

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**

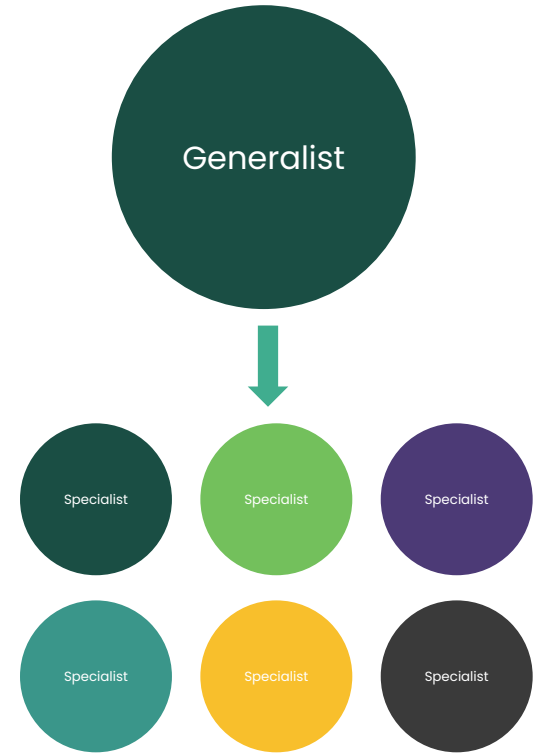
Generalist » Specialist



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



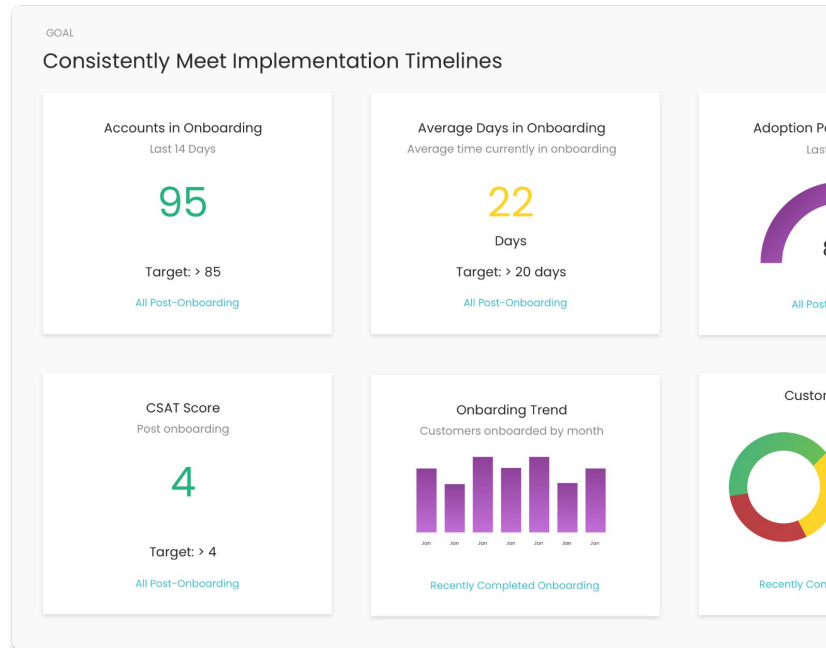
What we did

In Totango, it 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

The screenshot displays the 'Manage Onboarding Projects' interface, which is organized into a grid of project cards. The top navigation bar includes tabs for Scorecard, Canvas (Beta), Segments, Reports, Assets, SuccessPlays, Campaigns, and Setup. Below the navigation bar, there are filters for 'All Types', 'All Statuses', and 'All Owners', along with a 'Saved' checkbox and a 'FEEDBACK' button.

