ONBOARDING EVEREST GUIDE

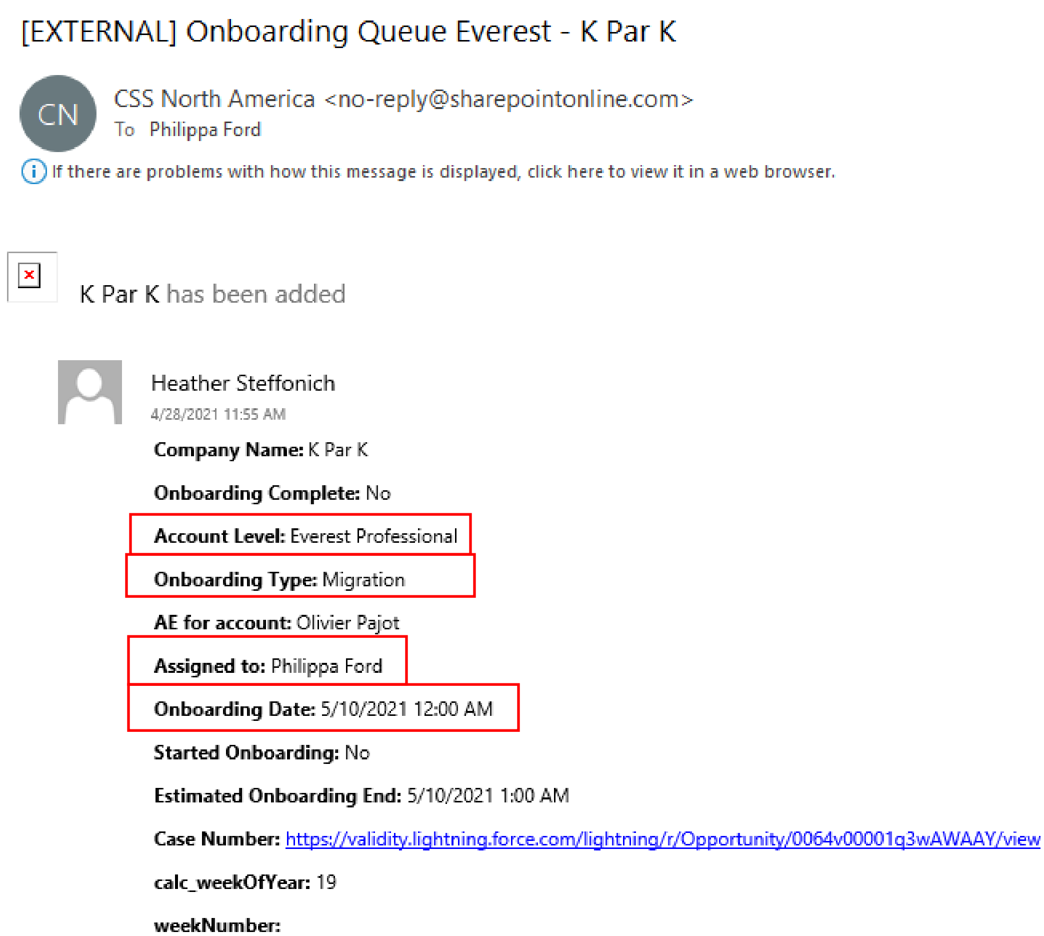
Philippa Ford
VALIDITY INC Philippa.ford@validity.com

Contents

I) Assigned an Everest account

You will receive an Alert if you have those setup (if not here is the guide to set those up: https://crmfusion.sharepoint.com/:v:/r/sites/nacss/Shared%20Documents/1.%20CSS%20Global_TEAM/Setting%20Alerts%20for%20the%20Onboarding%20Queues.mp4?csf=1&web=1&e=SVtooM)

The email Alert that comes from the Onboarding Everest Queue on SharePoint will look like this:



[EXTERNAL] Onboarding Queue Everest - K Par K

CN CSS North America <no-reply@sharepointonline.com>
To Philippa Ford

If there are problems with how this message is displayed, click here to view it in a web browser.

K Par K has been added

Heather Steffonich
4/28/2021 11:55 AM

Company Name: K Par K

Onboarding Complete: No

Account Level: Everest Professional

Onboarding Type: Migration

AE for account: Olivier Pajot

Assigned to: Philippa Ford

Onboarding Date: 5/10/2021 12:00 AM

Started Onboarding: No

Estimated Onboarding End: 5/10/2021 1:00 AM

Case Number: https://validity.lightning.force.com/lightning/r/Opportunity/0064v00001q3wAWAAY/view

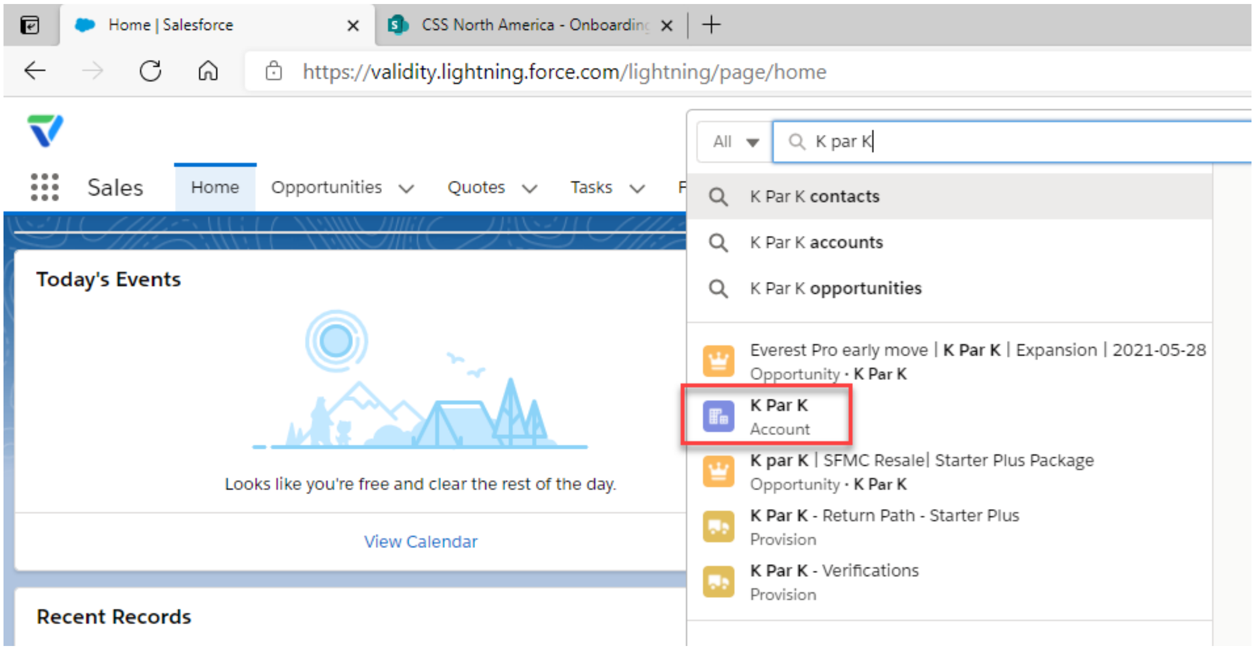
calc_weekOfYear: 19

weekNumber:

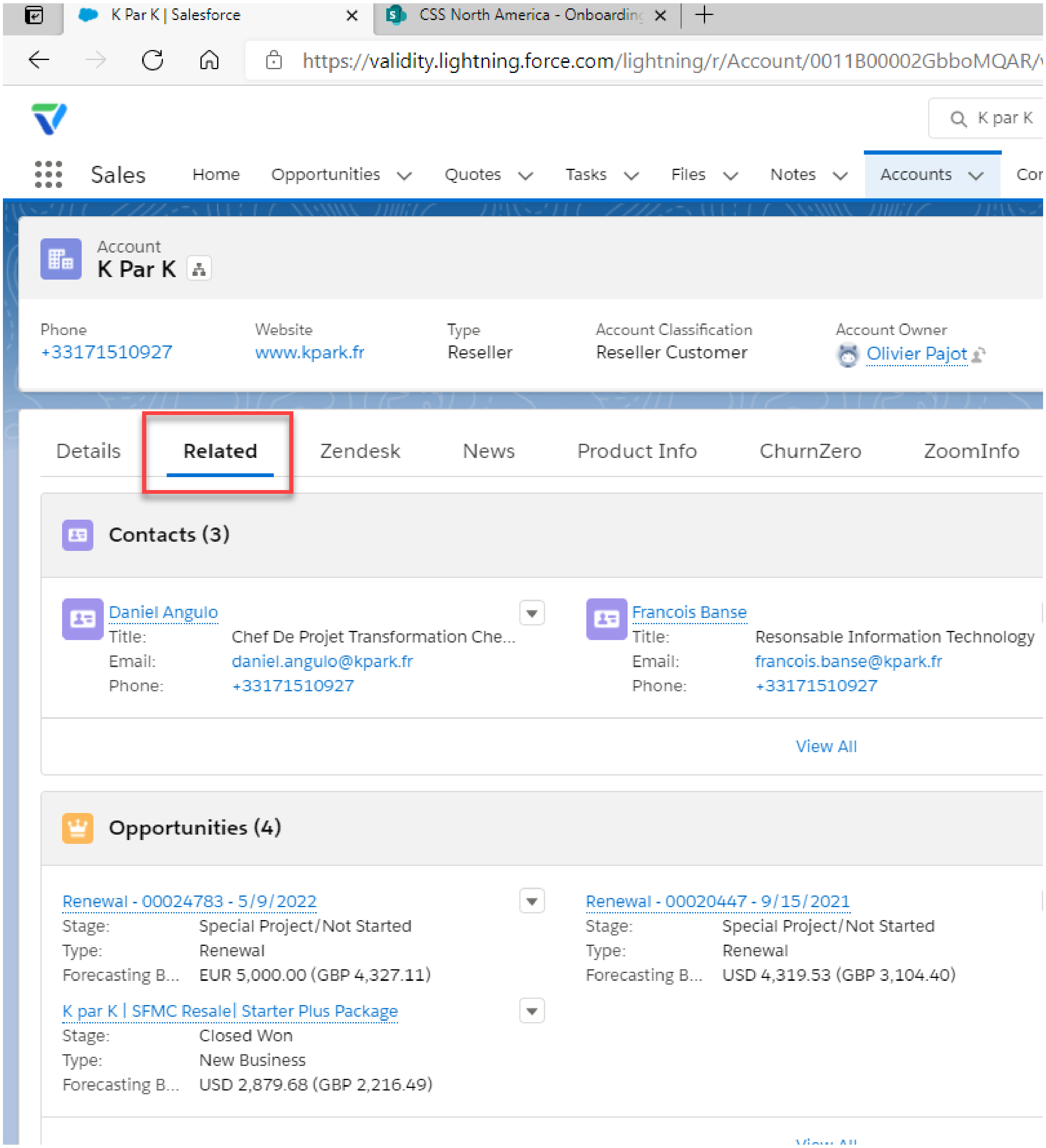
Key points

Now check the information, log into Salesforce: Home | Salesforce

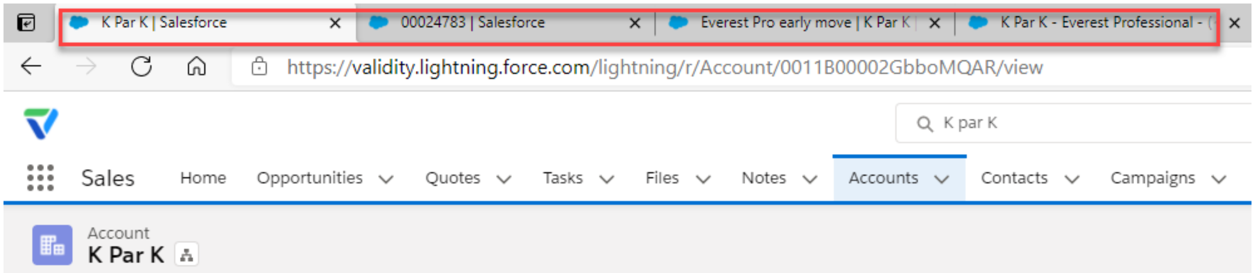
Look up the account:



Go to the Related tab in Salesforce.



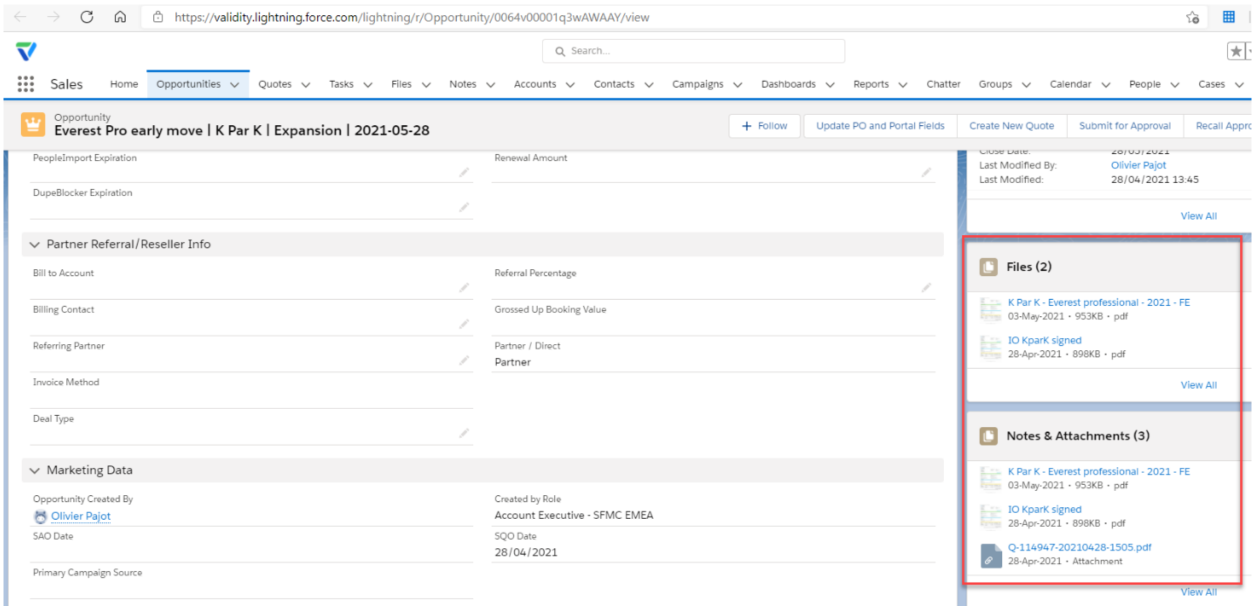
You will need to Open in a new tab the Opportunity, Contract and Provision that all relate to the Everest product:



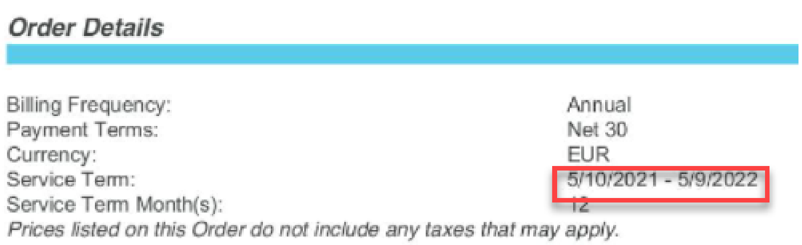
Account > Contract > Opportunity > Provision

II) Checking account information

Open the physical copy of the contract, you will find this in the files section on the right-hand side in the opportunity.



When opened, you need to check the start date, the Service they have purchased, and the allotments:



Order Details

Billing Frequency:	Annual
Payment Terms:	Net 30
Currency:	EUR
Service Term:	5/10/2021 - 5/9/2022
Service Term Month(s):	12

Prices listed on this Order do not include any taxes that may apply.

