

## The Onboarding Experience



Transition to Customer Success to begin onboarding process

DAY 1

- · Discuss goals
- Review onboarding schedule

#### **Customer Tasks**

 Review Onboarding Prep Guide prior to call



Work with Customer Success to setup account and schedule training

WEEK 1

**WEEK** 

**WEEK** 

WEEK

6+

- Setup account, import users/contacts and provide login credentials
- Develop custom Job Launch form(s)

### **Customer Tasks**

 Provide items from Account Setup Checklist



Train admin users inMotion features and account customization

 High level overview of features to lay foundation of inMotion tool

 Deeper dive into advanced features and custom settings

#### **Customer Tasks**

- Follow each self-paced learning guide
- Compile a list of questions for training follow-up calls



Conduct role-based training for key inMotion users and stakeholders

- · Staff Team Training
- Formalized, online training sessions with requesters and reviewers

#### **Customer Tasks**

 Complete Team Training Outline prior to call



Organizational role-out and system optimization

• Optional Pilot Team launch

- · Final rollout assistance
- Go Live!
- Reporting overview and discuss usage patterns

#### **Customer Tasks**

- Compile list of questions from team to review
- Prepare for change management



# Onboarding Activities

	ACTIVITY	DURATION	DESCRIPTION
Kickoff Call	Kickoff Call	30 mins	Discuss goals and review onboarding schedule
Account Setup	inMotion Setup	1 day - 1 week	Your Customer Success representative will set up your account and email the login credentials to you
Admin Training	Self-Paced Learning	1 week	Follow Feature Overview Guide to familiarize yourself with the basic features of inMotion
	Feature Overview Call	1 hour	Feature and functionality review, discuss settings and configuration
	Self-Paced Learning	1 week	Follow Account Customization Guide for additional system use and configuration
	Account Customization Call	1 hour	Discuss additional questions, review opportunities for customization, and prepare for Team Training
Team Training	Team Training	1 hour	Online training session with additional users
	Requester/ Reviewer Training	30 mins	Online training session with request submitters and reviewers
Launch!	Usage Review Call	1 hour	Discuss usage patterns, features Q&A, reporting overview, and final rollout assistance