A Day in the life of an Onboarding Specialist

Who is the onboarding specialist?

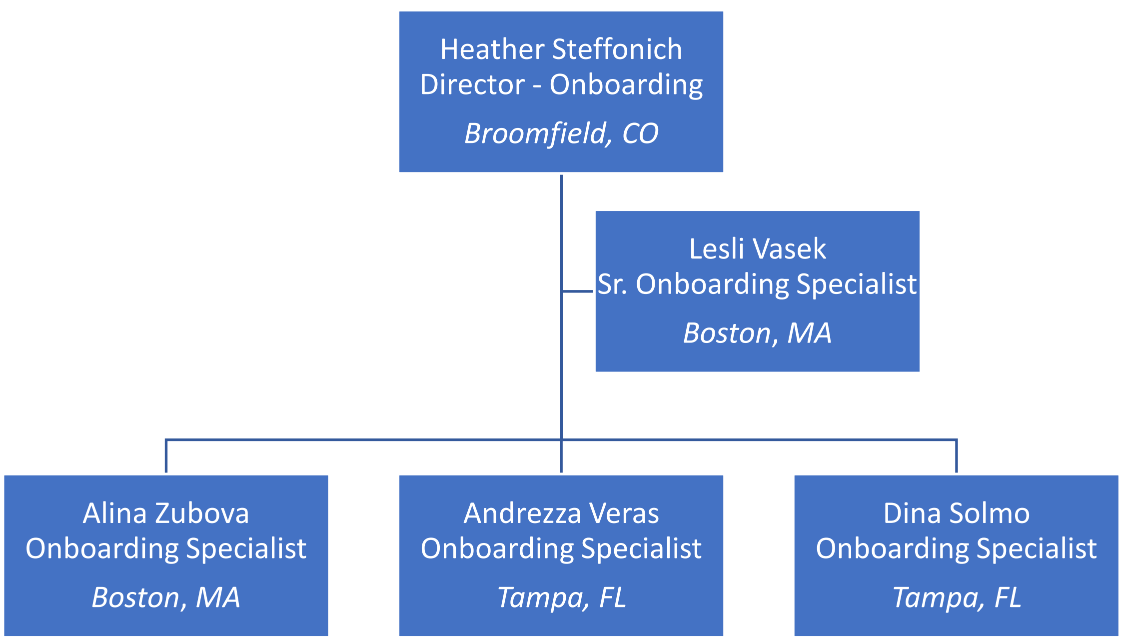
The onboarding specialist is the first point of contact after the sales process is completed and ensures that the customer receives a warm welcome and has a good experience in starting to use their Validity solutions.

The onboarding specialist helps Validity clients understand and implement the Validity solutions during their Onboarding Journey and provides them with product implementation assistance and in-depth product training.

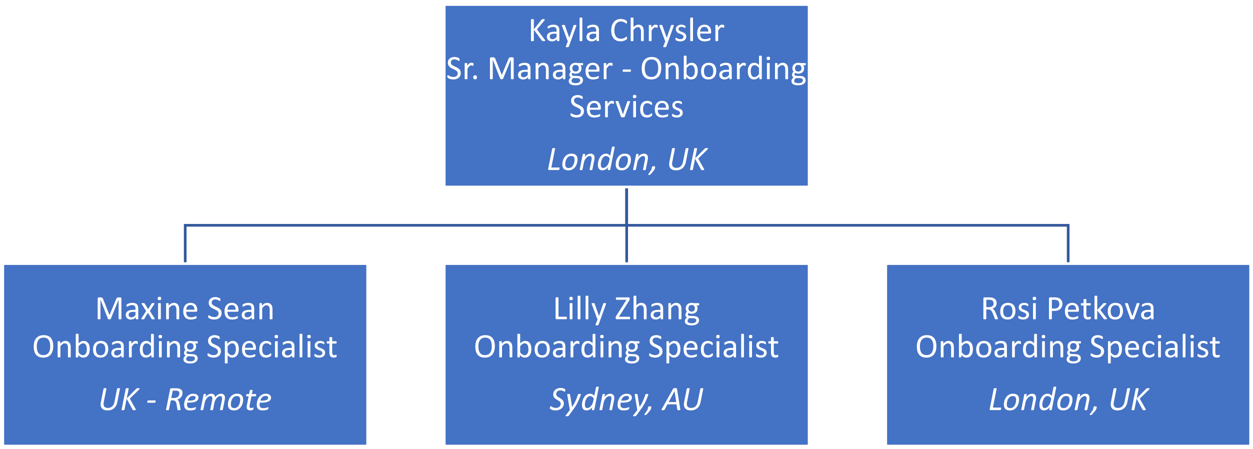
The onboarding specialist will monitor, communicate, follow-up, test and troubleshoot with the client to ensure that all requirements to start using the Validity solutions have been met, the mandatory onboarding steps are completed and the path to success and next steps have been defined.