Service	Description	Quantity	*Unit Price	*Disc. Percent	*Discounted Unit Price	Total Price
Validity Everest - Professional	Per Edition	1	16,512.96	0.08	16,500.00	EUR 16,500.00
One-Time Discount	One-Time Discount	1	-5,000.00	0.00	-5,000.00	EUR -5,000.00

Order Total:	EUR 11,500.00

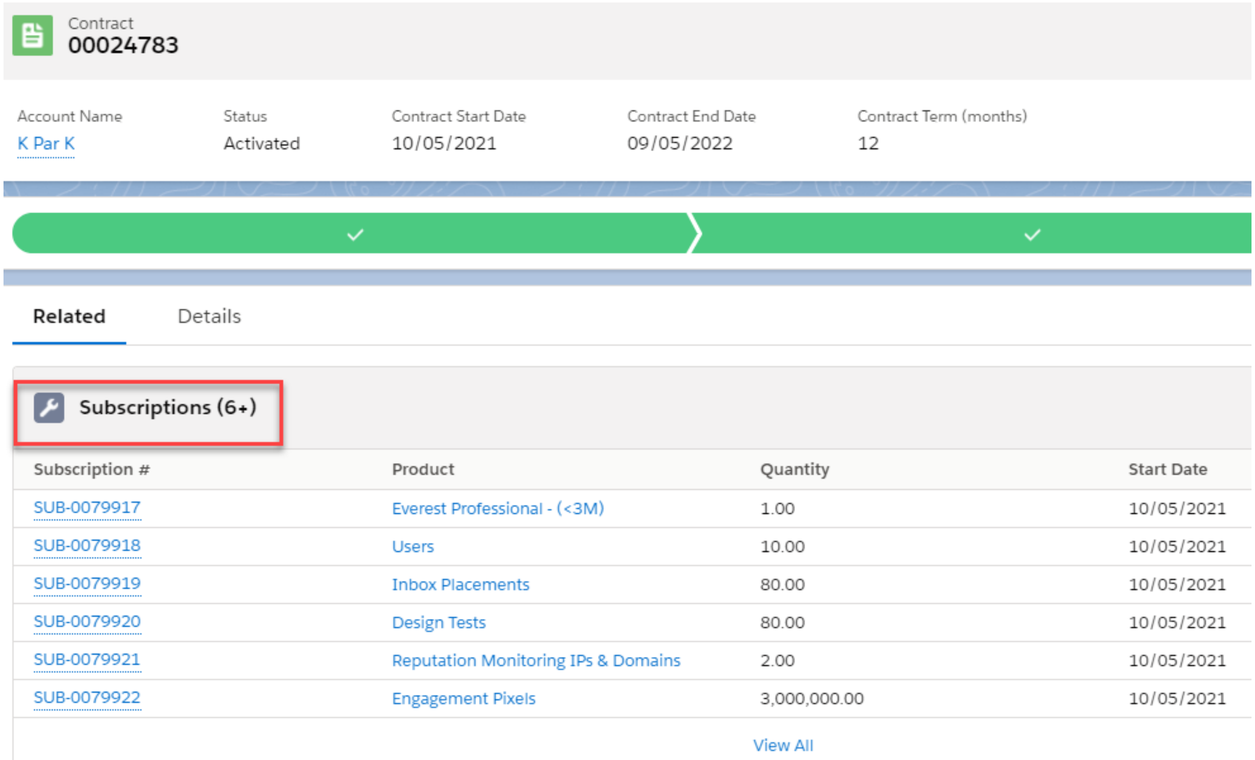
Total Discounted Amount included in Order total calculation: EUR 12.96

*The amount shown has been rounded for display purposes. As many as eight decimal places may be present in the actual amount. Total Price was calculated using the actual amount, rather than the amount displayed, and is the true and binding Total Price for this Order.

Included Allotments

Allotment	Total Quantity
Users	10
Inbox Placements	80
Design Tests	80
Reputation Monitoring IPs & Domains	2
Engagement Pixels	3,000,000
Verifications	500,000

Check these against, your contract tab (under subscriptions).



Contract
00024783

Account Name	Status	Contract Start Date	Contract End Date	Contract Term (months)
K Par K	Activated	10/05/2021	09/05/2022	12

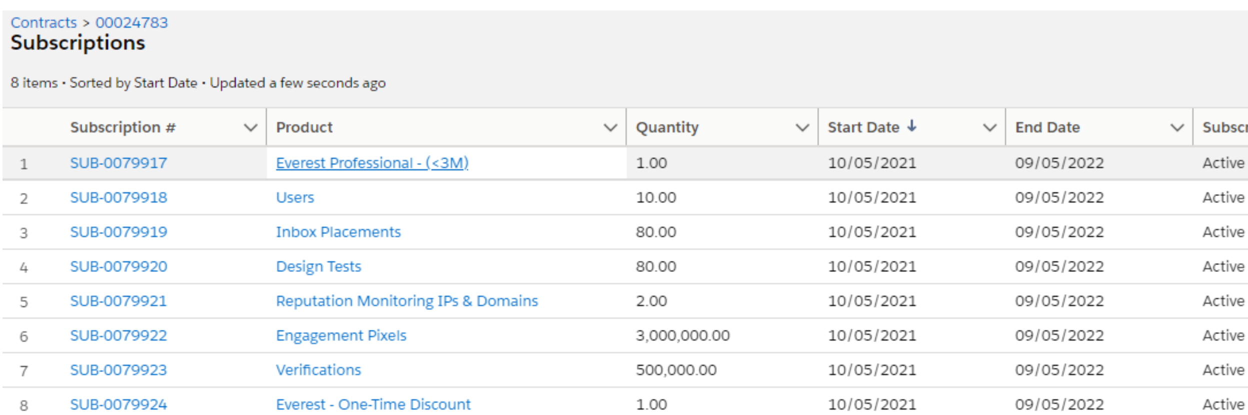
Related | Details

Subscriptions (6+)

Subscription #	Product	Quantity	Start Date
SUB-0079917	Everest Professional - (<3M)	1.00	10/05/2021
SUB-0079918	Users	10.00	10/05/2021
SUB-0079919	Inbox Placements	80.00	10/05/2021
SUB-0079920	Design Tests	80.00	10/05/2021
SUB-0079921	Reputation Monitoring IPs & Domains	2.00	10/05/2021
SUB-0079922	Engagement Pixels	3,000,000.00	10/05/2021

View All

If next to Subscriptions it says +6 then you will need to click on view all, as some lines will be hidden.



Contracts > 00024783
Subscriptions

8 items • Sorted by Start Date • Updated a few seconds ago

	Subscription #	Product	Quantity	Start Date	End Date	Subscr
1	SUB-0079917	Everest Professional - (<3M)	1.00	10/05/2021	09/05/2022	Active
2	SUB-0079918	Users	10.00	10/05/2021	09/05/2022	Active
3	SUB-0079919	Inbox Placements	80.00	10/05/2021	09/05/2022	Active
4	SUB-0079920	Design Tests	80.00	10/05/2021	09/05/2022	Active
5	SUB-0079921	Reputation Monitoring IPs & Domains	2.00	10/05/2021	09/05/2022	Active
6	SUB-0079922	Engagement Pixels	3,000,000.00	10/05/2021	09/05/2022	Active
7	SUB-0079923	Verifications	500,000.00	10/05/2021	09/05/2022	Active
8	SUB-0079924	Everest - One-Time Discount	1.00	10/05/2021	09/05/2022	Active

Now do your first check against the physical contract:

Physical Contract	Subscriptions
Contract Start/End date 10/05/21-09/05/22	Contract Start/End date 10/05/21-09/05/22
Users 10	Users 10
Inbox Placement 80	Inbox Placement 80
Design Test 80	Design Test 80
Reputation 2	Reputation 2
Pixel 3,000,000	Pixel 3,000,000
Verifications 500,000	Verifications 500,000

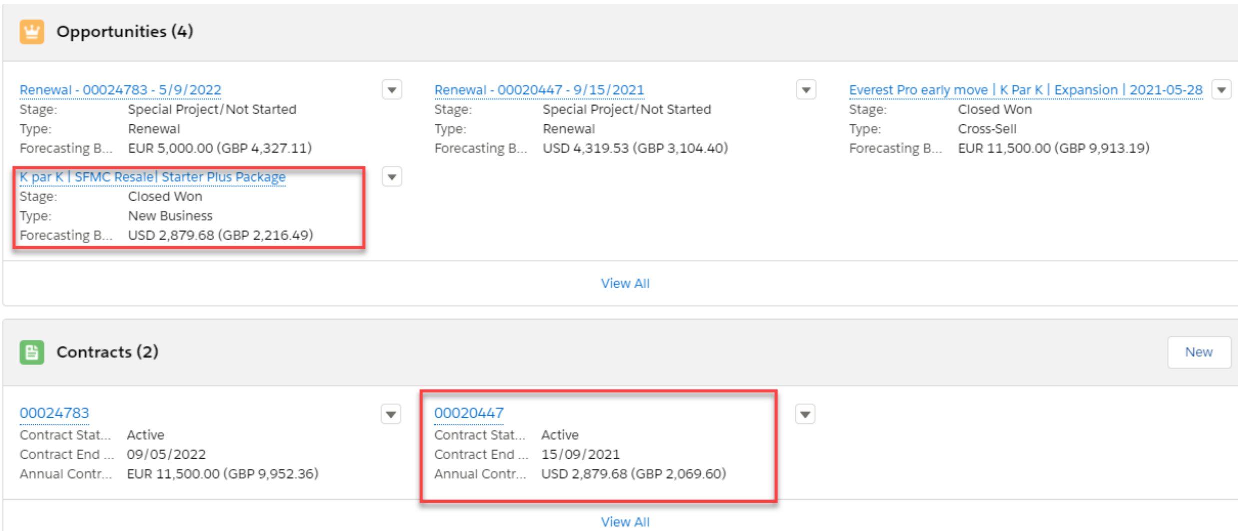
You will need all this information for provisionning into Everest Admin later. Also make a note if they have any special service such as Professional Service, Guided Experience…

- If for some reason they do not match, contact the AE (to look for who the AE is you can see it on your initial email alert, or the opportunity owner, in this example it is Olivier Pajot)
- If all matches continue to Step 3

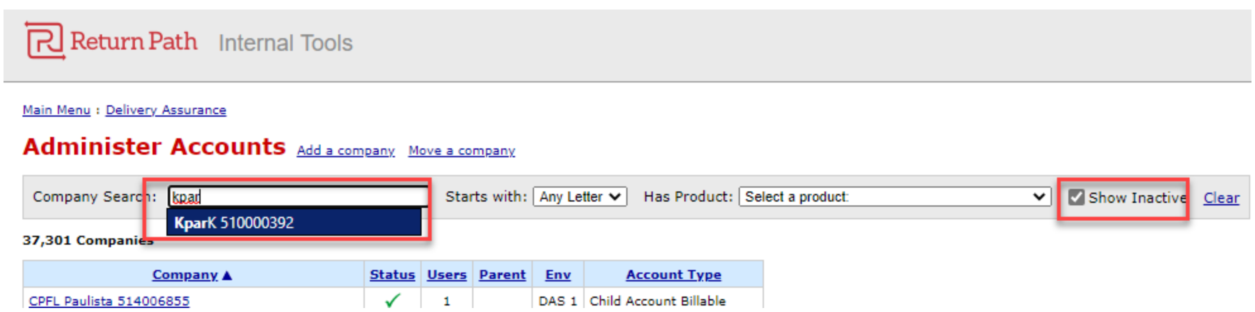
III) Migration account

You need to check if the account is a Migrating account (from either Return Path Platform or 250ok).

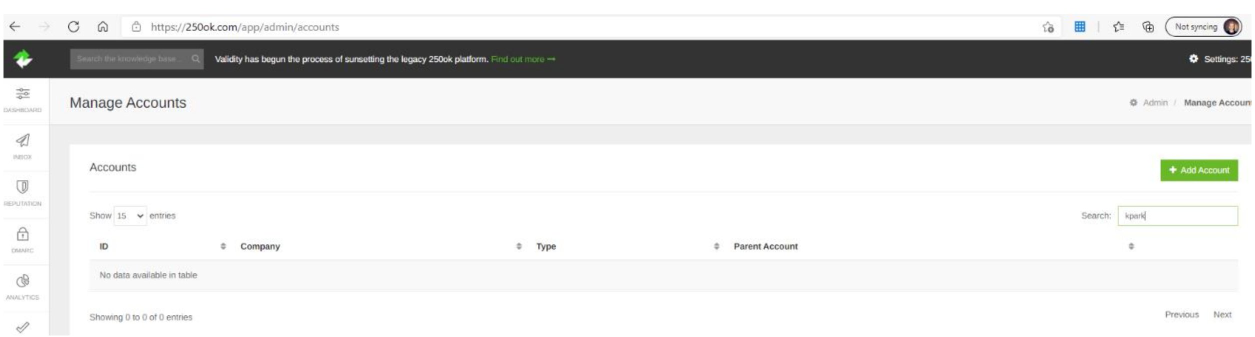
Have a look into the Salesforce account if they have previous contracts or previous opportunities for those products:



And you can login to Return Path & 250ok and search for the account name, see if anything pops up.



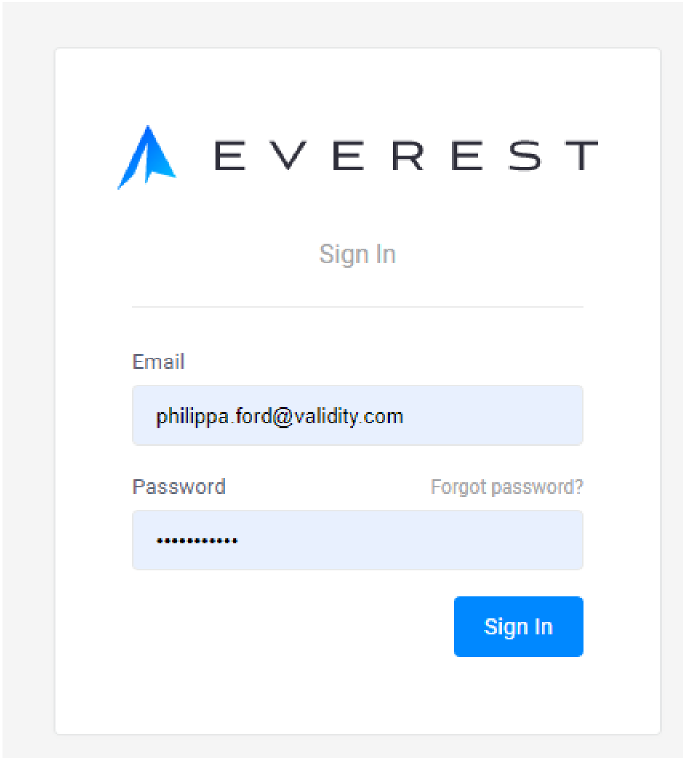
*make sure "show inactive" Is ticked.



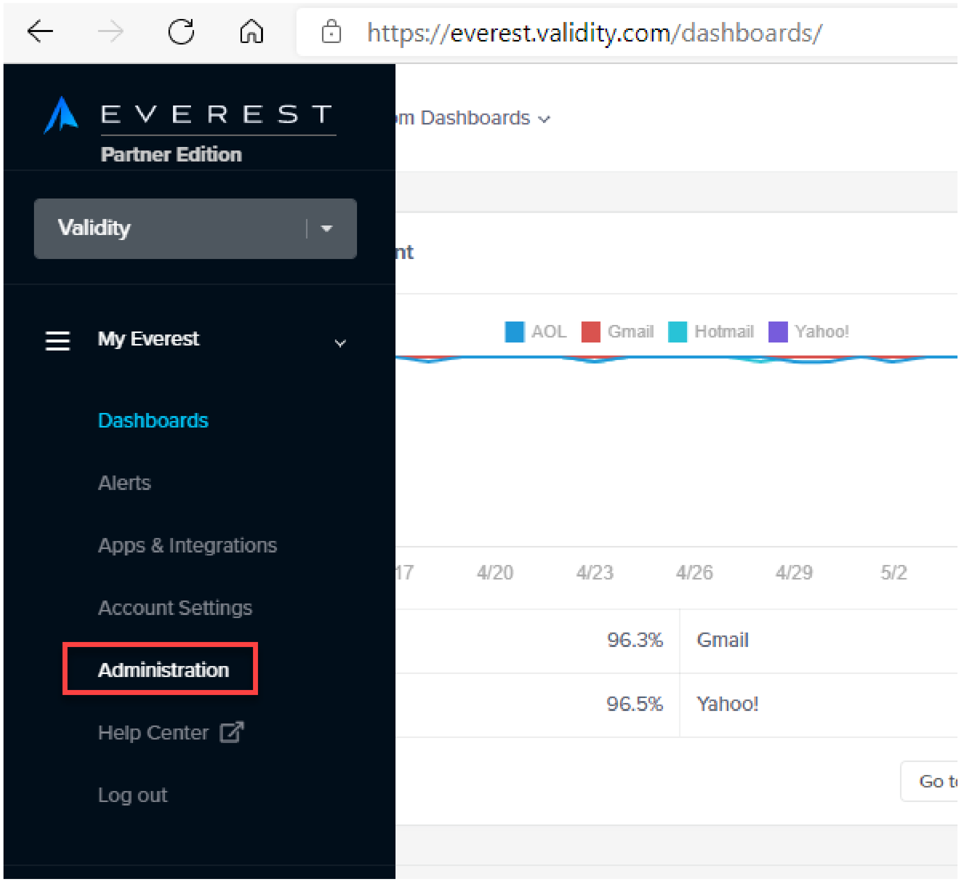
So I know this client is a migration from Return Path.

