed and within it, a team of Onboarding specialists

We defined the charter for this new group and then the technology that we needed to drive their processes and measure the program



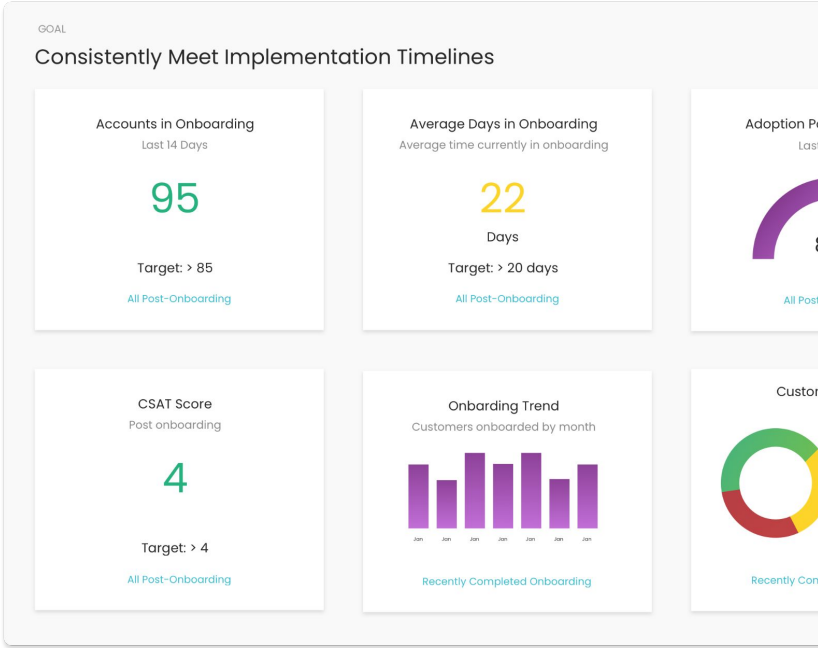
What we did

In Totango, is was easy to build a repeatable, scalable model.

Started with simple KPI for success:
Days in Onboarding and CSAT

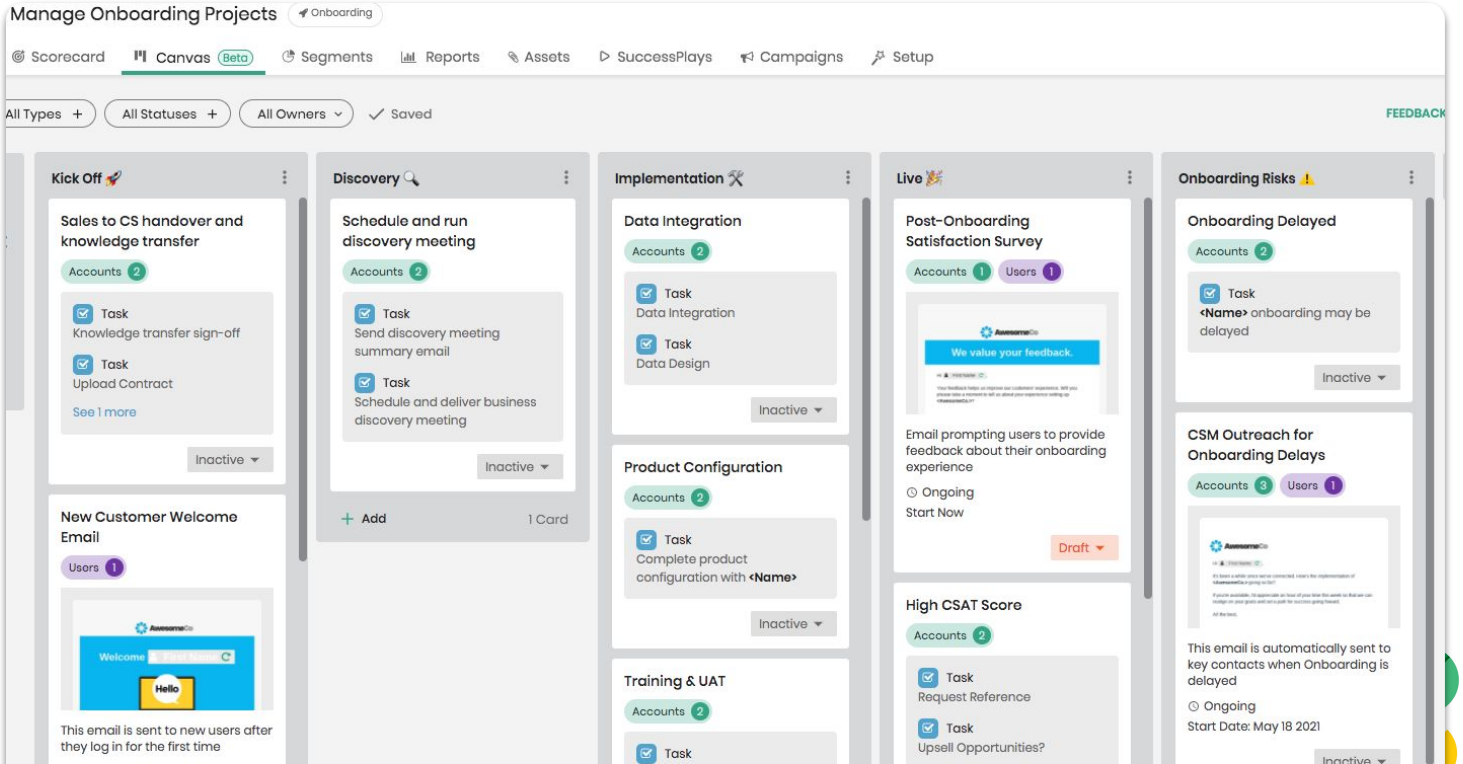
We were able to iterate the program quickly based on our learnings and add more KPI