The onboarding team

Team US



Team International



Find out more about the team here: [Onboarding Team – Who We Are]

Validity Solutions

We provide onboarding for both data and email solutions.

Data
VDM – Validity for Data Management - DemandTools, Demantools V, DupeBlocker, PeopleImport
VSP - GridBuddy Cloud, Trust Assessment
DemandTools / Demantools V standalone
GridBuddy Cloud standalone

Email
Everest

BriteVerify

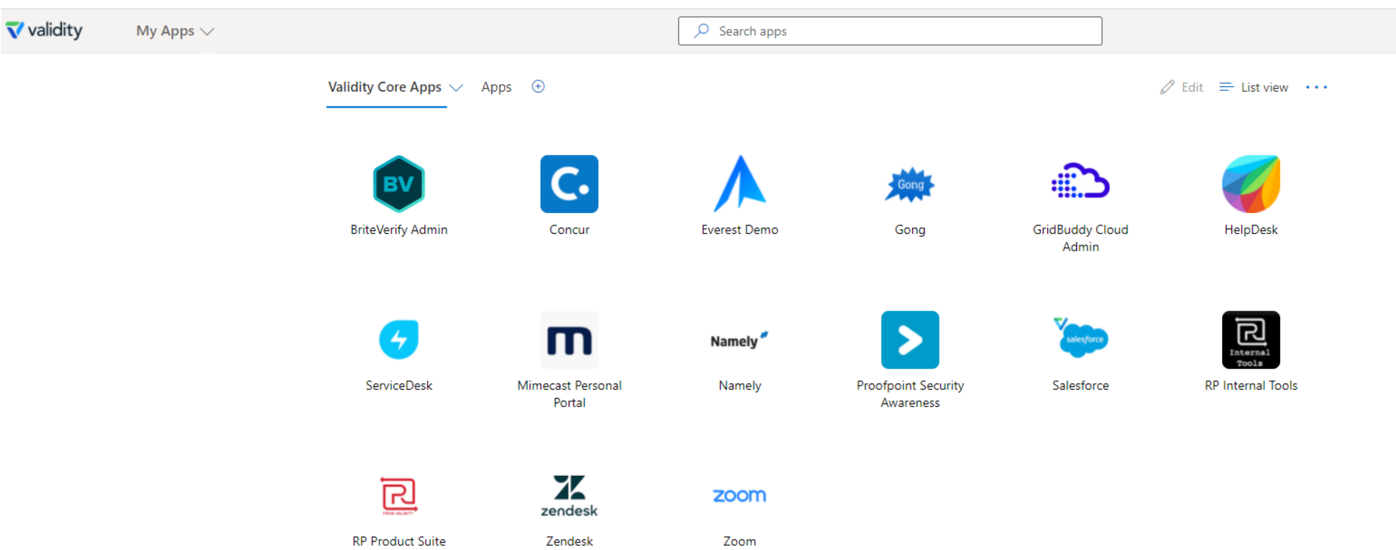
Return Path	we process renewals only; we do not provide onboarding support, but we assist with upgrades to Everest
250ok	

Start of the day

My day begins with logging into the systems we use. Some of the most frequently used systems we are:

- Office 365 – we use mostly Outlook, Word, Excel, PowerPoint, OneDrive, SharePoint
- Slack – to communicate internally with colleagues
- Zoom – to conduct video meetings and webinars
- Salesforce – our CRM platform. Learn more about Salesforce by joining Trailhead
- ChurnZero – used to track accounts and onboarding progress. Learn more about Churnzero here: ChurnZero Academy
- Zendesk – used for opening ticket; mostly for tickets with our support team, which we can also email on support@Validity.com (however opening a ticket is preferred)
- Cisco – connect your VPN
- Namely – HR platform, which we use to submit our holidays 😊