IV) Provisioning in Everest

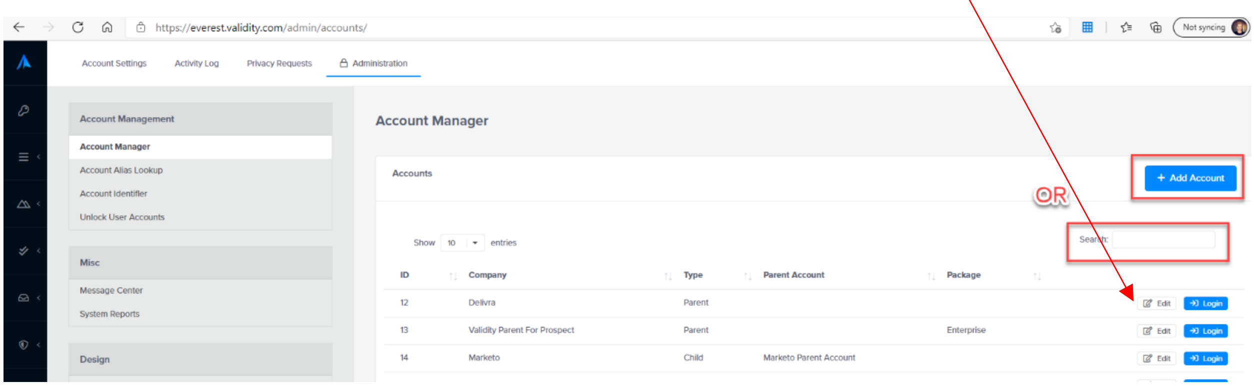
Login to Everest [Login: Validity]



Go to Administration



- If it is a new account click on the blue + Add Account
- If it is a Migration, seach the name of your account, when found click "Edit"

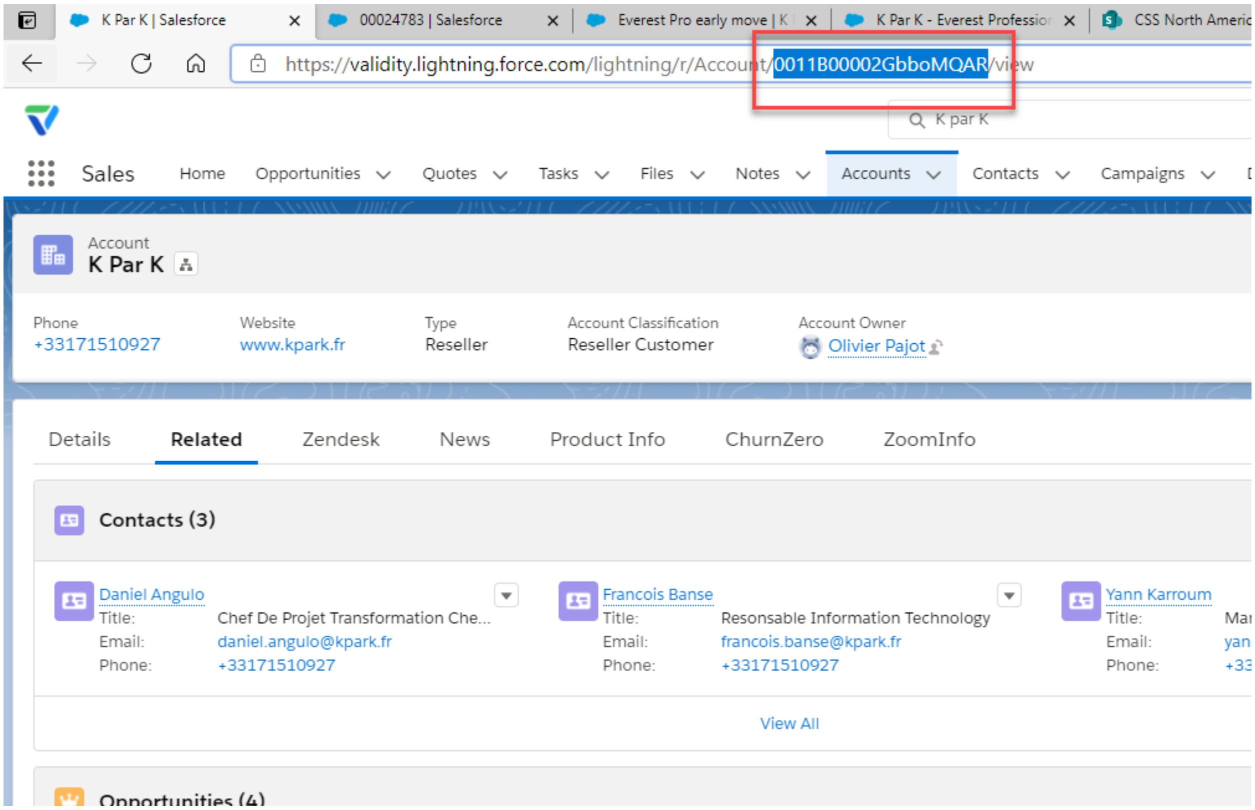


Once you are onto the Add Account or Edit Account page, you will need to fill in as much detail as possible and to match it across Salesforce, the contract (if migrating account Return Path & 250ok)

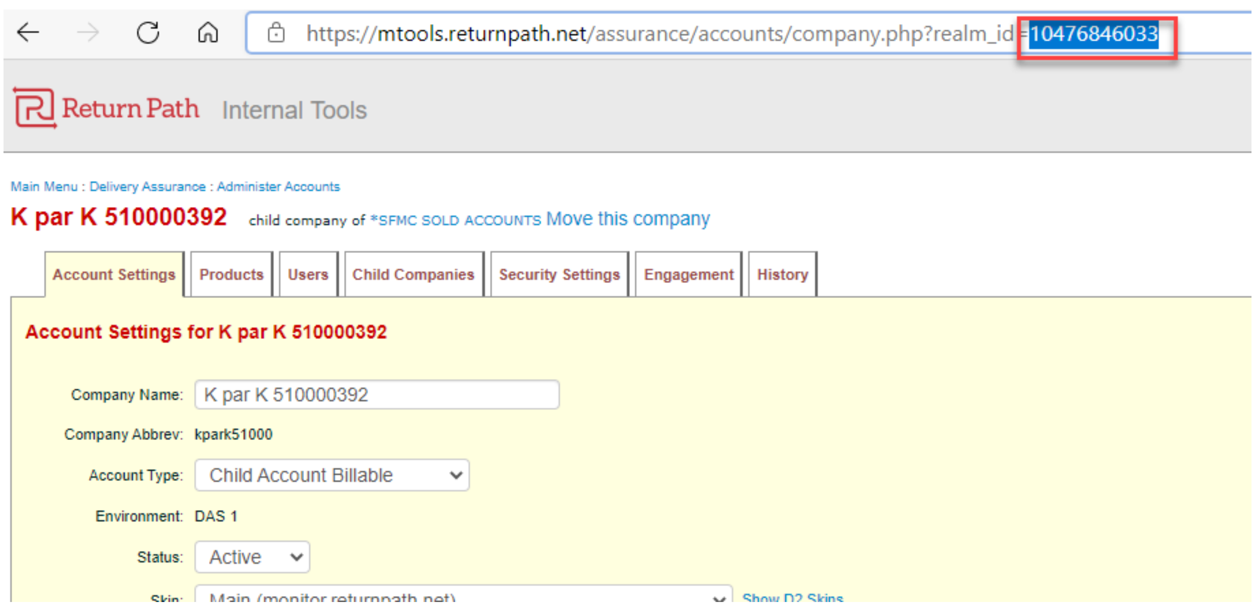
Account Name: K par K (make it match across all platforms)

Parent Account: Parent Account

Salesforce ID: piece of code you will find on the salesforce account page in the url



External ID: is the Return Path realm ID (migrating accounts only) Again piece of code in the url on the return path account page



Include Global Stats: Yes (always unless stated on the contract)

Edition: see subscriptions on contract in Salesforce

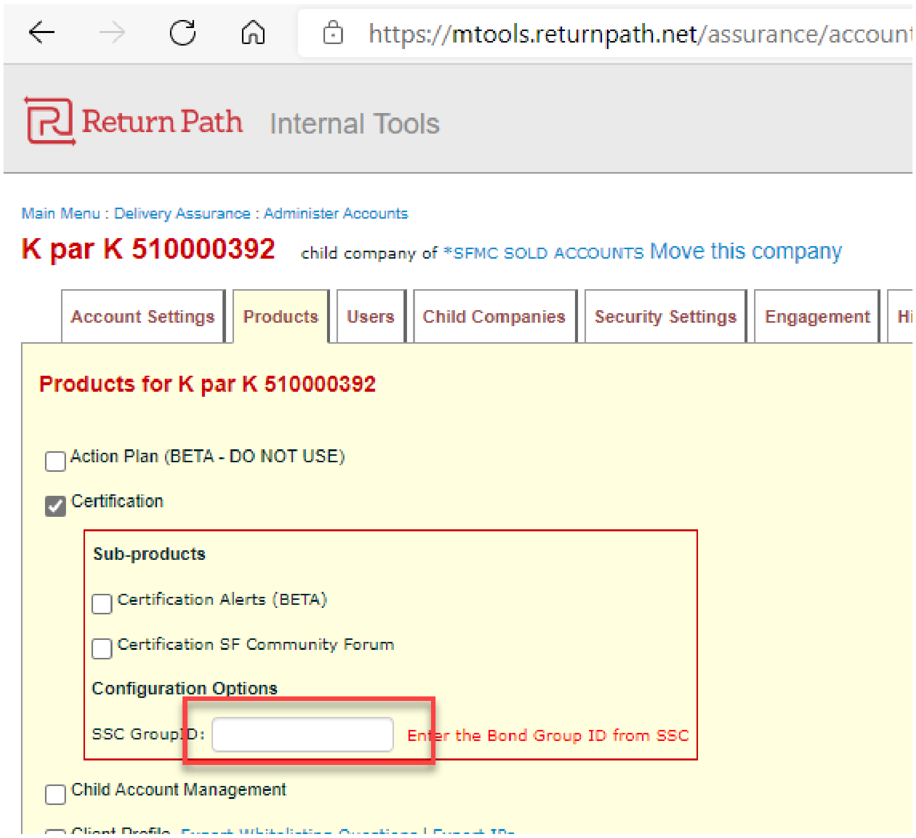
Volume tier: see subscriptions on contract in Salesforce

Start Date: Contract start date

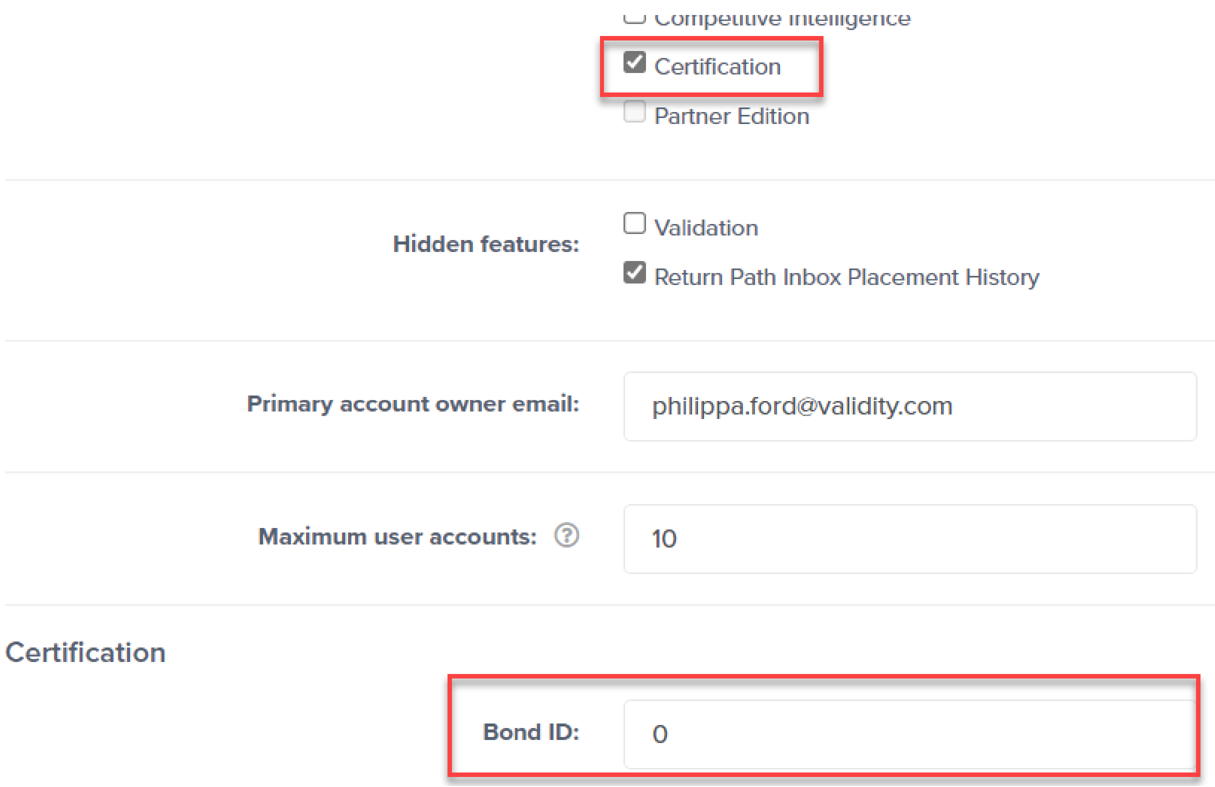
End Date: Contract end date

Add-ons: Check if they have any additional services from the contract, tick as appropriate

- Certification: - If they are a migrating account and have it on their contract, grab the Bond ID from Return path:

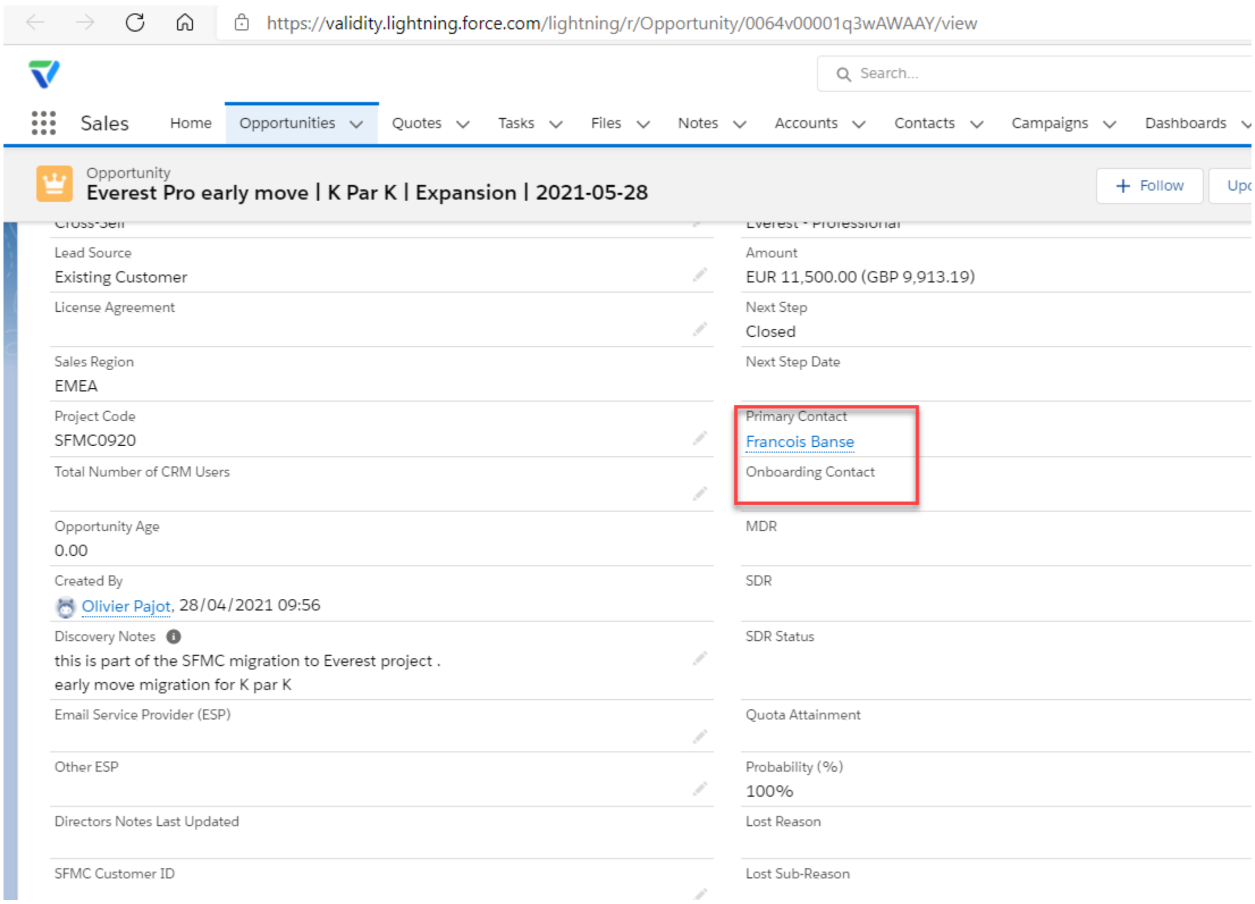


And tick Certification in Everest and add that number in Everest:



- If they have certification on the contract but you do not have the Bond ID yet, chatter the Certification team on the salesforce opportunity to let them know they are a new certification client.

Primary account owner: Onboarding contact/primary contact email address



Add in their email address if it's a new account in Everest.

If it is a Migrating account and the owner is different, then leave it as is and fill out the rest of the subscriptions and we can change it after.