The main content area features several project cards, each with a title, a description, and a list of tasks. The cards are categorized into different stages of the onboarding process:

- Kick Off:** Includes tasks like 'Sales to CS handover and knowledge transfer', 'Accounts' (2), 'Task Knowledge transfer sign-off', 'Task Upload Contract', and a 'See 1 more' link. The card is marked as 'Inactive'.
- Discovery:** Includes tasks like 'Schedule and run discovery meeting', 'Accounts' (2), 'Task Send discovery meeting summary email', and 'Task Schedule and deliver business discovery meeting'. The card is marked as 'Inactive'.
- Implementation:** Includes tasks like 'Data Integration', 'Accounts' (2), 'Task Data Integration', 'Task Data Design', 'Product Configuration', 'Accounts' (2), 'Task Complete product configuration with <Name>', and 'Training & UAT', 'Accounts' (2), 'Task'. The card is marked as 'Inactive'.
- Live:** Includes tasks like 'Post-Onboarding Satisfaction Survey', 'Accounts' (1), 'Users' (1), 'Email prompting users to provide feedback about their onboarding experience', 'Ongoing Start Now', and 'High CSAT Score', 'Accounts' (2), 'Task Request Reference', 'Task Upsell Opportunities?'. The card is marked as 'Draft'.
- Onboarding Risks:** Includes tasks like 'Onboarding Delayed', 'Accounts' (2), 'Task <Name> onboarding may be delayed', and 'CSM Outreach for Onboarding Delays', 'Accounts' (3), 'Users' (1). The card is marked as 'Inactive'.

The interface also includes a 'New Customer Welcome Email' section with a 'Users' (1) count and a 'Hello' button. A note at the bottom states: 'This email is sent to new users after they log in for the first time'.

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.

1



Manage Onboarding Projects

Dramatically improve the new customer onboarding journey and delight end users with a consistent, efficient ...

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**

2

Health in Onboarding



Health Status	Percentage
Poor	13%
Average	40%
Good	47%


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**

3




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



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

The screenshot displays the 'Onboarding' program interface, which is organized into a grid of campaign cards. The top navigation bar includes 'Scorecard', 'Canvas (Beta)', 'Segments', 'Reports', 'Assets', 'SuccessPlays', 'Campaigns', and 'About'. Below this, a filter bar shows 'All Types' (Active), 'All Owners', and a date filter 'Last updated by Katie Rich on Mar 9th, 2022'. A 'FEEDBACK' button and a 'SHARE' dropdown are also present, along with a search bar.

The main content area is divided into six columns, each representing a stage of the onboarding process:

- Set Up:** Contains two cards. The first card, '1. Accelerator Welcome Campaign', shows 6 Accounts and 4 Users, with a 'Welcome to the Accelerator Program!' message and a 'Get Started Campaign' link. The second card, 'Accelerator Set Onboarding Program & Onboarding Specialist', shows 6 Accounts and includes an 'Update Account Attributes' button with the email 'erica@totango.com...'. Both cards are marked 'Active'.
- Discovery:** Contains one card, 'Accelerator - Add Orientation Attend Date at Account Level', showing 1 Account and 1 User. It includes an 'Update Account Attributes' button with the field 'Orientation Date: [object Object]'. The card is marked 'Active'.
- Integration:** Contains two cards. The first card, '2. Accelerator 15 Min Integration Session (Marcus)', shows 3 Accounts and 3 Users, with a 'Link tracking disabled' message. The second card, '4. Accelerator SFDC Integration', shows 5 Accounts and 2 Users, with a 'Link tracking disabled' message. Both cards are marked 'Active'.
- Configuration:** Contains two cards. The first card, '6. Accelerator SuccessBLOC Configuration Webinar', shows 5 Accounts and 2 Users, with a 'Link tracking disabled' message. The second card, '3. Global Admin Drip', shows 4 Accounts and 3 Users, with a 'Link tracking disabled' message. Both cards are marked 'Active'.
- Totango Day 1:** Contains one card, '9. Accelerator Get Ready Checkpoint', showing 3 Accounts and 4 Users, with a 'Get Ready Checkpoint!' message and a 'Link tracking disabled' message. The card is marked 'Active'.
- Post Onboarding:** Contains two cards. The first card, 'Onboarding CSAT', shows 7 Accounts and 2 Users, with a 'CSAT post onboarding' message and a 'Link tracking disabled' message. The second card, 'Onboarding CSAT Follow Up', shows 1 Account and 6 Users, with a 'CSAT post onboarding' message and a 'Link tracking disabled' message. Both cards are marked 'Active'.

Each card features a 'TOTO' logo and a 'Start Now' button. The interface is clean and modern, with a light gray background and white cards.

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