You can find the apps we use under My Apps - https://myapplications.microsoft.com/



Provisioning systems we use:

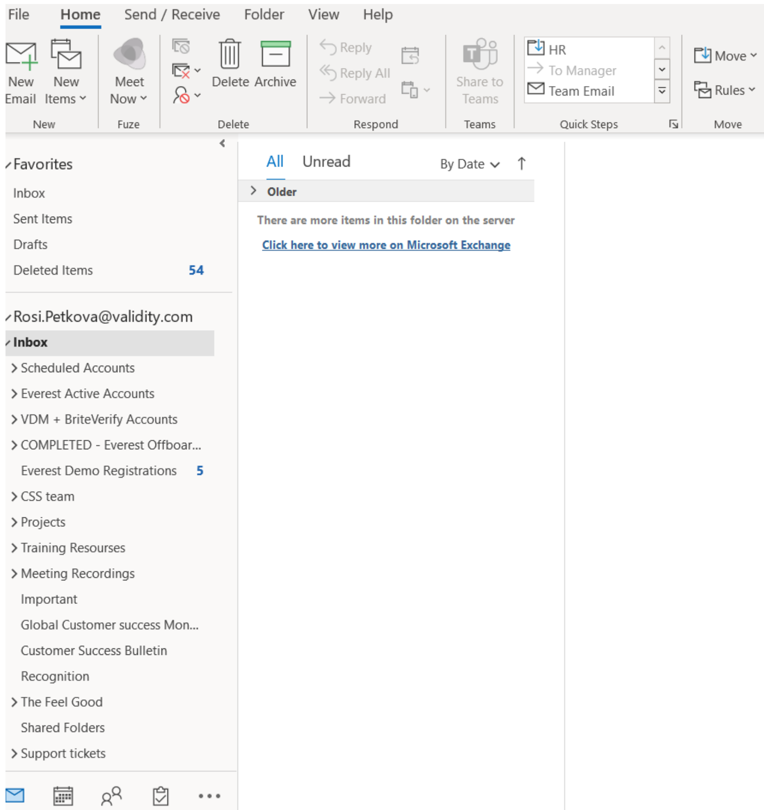
BriteVerify Admin	GridBuddy Cloud	Everest Admin
BriteVerify Admin	GridBuddy Cloud Admin	
RP Internal Tools	VES	250ok
RP Internal Tools		

In My Apps you can also find the Everest demo account that we use for trainings:

Everest Demo Account

Everest Demo

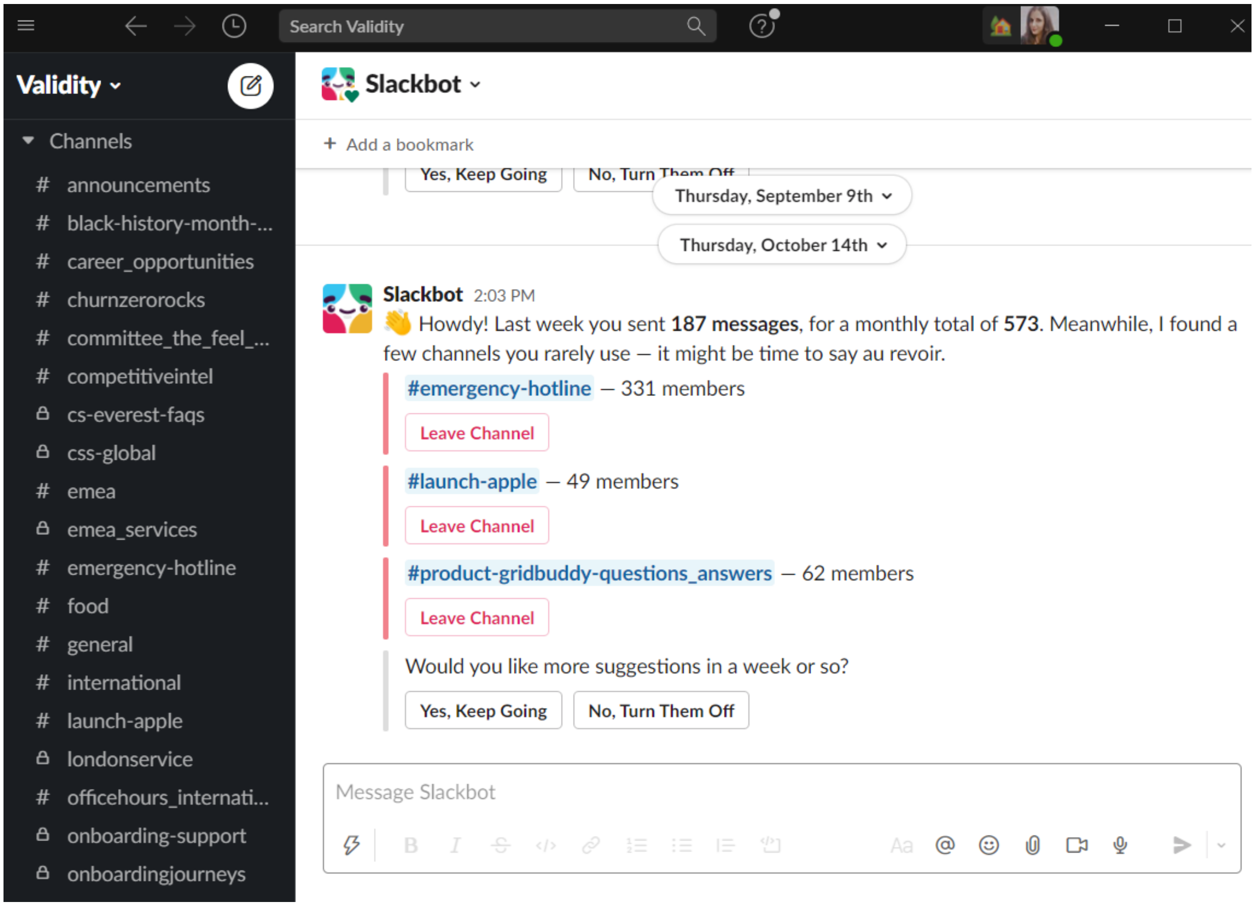
One of the first things I do is to check my emails and Slack messages. We use outlook to respond to clients emails and we use Slack to communicate internally.



When I check my emails first thing in the morning, I flag the ones I need to respond, delete unnecessary notifications, and organise my mail into folders.

Tip: Organise your emails into different categories folders so that it would be easier for you For example create a folder with your active Accounts, accounts that completed onboarding, folder for company announcements, your projects, etc.

Your Slack channels



Slack is used for internal communication, and we had different channels for different purposes. Some that are most useful for the onboarding specialist are:

#chrnzerorocks	Ask any ChurnZero related questions and report issues
# product-everest-certification	Ask any Everest related questions
#global-onboarding	Our Global onboarding group
#onboarding-support	Ask any onboarding questions
#onboardingjourneys	Ask onboarding journey related questions
#'global-customersuccess	Communication channel for Global Customer Success Team
#tams	CSM channel which is also useful for the onboarding team
#thanks	A place to say thank you and praise your colleagues

There are also others dedicated to specific products (#product-briteverify, #product-gridbuddy-questions_answers), regions we work in (#emea, #serviceinternational, #uk_service), hobby/fun channels (#food, #pets, #qotd) and more.