Maximum user accounts: see subscriptions on contract in Salesforce

Placement: see subscriptions on contract in Salesforce

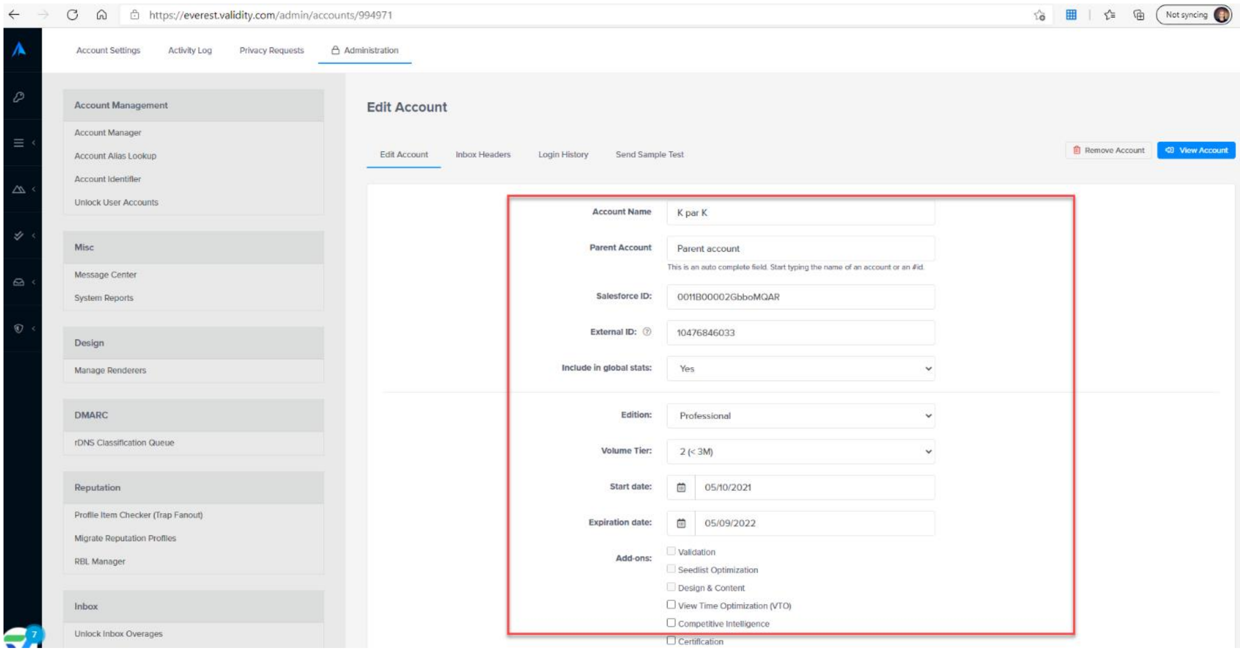
Reputation: see subscriptions on contract in Salesforce

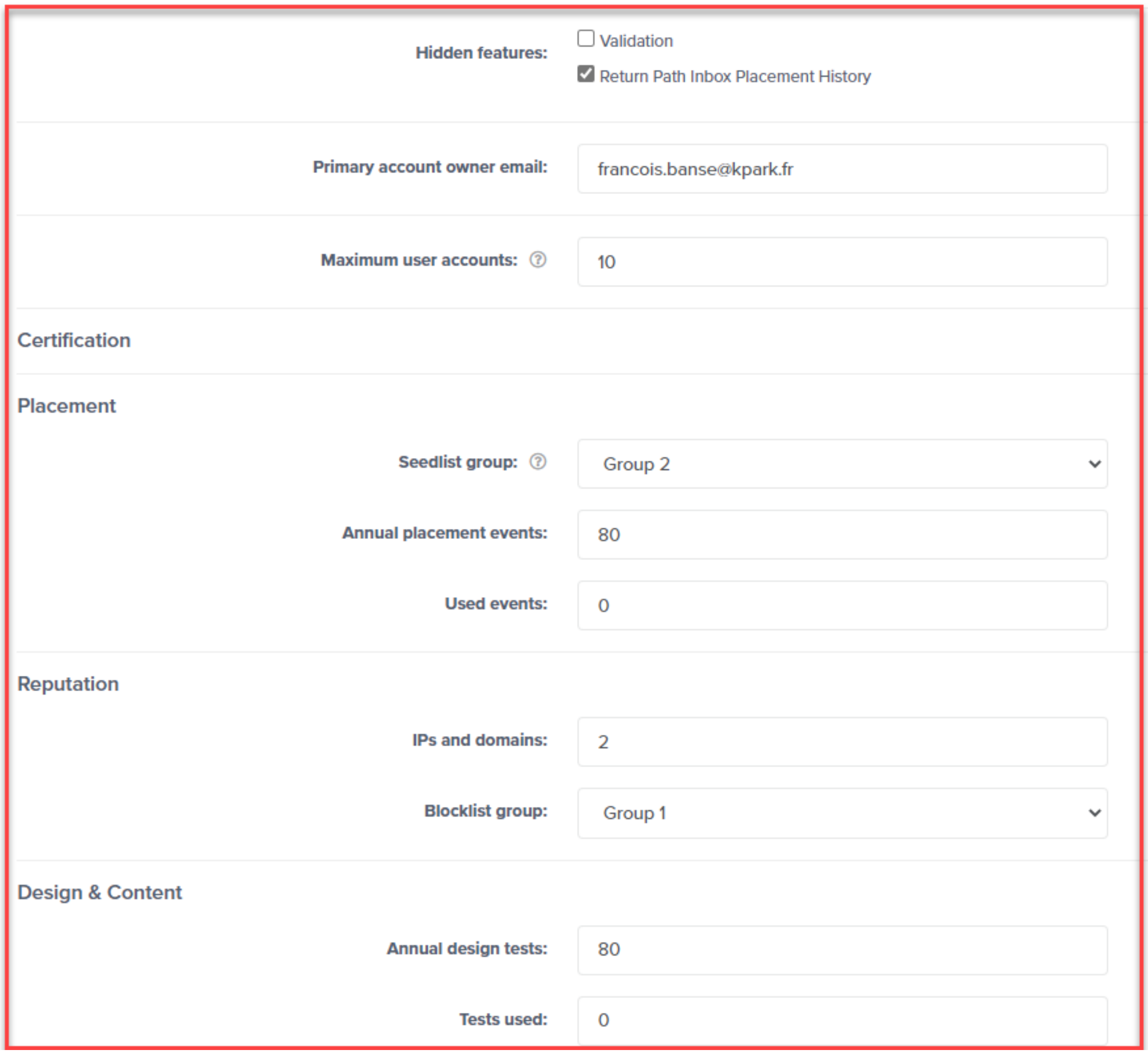
Design & Content: see subscriptions on contract in Salesforce

Engagement: see subscriptions on contract in Salesforce

Validation: see subscriptions on contract in Salesforce

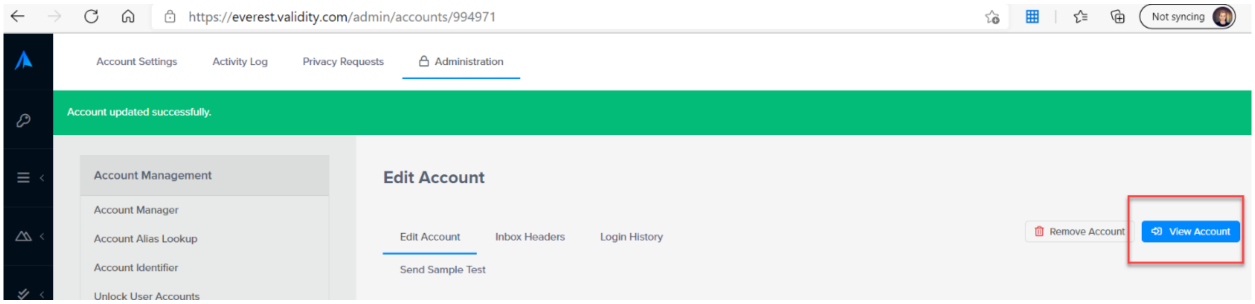
When all is completed it should look like this:


https://everest.validity.com/admin/accounts/994971
Not syncing
Account Settings
Activity Log
Privacy Requests
Administration
Account Management
Account Manager
Account Alias Lookup
Account Identifier
Unlock User Accounts
Misc
Message Center
System Reports
Design
Manage Renderers
DMARC
rDNS Classification Queue
Reputation
Profile Item Checker (Trap Fanout)
Migrate Reputation Profiles
RBL Manager
Inbox
Unlock Inbox Overages
Edit Account
Edit Account
Inbox Headers
Login History
Send Sample Test
Remove Account
View Account
Account Name
K par K
Parent Account
Parent account
This is an auto complete field. Start typing the name of an account or an #id.
Salesforce ID:
0011B00002GbboMQAR
External ID:
10476846033
Include in global stats:
Yes
Edition:
Professional
Volume Tier:
2 (< 3M)
Start date:
05/10/2021
Expiration date:
05/09/2022
Add-ons:
Validation
Seedlist Optimization
Design & Content
View Time Optimization (VTO)
Competitive Intelligence
Certification

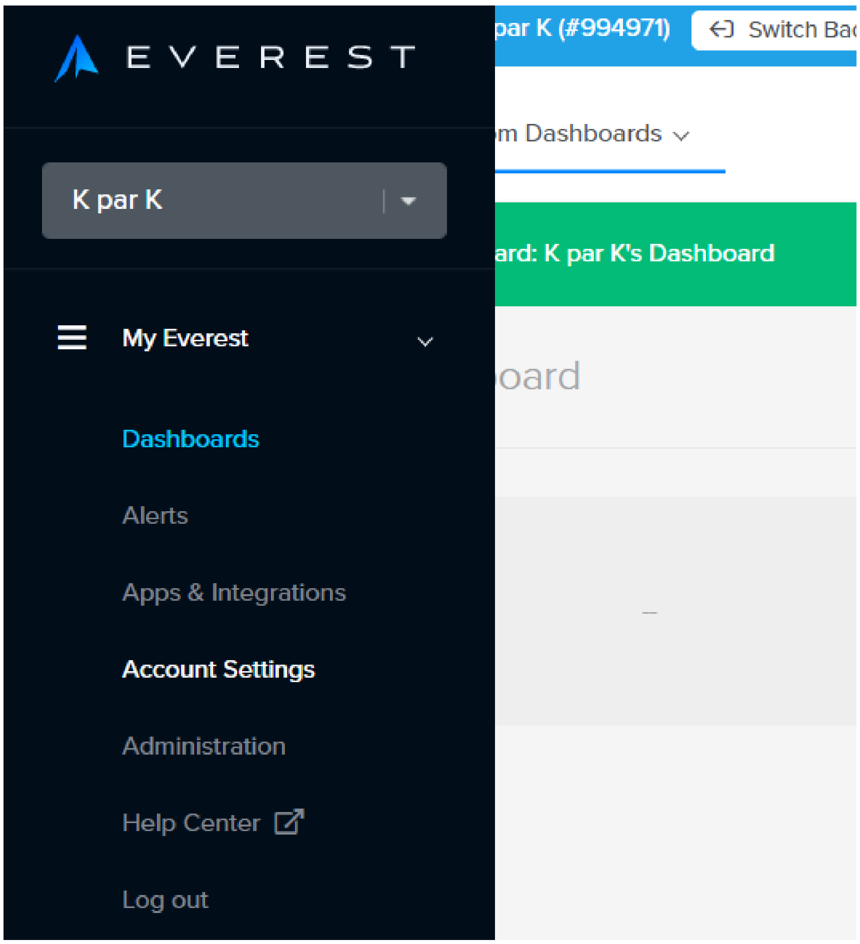


Then click Save.

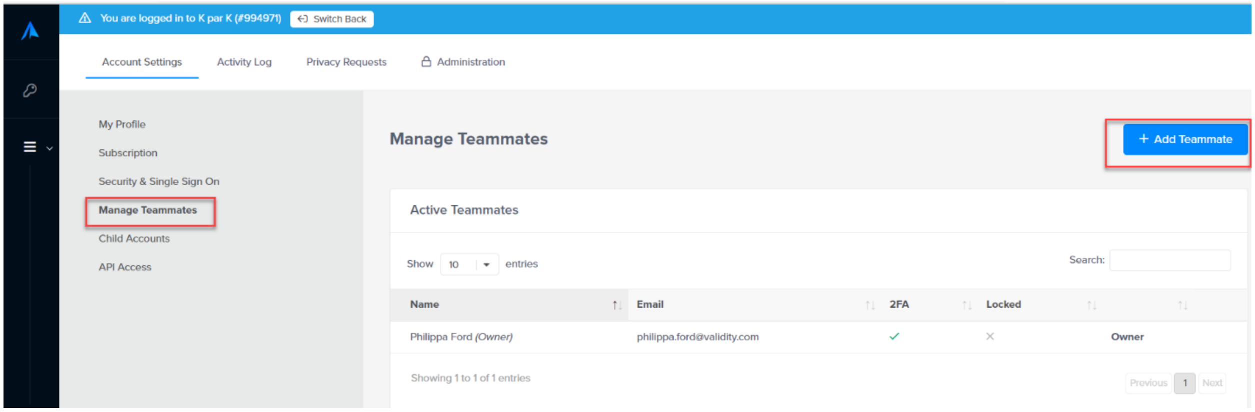
IF YOU NEED TO CHANGE THE "PRIMARY ACCOUNT OWNER" because it is a migrating account, Click on View account



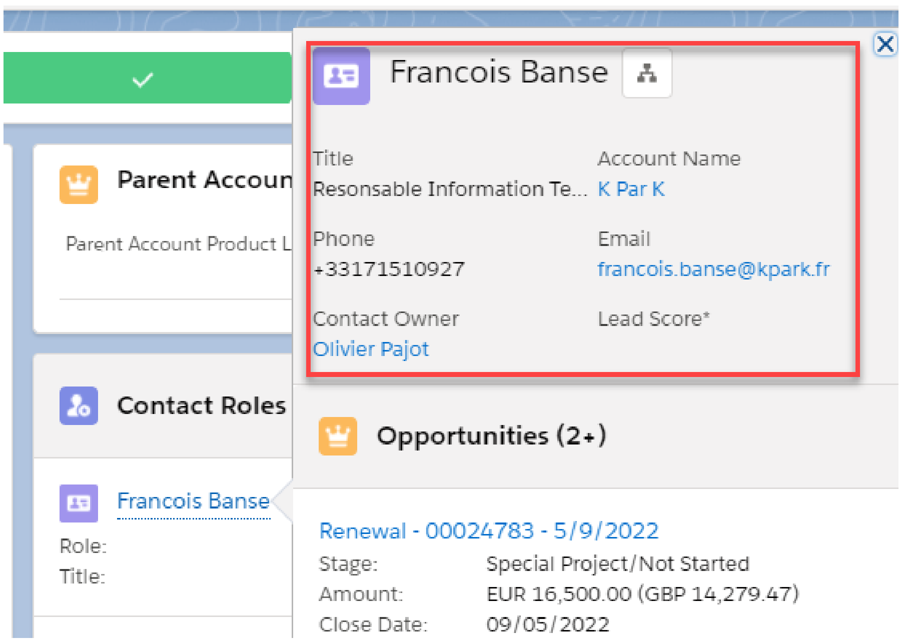
Go to account settings:

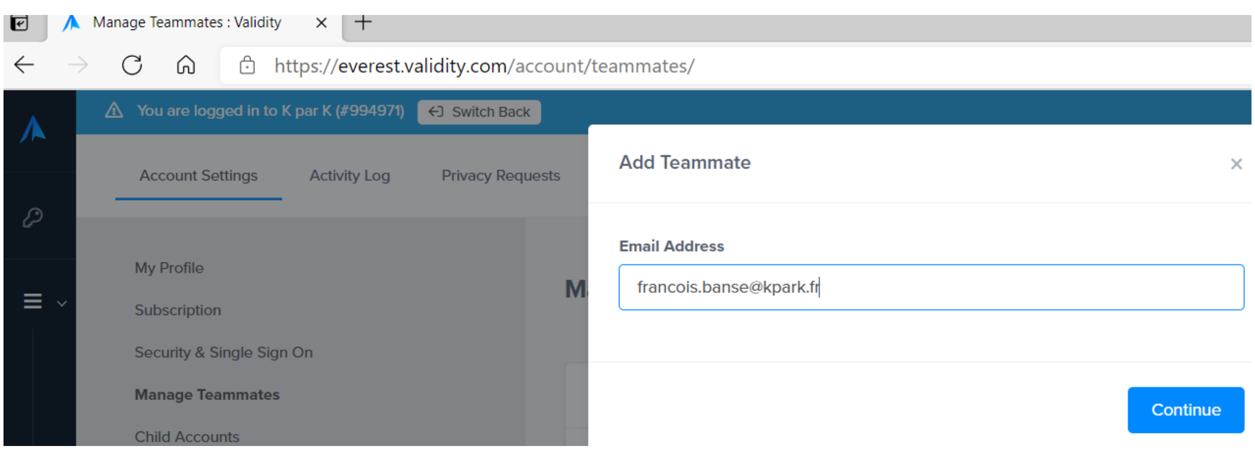


And Manage Teammastes > + Add Teammates

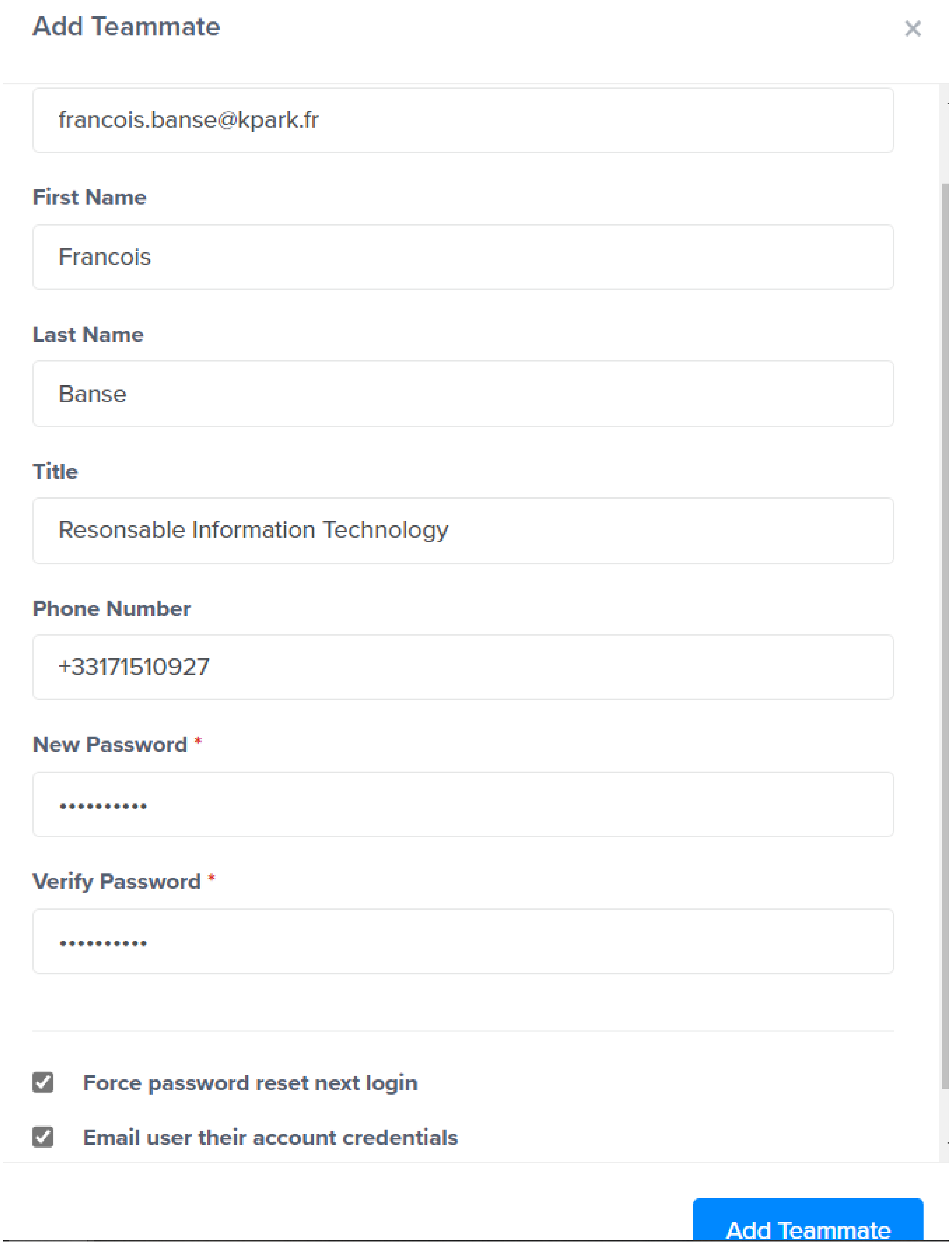


Add the email address that is in Salesforce:



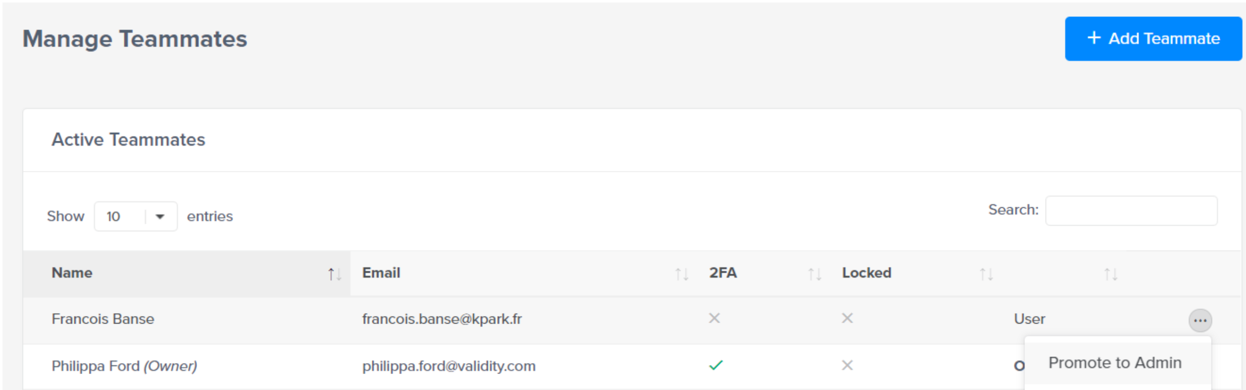


And add in all the other details



And make sure you tick the last 2 boxes.

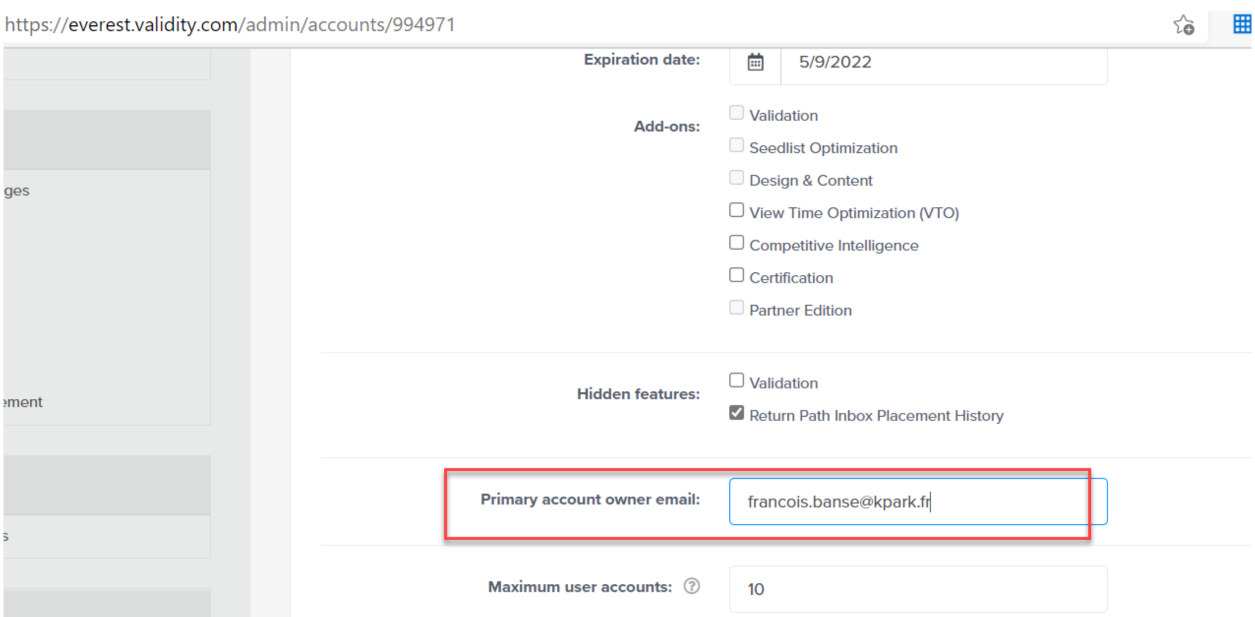
Click Add Teammate



Click on the 3 dots "…" next to the name you've just added and promote to admin.

Then go back to Everest Admin and Edit the account

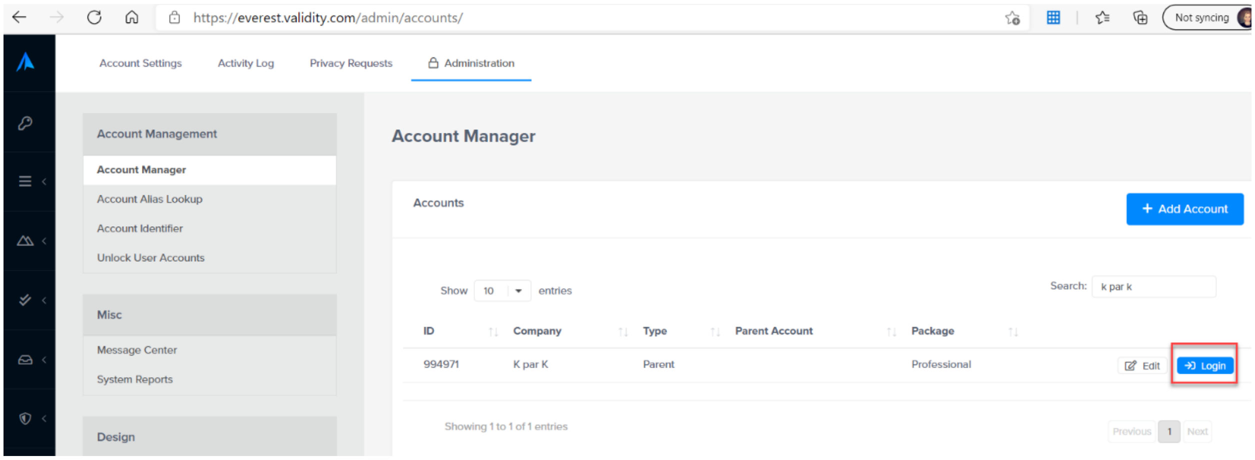
And change the primary account owner's email address to the one you just added



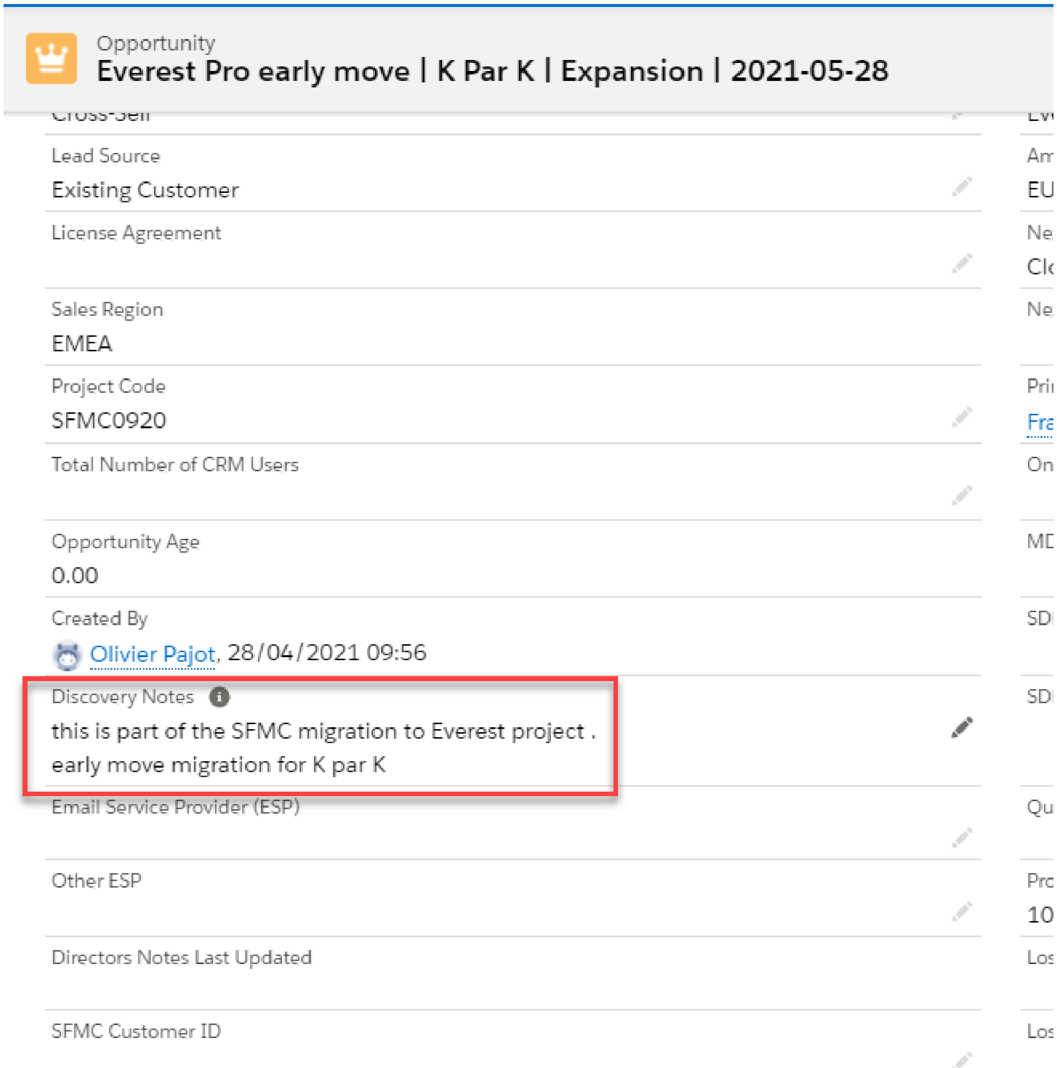
Click save

V) Everest settings

Login to the account

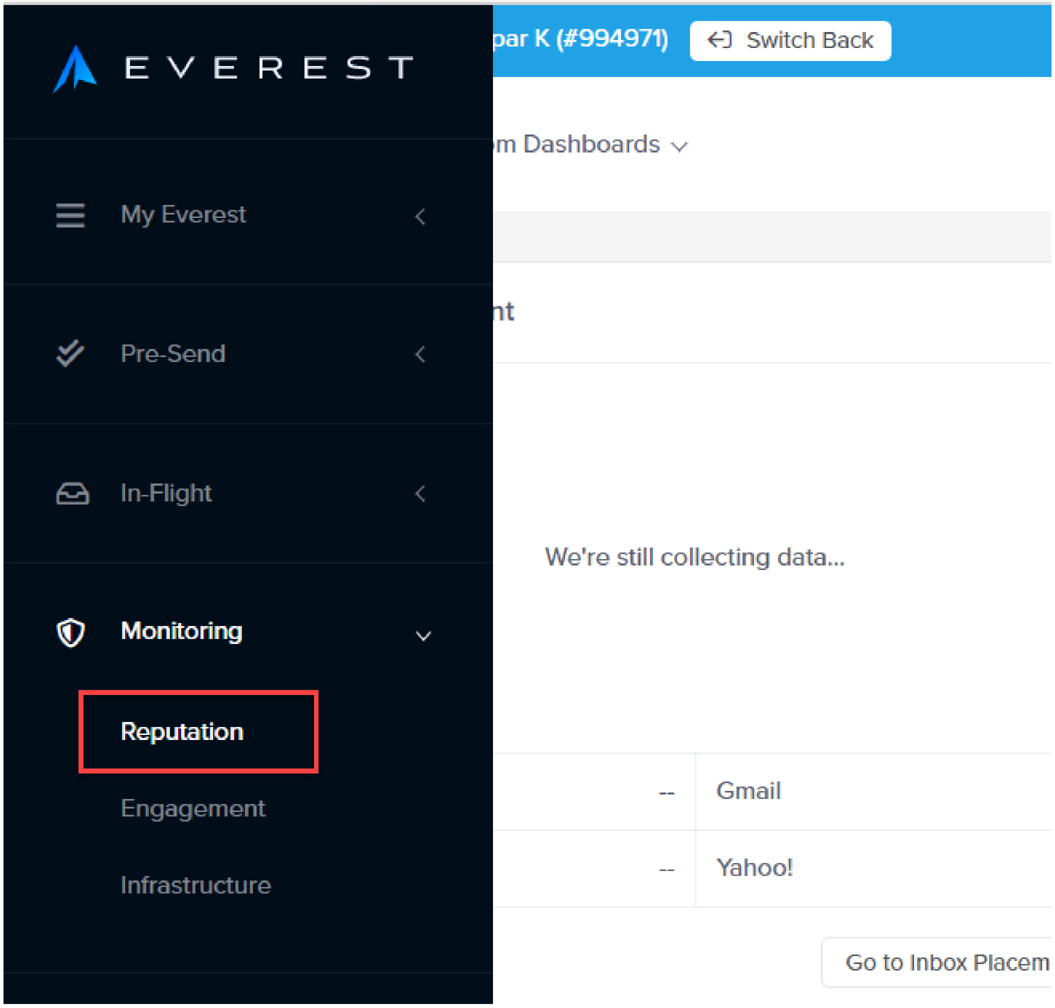


Check the Salesforce opportunity for any Discovery Notes (that would tell you some information like IPs or Domains the client uses)