Refined processes over time to meet new targets



Results

We were able to quickly get the program stood up successfully, high CSAT and scaled with growth
Took our learnings and modeled the Manage Onboarding Projects SuccessBLOC



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Our next challenge

As Totango took off, we had so many customers and needed to scale quickly again

Our Product Led Growth strategy was bringing in a more diverse customer segment mix

Our High Touch model was no longer scalable and no longer worked for all of our customers.

Then there was 1:many

High Touch » 1:many

What did we do

Simplified, Streamlined & Scaled to 1:many

We started with a campaign driven program:

- Invites to Live Webinars
- 1:1 checkpoints with experts

We were Onboarding many customers at once.

Live Session

"Manage Onboarding Projects" SuccessBLOC Configuration Session

Step through configuration and activation of the Manage Onboarding Projects SuccessBLOC. Learn how to define your Onboarding Stages, the tasks required to complete each stage and how to build this process in Totango.

Hosts: **Jeff Brown and Stacey Freeman**
Schedule: **Bi-Weekly**

Live Session

High Touch Onboarding Health Configuration

Learn how to configure and enable the High Touch Onboarding health profile in Totango and start measuring the health of your customer's in Onboarding.

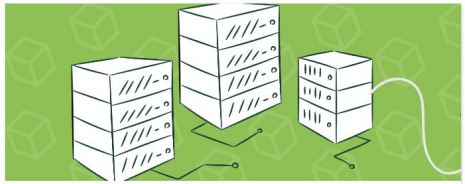
Hosts: **Jeff Brown and Stacey Freeman**
Schedule: **Bi-Weekly**

Live Session

Train the Trainer

Attend our Train the Trainer session and learn about the day in the life of a CSM and how to enable your team to start using Totango and your SuccessBLOC to onboarding your customers.

Hosts: **Jeff Brown and Stacey Freeman**
Schedule: **Bi-Weekly**



Live Session

Ask Me Anything Data Session

From integrating your data sources to configuring your queries correctly, our weekly Ask Me Anything sessions help you get your data up and running quickly.