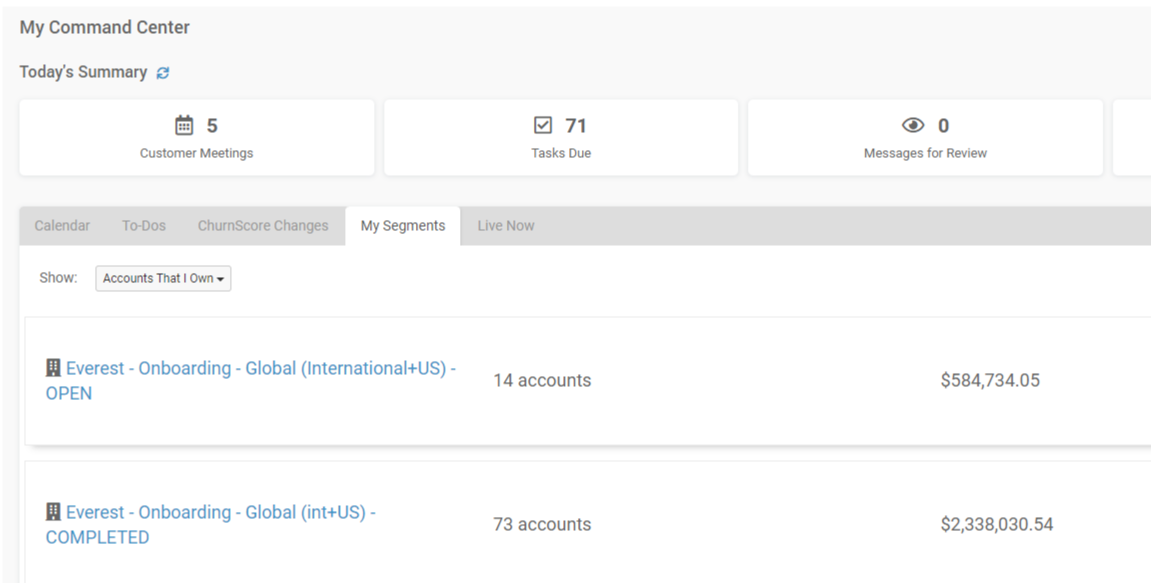
How I organize my day

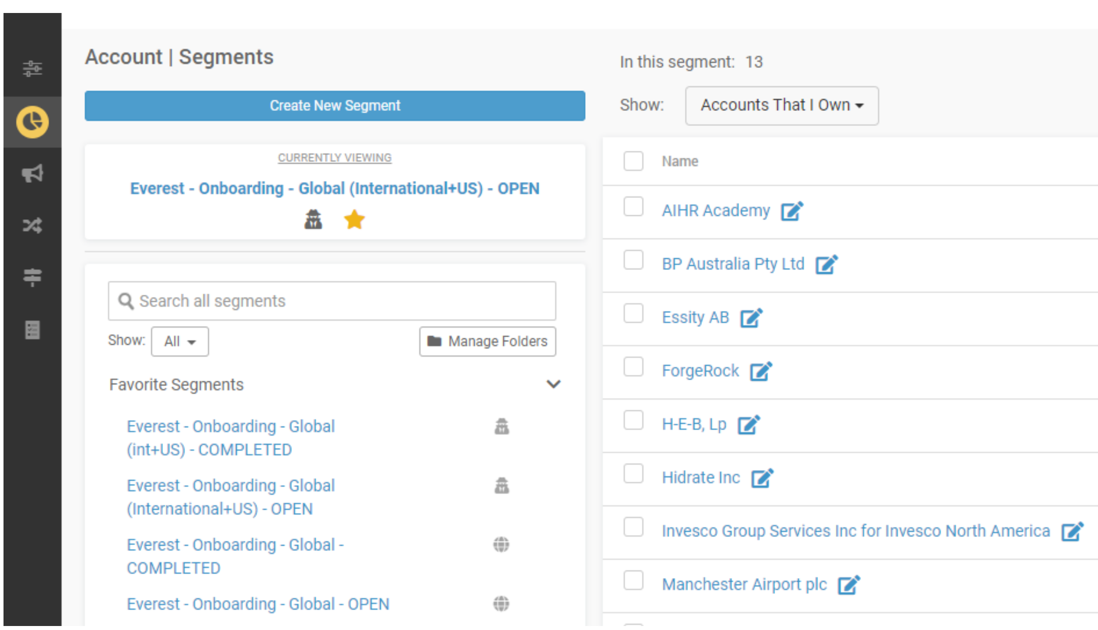
1. Workflow

Open my **Account Provisioning Document** – Organize Your Workflow Template

This a way I manage my workflow. You can find a template in the SharePoint under Documents