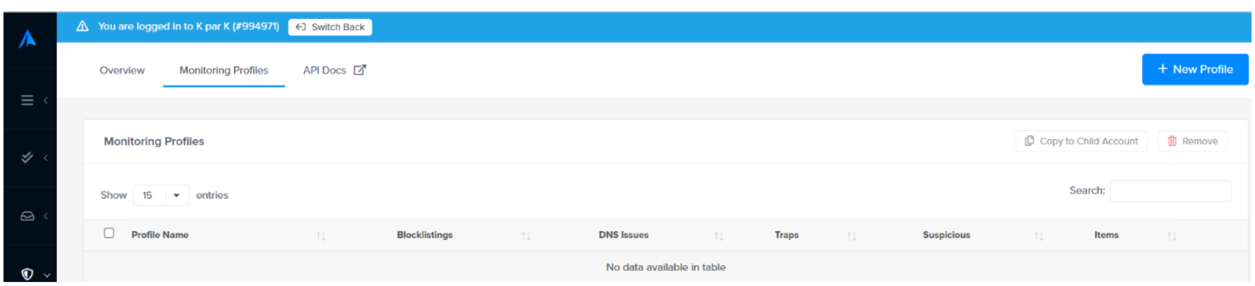


If there is a list of IPs/Domains

Go to Monitoring>Reputation



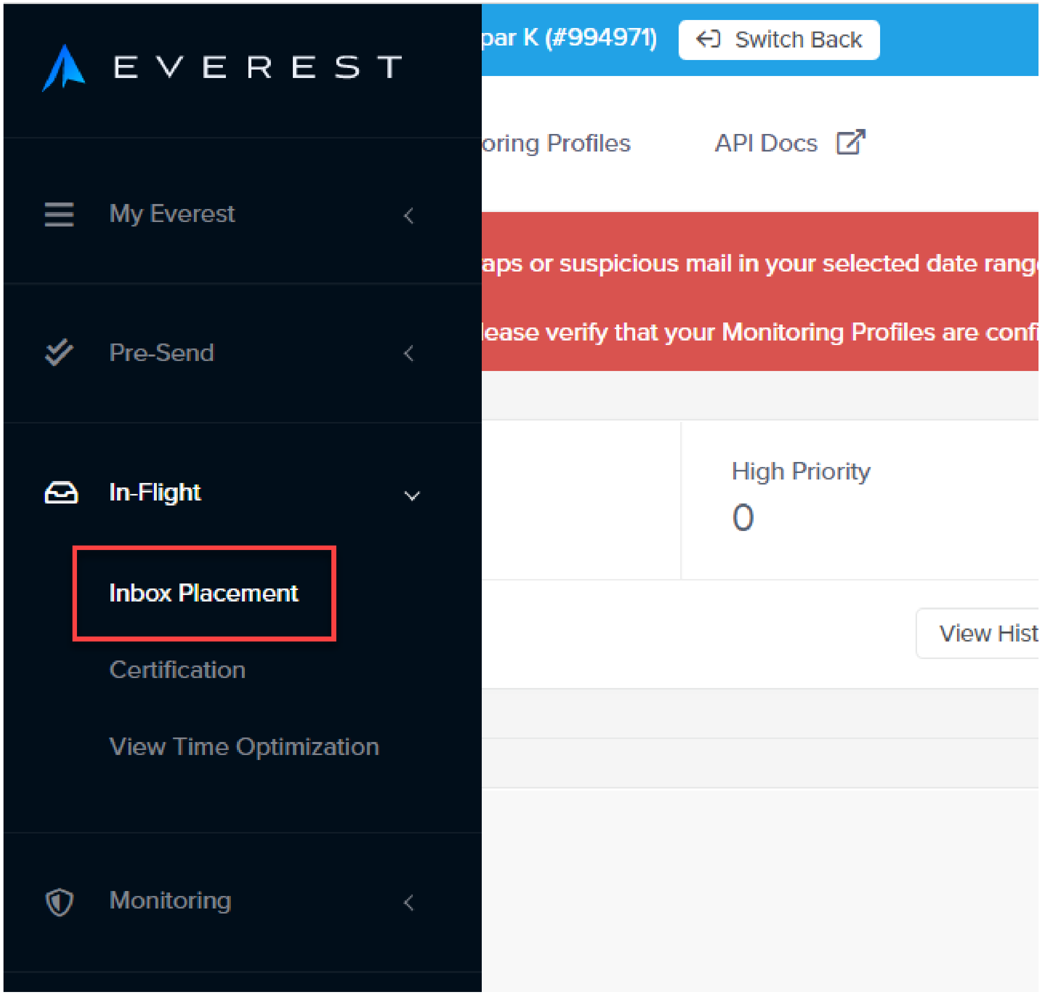
And create a monitoring profile



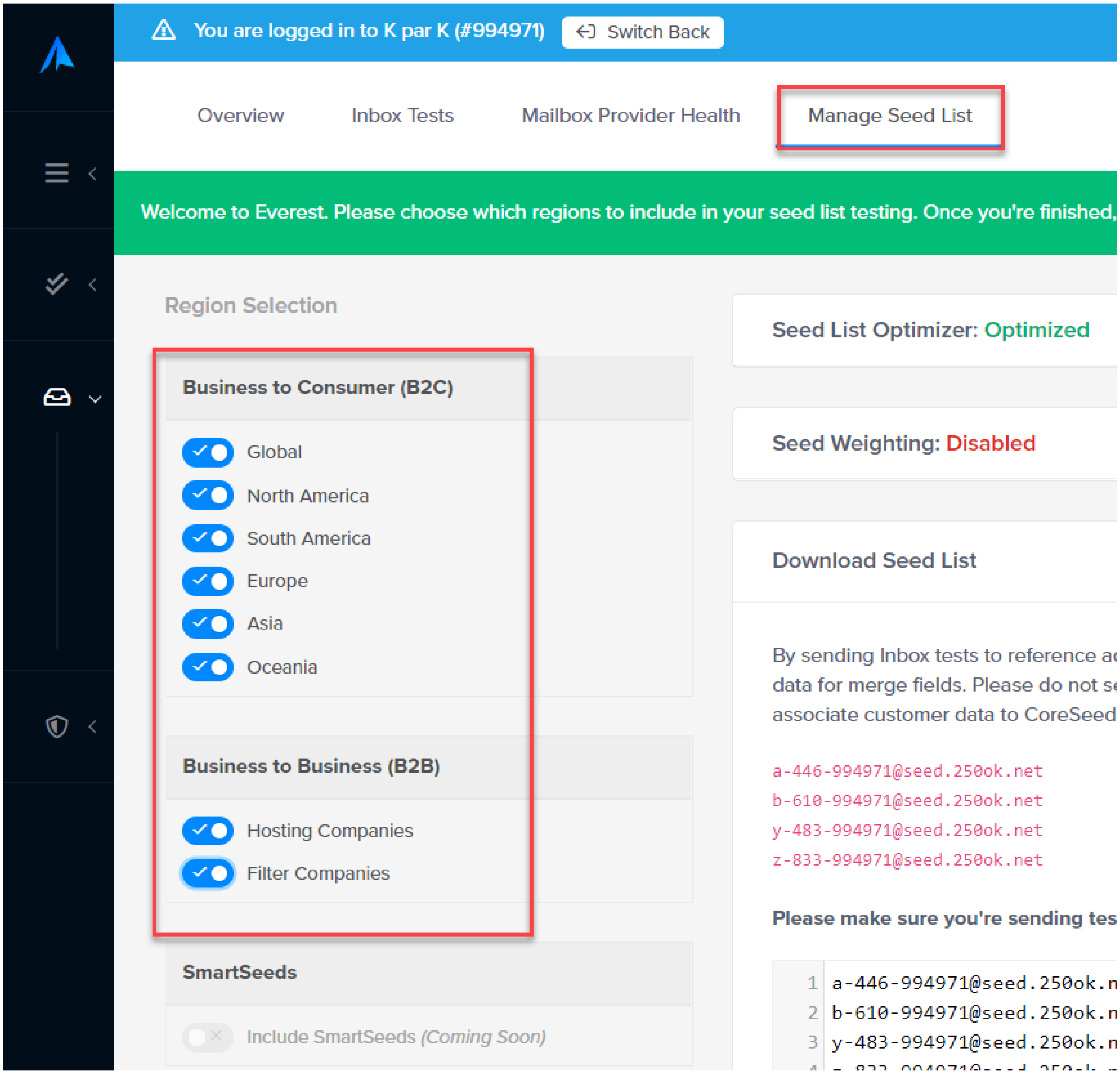
Click on + New Profile and follow the steps

If they are a Migrating client, go into the Profile available by clicking on the arrow on the right, and remove the “/31” or “/32” form each IP and Save

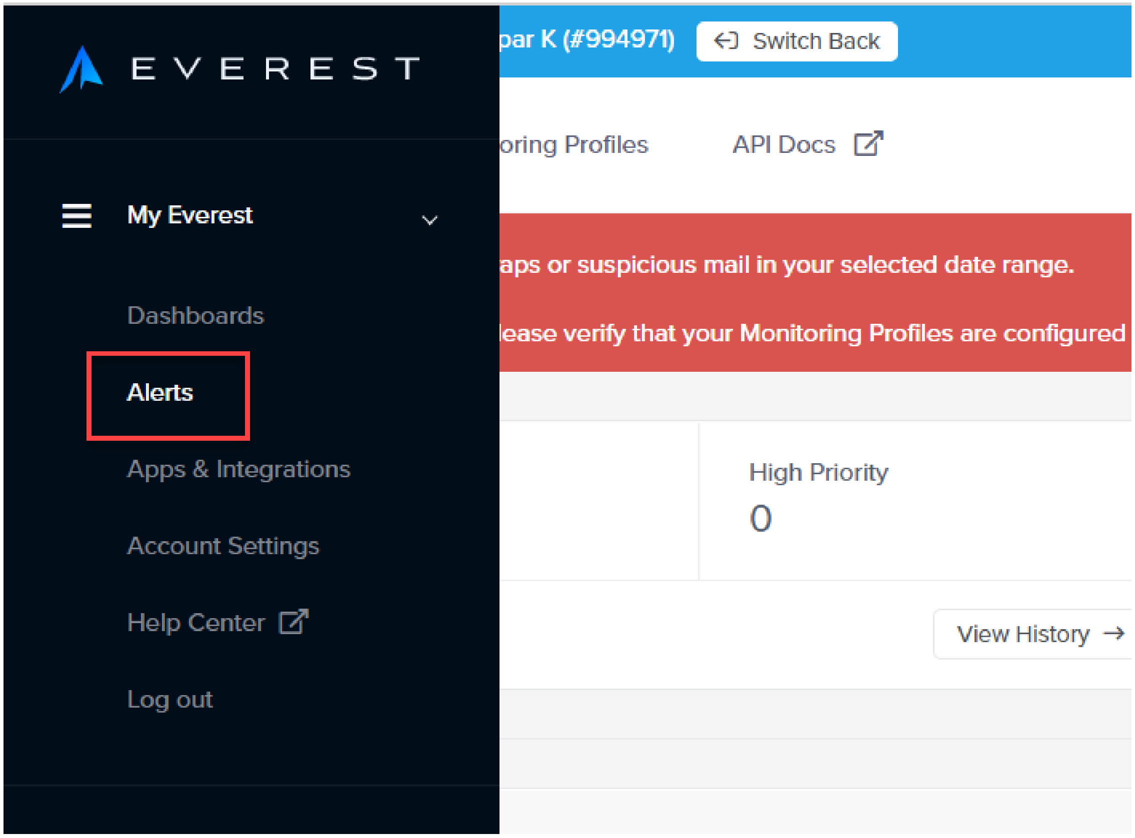
Next go to In-Flight>Inbox Placement



In manage Seed List, make sure all of the regions are toggled on Blue

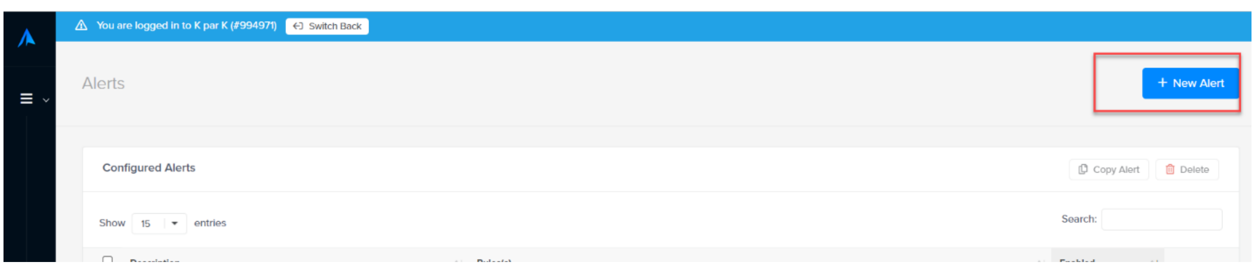


Next go to My Everest > Alerts

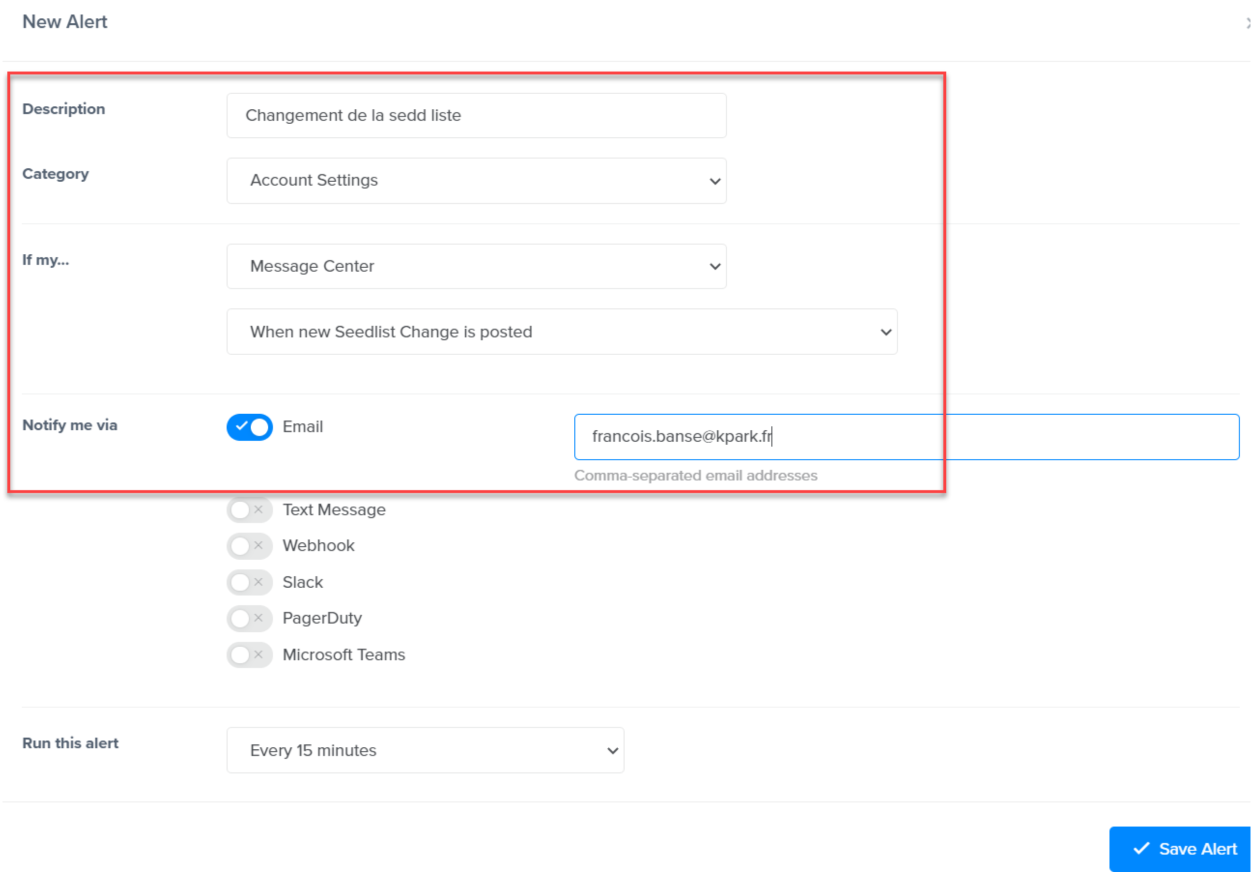


You need to create an Alert for the customer so they are notified when the Seed List changes.