Hosts: **Val Lapidus and Shmulik Golan**
Schedule: **Bi-Weekly**

Accelerator

Onboarding at Scale

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Then what did we do

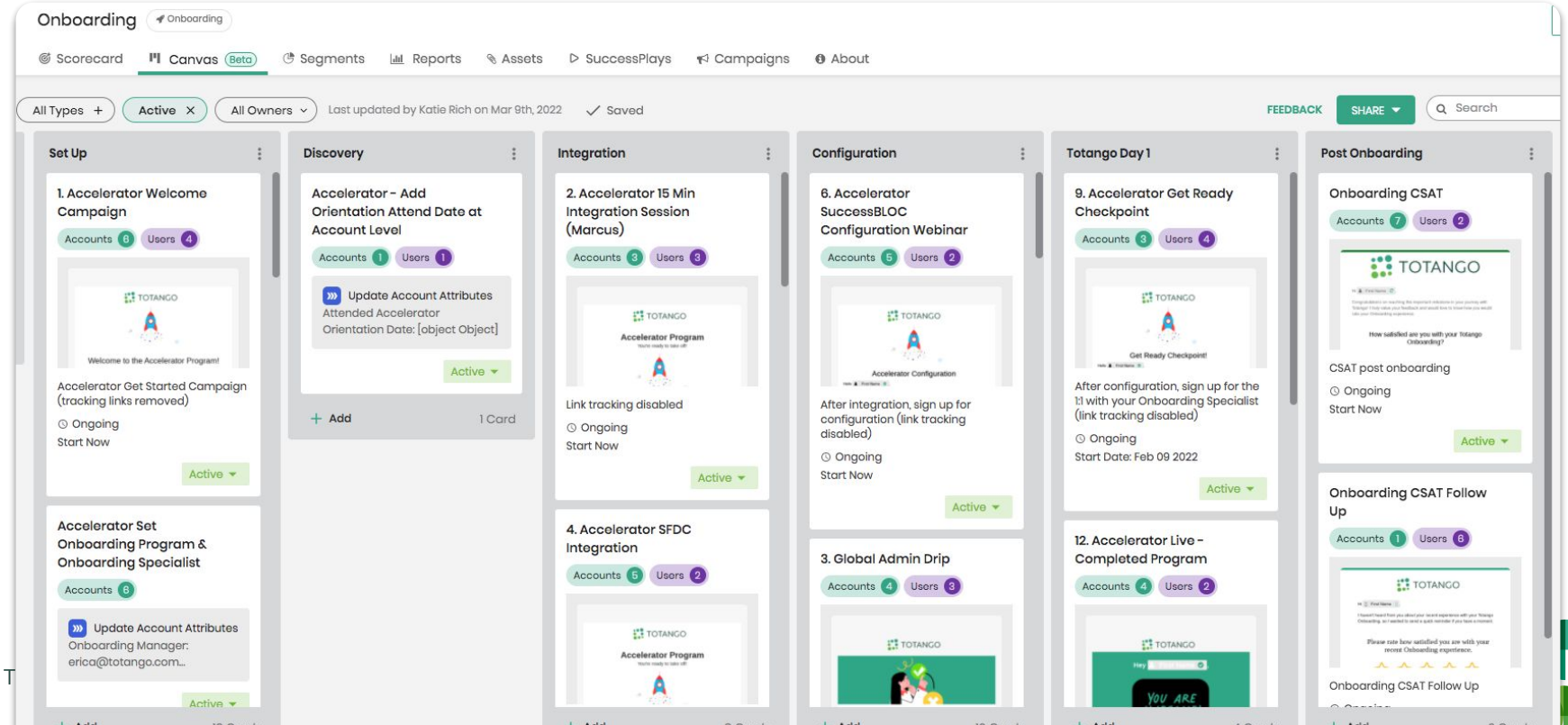
We iterated.

We quickly learned that customers moved faster with recorded content, opting out of our live sessions

We added a campaign series of recorded trainings videos throughout the program and saw activities in Totango increase

Accelerator Onboarding

A rich and dynamic program, driven by campaigns and automations to collect data and move through the program



Results

3.5X

Successfully onboarded 3.5x more customers in 2021 vs 2020

28%

Reduction in Days to Onboarding for Mid-Market Accelerator

97%

CSAT!

Takeaways

Get started with what you have and what you know

Learn from your starting place and iterate quickly

Thank You