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Onboarding Plan

🤝 Sales Hand-off

Transferring the relationship from sales to the success team.

☎️ Kick-off Call

Setting expectations around the onboarding process, due dates, work required by both parties, and points of contact.

✅ Implementation

Importing data / processes, setting up new meetings, creating rituals and testing systems.

🎓 Training

Helping the customer educate their employees, making sure everybody understands how to use Kunveno, and final prep for launch.

🚀 Launch/Rollout

The moment the customer begins using the product in a fully live state and to solve real problems.

🎉 Review

Getting feedback from the customer about how the launch went, how they're using the product, and their plans for further usage

☎️ Kickoff

A few days or a week after the purchase/trial Completion

Discuss and set goals (30 hour)

- ➢ Set and document KPIs (15 minutes)
- ➢ Select first customer rollout candidate (15 minutes)

🧰 System Setup

No effort on the client's part

Starts in the days after kickoff and takes 1-2 hours max.

- ➢ Mapping of the team structure
- ➢ Creation of test kudos
- ➢ Individualisation of onboarding materials

🚀 Rollout

As soon as the system set-up is completed

- ➢ Quick onboarding of those responsible for the ritual (15 minutes
- ➢ Joint presentation of Kunveno with the rollout client to all potential users (10-15 minutes)
- ➢ Provision of onboarding materials

👏 Check-Ins

~2-4 weeks turnus after rollout.

- ➢ Check-in conversation to review the rollout (15 minutes)

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➢ Derive potential improvements. Collect feedback from internal users and rollout customers (15 minutes)