Click on + New Alert



Fill out the form as follows, name the alert “Changes to the Seed List”

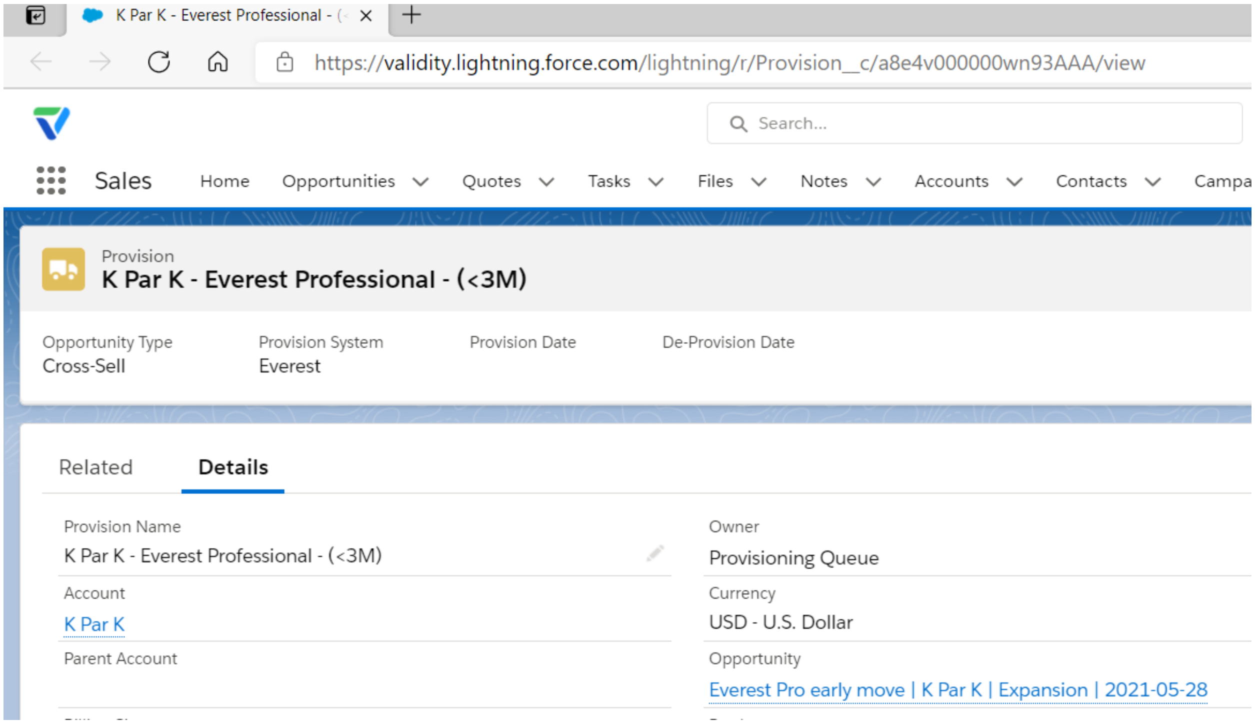


And make sure you add your customers email address (the primary owner)

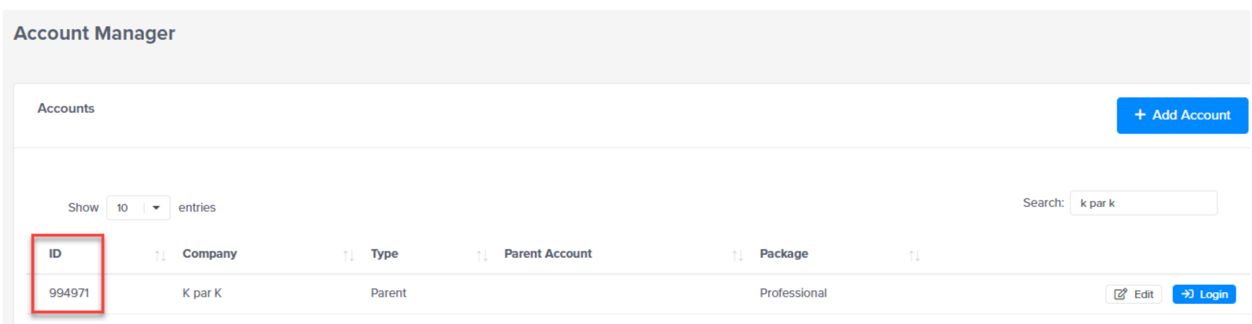
And Save Alert

VI) Updating Salesforce

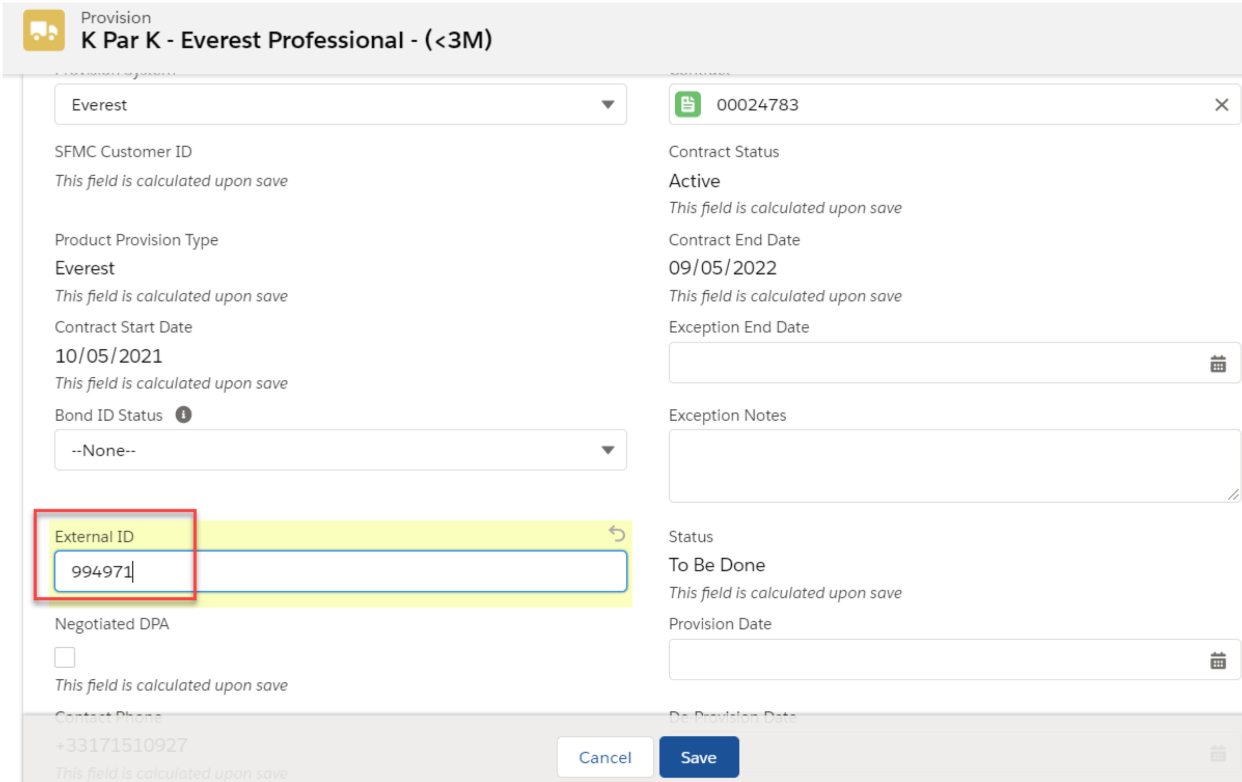
Got to the provision tab of your Salesforce account. (if you closed it, it's Salesforce>search name of account> Related> scroll all the way to the bottom and find the provison for Everest)



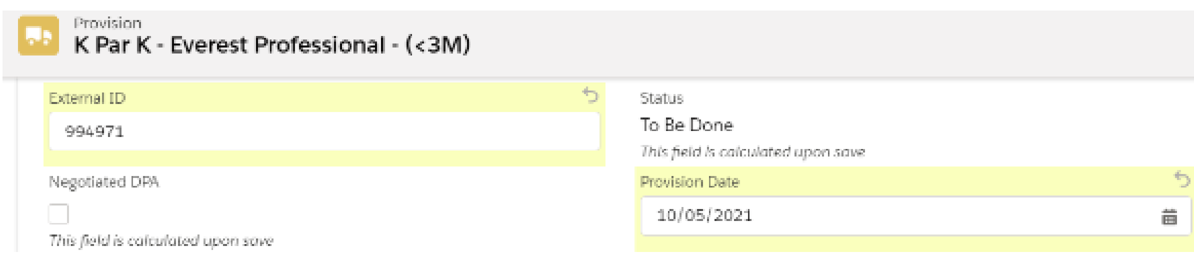
You need the Everest account ID

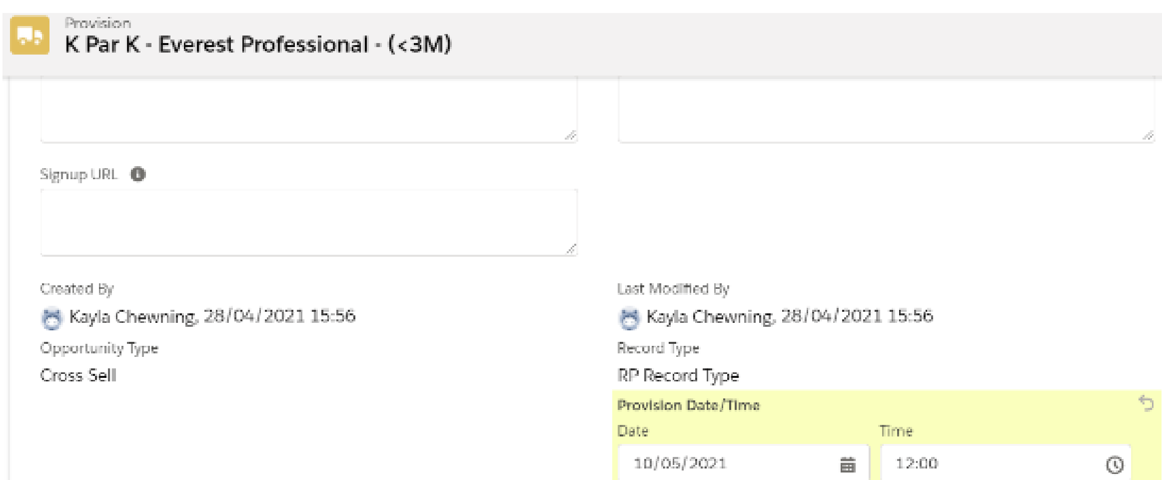


And you need to add it in the External ID field on the provision object in Salesforce

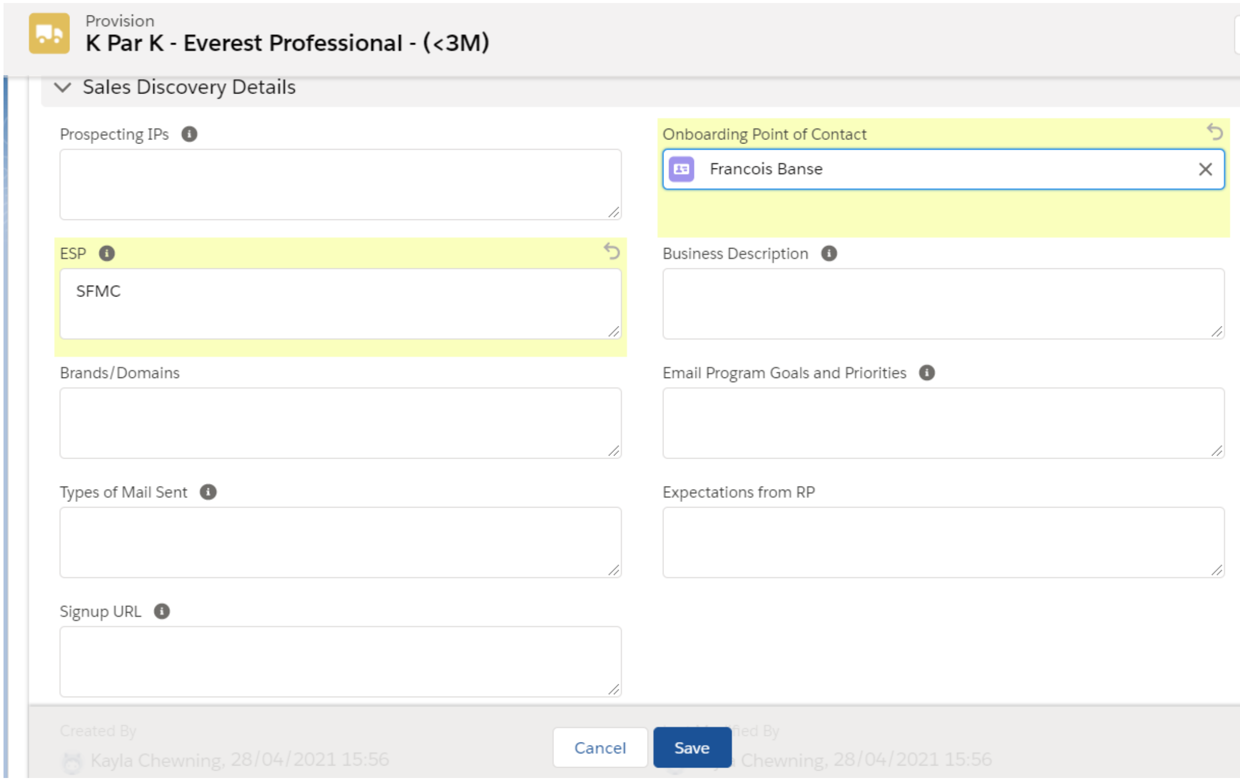


You also need to add the provision date (contract start date) twice!





And any other details you might have, such as IPs, Domains, ESP, Onboarding contact…

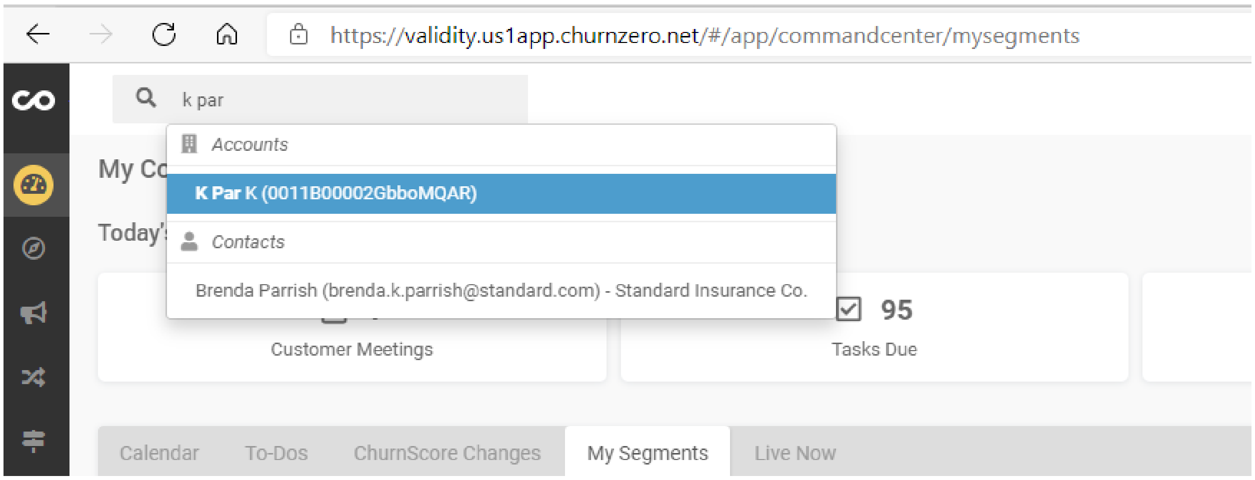


And Click Save

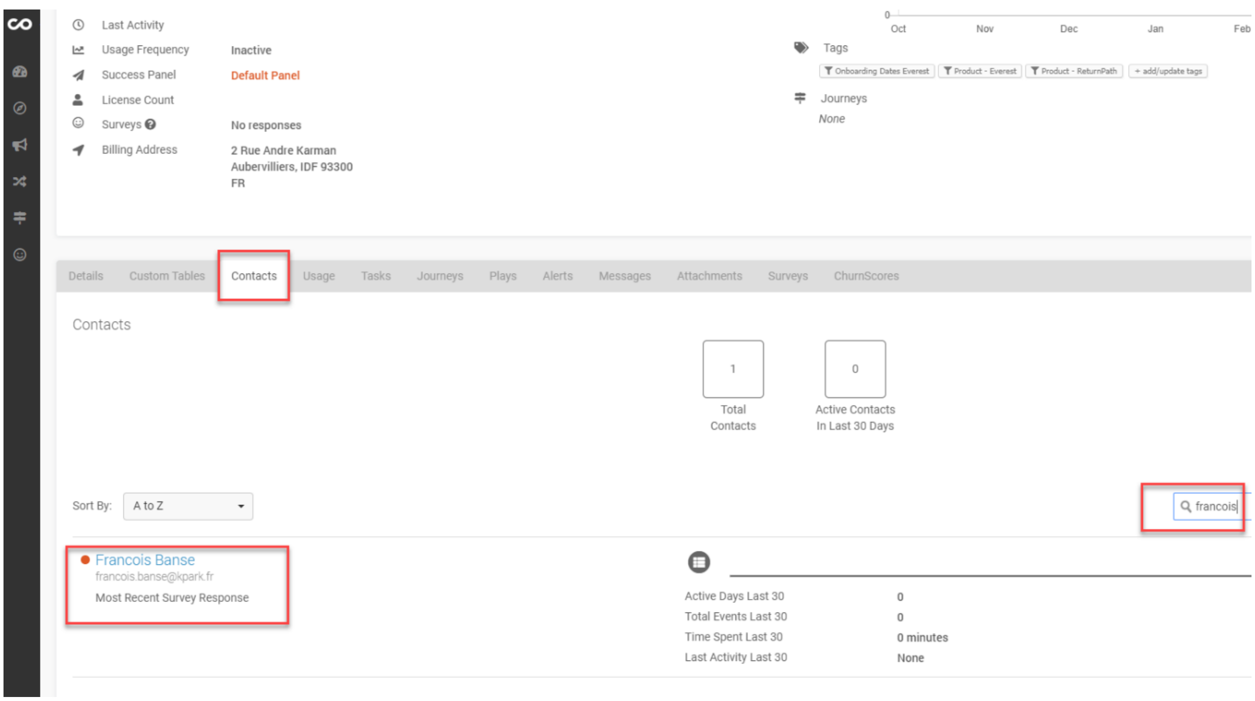
VII) ChurnZero Journey

Login to ChurnZero [ChurnZero]