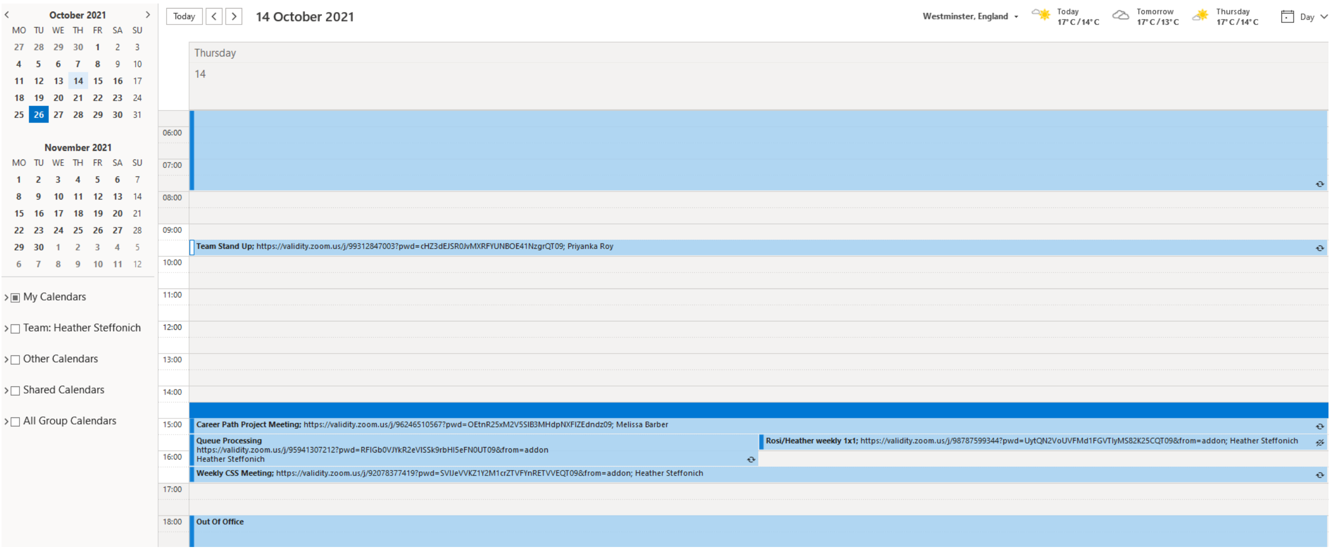
You can use the Churnzero segments or both. You can use pre-made segments or create new ones from Segments -> Accounts. You can view your segments from My Command Centre -> My Segments





2. Meetings

When I start my day I check what meeting I have scheduled. We use Outlook to manage our meeting calendar. I spend some time to prepare for my meetings if necessary (notes, etc). For example if I have 1 on 1 product training with a client I check their account and take notes before the meeting.



Types of Meetings:

- Daily meetings – Team Stand Up (daily) – with UK CSM team
- Client meetings – Product trainings, Q&A sessions, Kick off calls
- Everest Demo Group Training – every week (currently each of us do 1 in a month)
- Global Customer Success Meeting
- Service International Bi Weekly Meeting
- Office Hours (CSM meeting)
- Weekly CSS Meeting
- 1 on 1 meeting with my manager
- Queue Processing
- Other – collaborative hours (collaboration with Uk team), feel good committee meeting, catch up with colleagues; block time in your calendar for self-training, time to work on projects, etc.

Tip: Block time on your calendar to work on your projects, watch training videos, etc. It’s always good to spare some time for these kinds of activities when you are not that busy with the rest of the onboarding tasks.

3. Tasks

In the beginning of my day, I like to write a to-do list with all the things I need to complete, and this helps me organize my day easier. A way to keep track of your tasks is using the sticky notes or notepad on your computer, using Microsoft To Do app or just a pen and paper. The tasks we normally do are: check our assigned accounts, onboard new clients, transition clients who have completed their onboarding steps, troubleshoot client issues, process order and other ad-hoc duties.

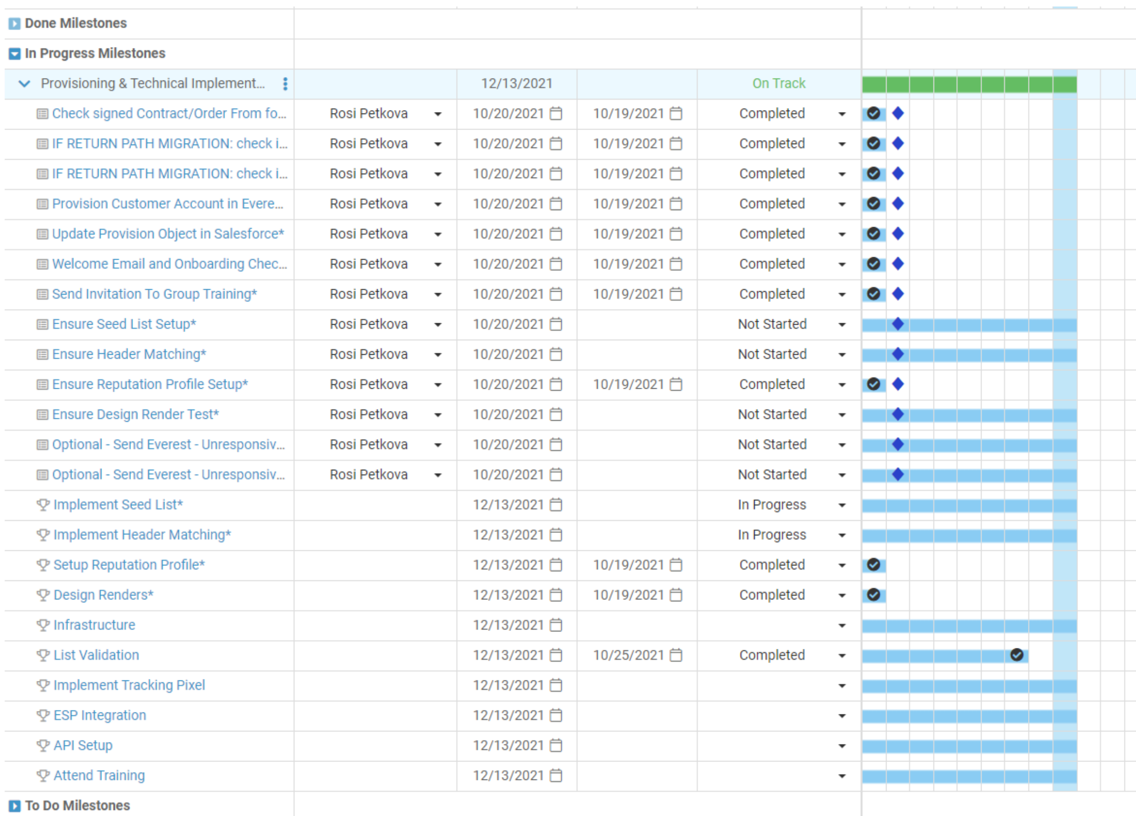
4. Projects

In onboarding we also get involved in customer success projects. There is always an opportunity to get involved and work with colleagues from other departments. We also get do projects within the onboarding team such as working on onboarding materials/videos, etc. It's important to organise your time and balance project work and the rest of your daily tasks.

Everest Account Check

Check the onboarding progress of your Everest accounts at least once or twice per week and make sure that you mark the completed onboarding steps in ChurnZero. The mandatory steps in onboarding are:

1. Seed List set up
2. Implement Header Matching
3. Design Render Test
4. Setup Reputation Profile



Done Milestones				
In Progress Milestones				
Provisioning & Technical Implement...		12/13/2021		On Track
Check signed Contract/Order From fo...	Rosi Petkova	10/20/2021	10/19/2021	Completed
IF RETURN PATH MIGRATION: check i...	Rosi Petkova	10/20/2021	10/19/2021	Completed
IF RETURN PATH MIGRATION: check i...	Rosi Petkova	10/20/2021	10/19/2021	Completed
Provision Customer Account in Evere...	Rosi Petkova	10/20/2021	10/19/2021	Completed
Update Provision Object in Salesforce*	Rosi Petkova	10/20/2021	10/19/2021	Completed
Welcome Email and Onboarding Chec...	Rosi Petkova	10/20/2021	10/19/2021	Completed
Send Invitation To Group Training*	Rosi Petkova	10/20/2021	10/19/2021	Completed
Ensure Seed List Setup*	Rosi Petkova	10/20/2021		Not Started
Ensure Header Matching*	Rosi Petkova	10/20/2021		Not Started
Ensure Reputation Profile Setup*	Rosi Petkova	10/20/2021	10/19/2021	Completed
Ensure Design Render Test*	Rosi Petkova	10/20/2021		Not Started
Optional - Send Everest - Unresponsiv...	Rosi Petkova	10/20/2021		Not Started
Optional - Send Everest - Unresponsiv...	Rosi Petkova	10/20/2021		Not Started
Implement Seed List*		12/13/2021		In Progress
Implement Header Matching*		12/13/2021		In Progress
Setup Reputation Profile*		12/13/2021	10/19/2021	Completed
Design Renders*		12/13/2021	10/19/2021	Completed
Infrastructure		12/13/2021		
List Validation		12/13/2021	10/25/2021	Completed
Implement Tracking Pixel		12/13/2021		
ESP Integration		12/13/2021		
API Setup		12/13/2021		
Attend Training		12/13/2021		
To Do Milestones				

Log into the account and check if the client completed any of the tasks listed in Churn Zero. Check Pre-Send - List Validation and Design & Content; In-Flight - Inbox Placement; Monitoring - Reputation; Engagement; Infrastructure. You can also check when was the last time the client logged in from My Everest -> Account Settings -> Activity Log

Account Onboarding

Account Provisioning

One of the main things we do as onboarding specialists is to provision accounts. We provision both data and email. The onboarding process for email (Everest) account is 60 days and for data clients – 30 days.

What do you need to start the Everest account provisioning:

- Open ChurnZero
- Open Everest Admin
- Open Onboarding calendar in SharePoint
- Open Opportunity in Salesforce
- Open Contract in Salesforce
- Open Onboarding Contact from the Opportunity
- Open Provisions in Salesforce
- Check if it's migrations - open RP Internal Tools (from My Apps)

Have a look at the Step by Step Provisioning Guide and the Onboarding Everest Guide

Kick-Off Call

All clients paying over 40k USD per year get an introduction call. Find more about the kick-off calls here: Kick-Off Call

You need to create a TimeTrade Invitation that we send to the client with the welcome email. Once the client schedules the call you will receive an email and you need to add the meeting in your Outlook calendar. Then you follow the steps below. Just note that the PowerPoint Presentation and the script are just for guidance only and we can customize the kick-off call to fit the customers needs.

Steps:

- Prepare the PowerPoint Presentation – Template
- Follow the script – Template
- If you already have a CSM assigned invite them to join you on the call
- After the client attends the call, complete the step in Churn Zero
- Send a follow up play/email.

Transitioning a client

After the client has completed the mandatory onboarding steps, we can complete the journey and transition the account (previously called offboarding) to either Support (when the account is below 40k) or to a dedicated CSM (when the client is paying over 40k per year).

Fail a journey

When the client doesn't complete all the mandatory steps in onboarding in 60 days (30 days for data clients and BriteVerify clients) we have to fail the onboarding journey in Churnzero.

- Reasons – There might be multiple reasons for this to happen - client is unresponsive to all the emails we send, client is not ready and doesn't want to begin onboarding now, Validity is not a priority, etc.

- Steps:

1. Check the account
2. Start the Churnzero play – always start the play first then fail the journey otherwise you won't be able to send the play to the client after the journey is failed.
3. Fail the journey
4. Update *Opportunity* with Notes – Go to *Custom Tables* in ChurnZero and find the correct *Opportunity*. Fill out the *Onboarding Info* – set the *Onboarding Journey Failed* to True, choose the *Onboarding Journey Failed Date* and *Failed Journey Reason*, put the *Failed Journey Notes*. This will automatically update the opportunity in Salesforce.
5. If the account is over 40k inform the CSM Manager that the journey is failed

Troubleshooting

In onboarding we often have to troubleshoot issues for our clients. We have to troubleshoot when a client sends us an email with queries about Everest or we see the issues ourselves when we do our regular account check.

There are a few ways how we can assist the client:

- ***Open a support ticket***
  Open a support ticket from Zendesk or email them at support@validity.com
- ***Check existing support tickets***
  Search for similar tickets in Zendesk that can help you find an answer to the client's question.
- ***Use the Validity Help Center***
- ***Check the Slack Channels***
- ***Ask for help***

Useful resources:

Everest Q&A

Everest Account Troubleshooting

Order Processing

When the sales team closes a sale (new business) or renew an exciting contract, the order comes to us to provision the account or renew the account access respectively. You can find the orders in the Provisions in Salesforce. There are four type of order queues we work on – **Provisioning Queue**, **Provisioning Queue VES**, **Amendments to be Processed**, **Amendments to be Processed VES.** For some Validity solutions we only renew contract and for other we both renew and provision new accounts. For example, we do not provision new accounts for Return Path and 250ok. You can see more in the table below:

Provision & Renewal	Renewal Only
BriteVerify	250ok
Everest	Return Path
DemandTools (and DT Bundle)	Return Path - Certification only
GridBuddy Cloud (and VSP bundle)	

For more detailed information on how to process orders see the SharePoint document: Order Processing – How to Do

Useful Links

Onboarding Team Capacity Planner

Onboarding Team SharePoint Site

Onboarding Global Team Resources

- Email Solutions resources
- Data Solutions resources
- Order Processing resources

Onboarding Team Career Paths

- Onboarding Specialist Job Description
- Senior Onboarding Specialist Job Description