Search for the client's name

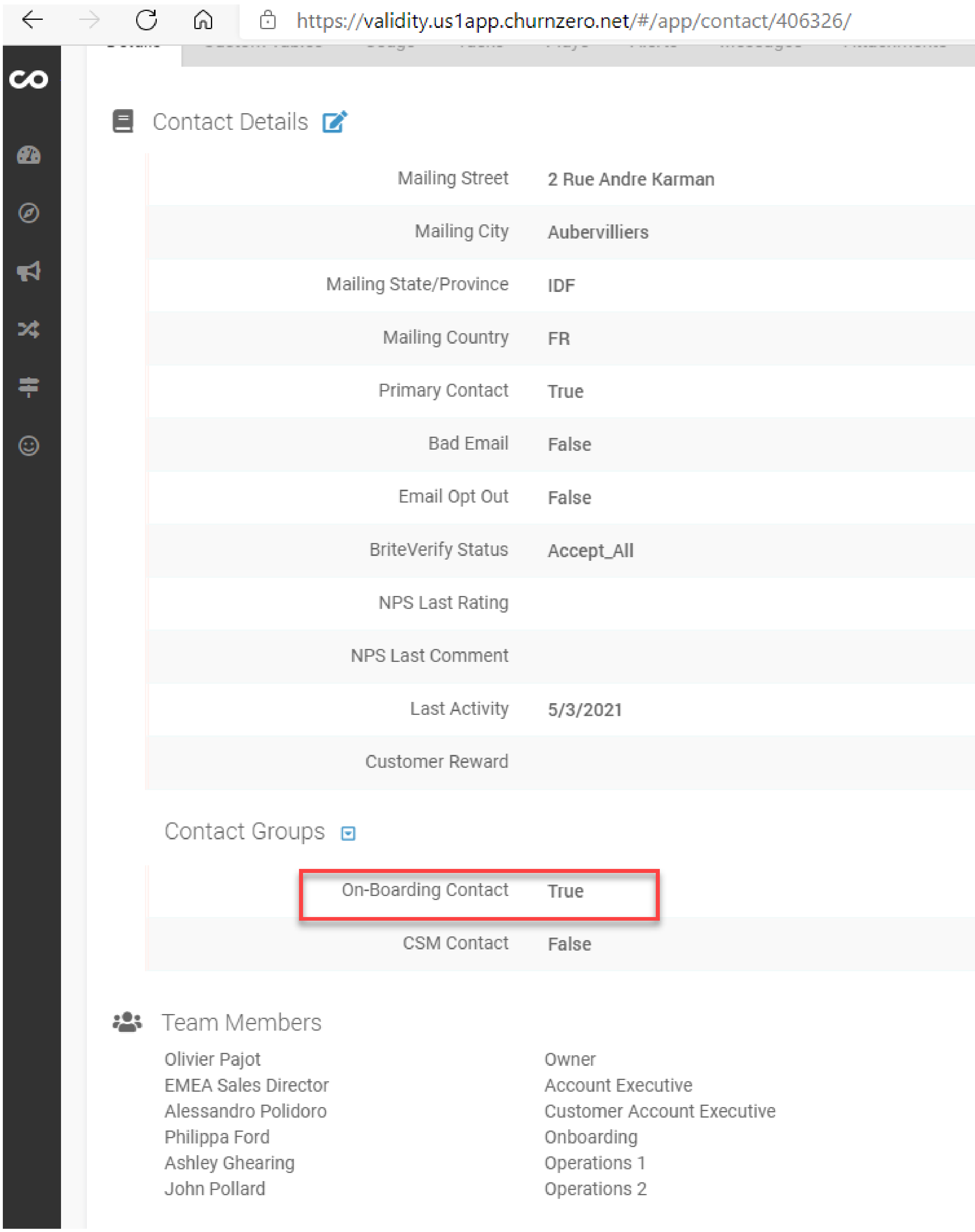


To make sure your onboarding contact is set to "true", go to the contacts tab, search for your contact



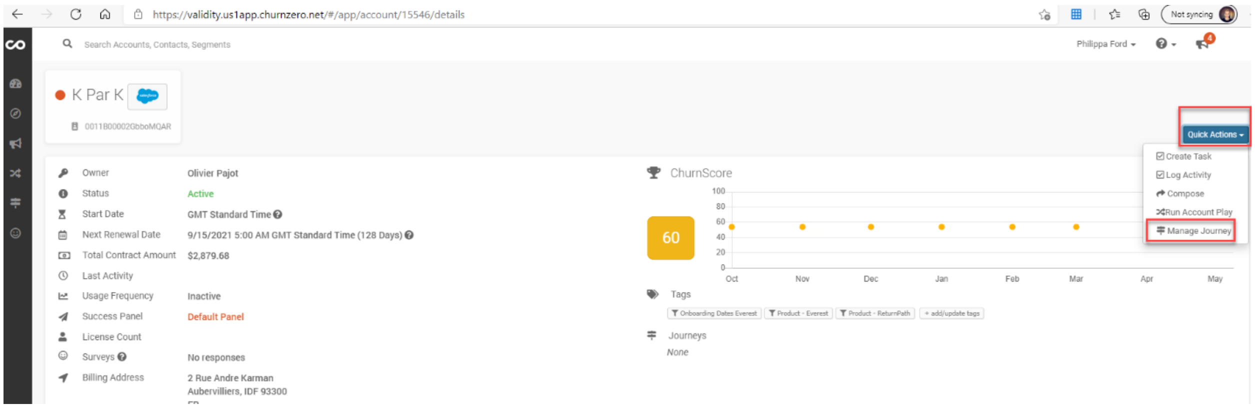
Click on the name in blue

Scroll down and check the section "On-boarding contact True"

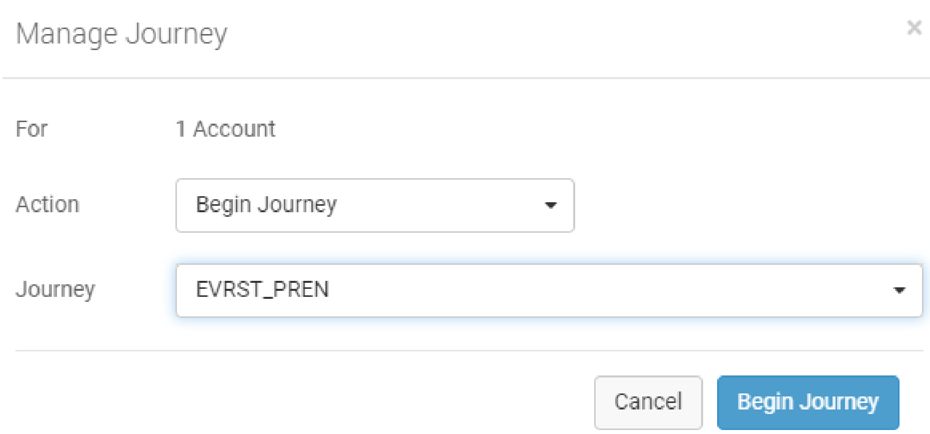


If flase change to true by using the pencil.

Go back to the account, and start the journey by clicking on “Quick Actions” and “Manage Journeys”

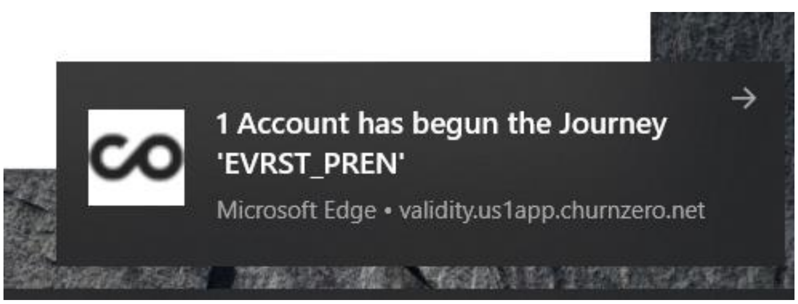


Select the appropriate journey to Begin, as my client is Everest Professional but paying under $40k (as per contract annual value), the correct journey is EVRST_PREN

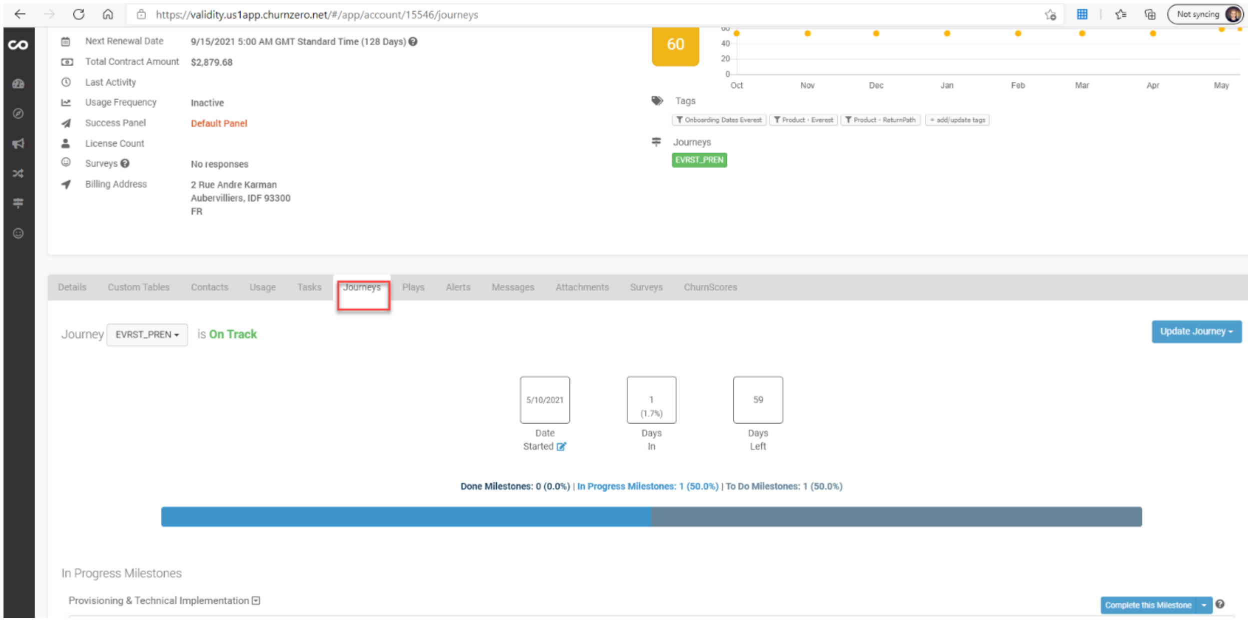


Click Begin Journey

Wait for ChurnZero to do a beep noise and the notification to pop up



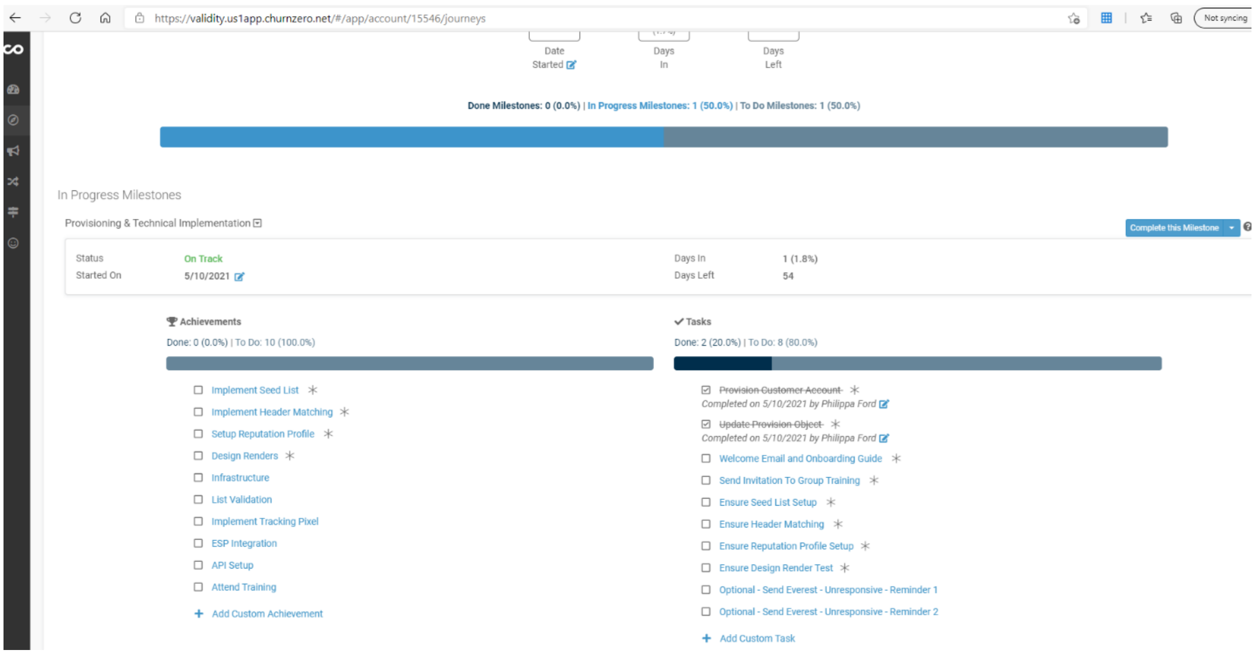
Go onto the Journey tab of your account



https://validity.us1app.churnzero.net/#/app/account/15546/journeys
Not syncing
Next Renewal Date
9/15/2021 5:00 AM GMT Standard Time (128 Days)
Total Contract Amount
$2,879.68
Last Activity
Usage Frequency
Inactive
Success Panel
Default Panel
License Count
Surveys
No responses
Billing Address
2 Rue Andre Karman
Aubervilliers, IDF 93300
FR
60
Oct Nov Dec Jan Feb Mar Apr May
Tags
Journeys
EVRST_PREN
Details Custom Tables Contacts Usage Tasks Journeys Plays Alerts Messages Attachments Surveys ChurnScores
Journey EVRST_PREN is On Track
Update Journey
5/10/2021
Date Started
1 (1.7%)
Days In
59
Days Left
Done Milestones: 0 (0.0%) | In Progress Milestones: 1 (50.0%) | To Do Milestones: 1 (50.0%)
In Progress Milestones
Provisioning & Technical Implementation
Complete this Milestone

VIII) ChurnZero Milestone

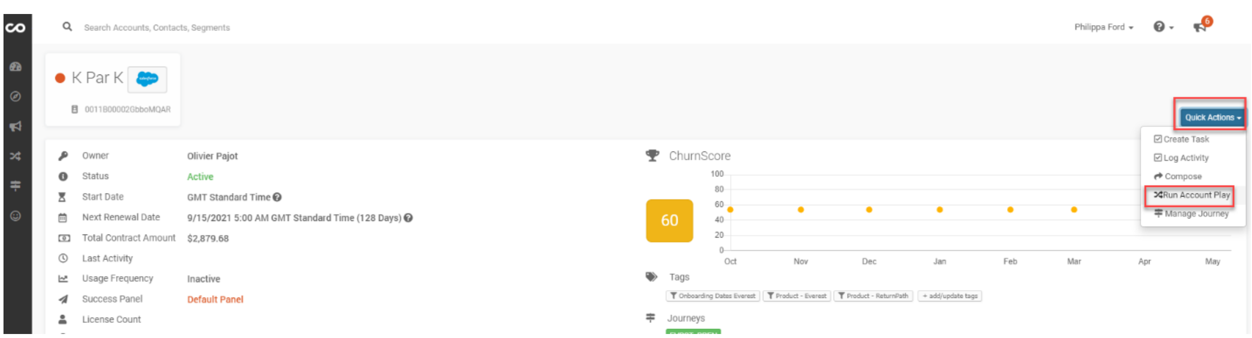
The first Milestone will appear, with a list of tasks you can complete (the ones with a * are required), your side is the right hand side and the left hand side are the tasks your client must do. This is for you to keep a track of.



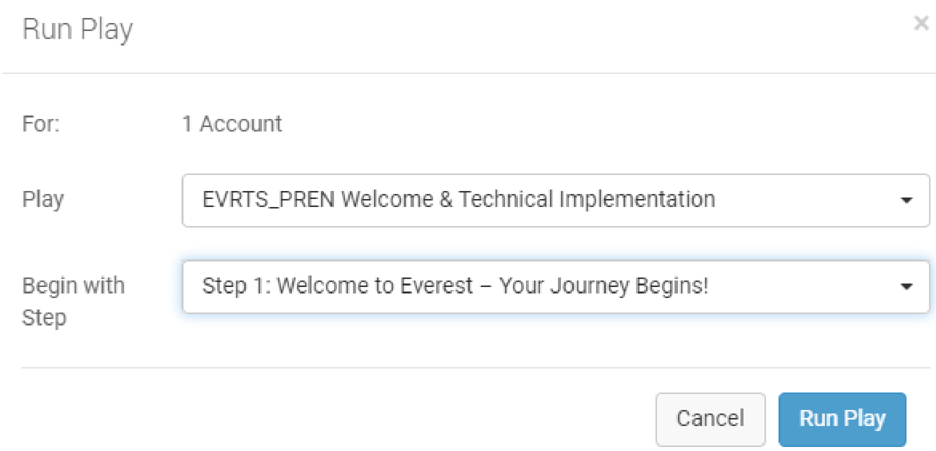
As we have provisioned the account in Everest, we can tick it off. We can also tick off the Update provision object task which is what we did in Salesforce.

If you setup the client's monitoring profile for reputation you can also tick that off from both side.

Now you need to send the client a welcome email, which is what we call a ChurnZero Play. To send the Welcome Play, click on Quick Actions, and Run Account Play

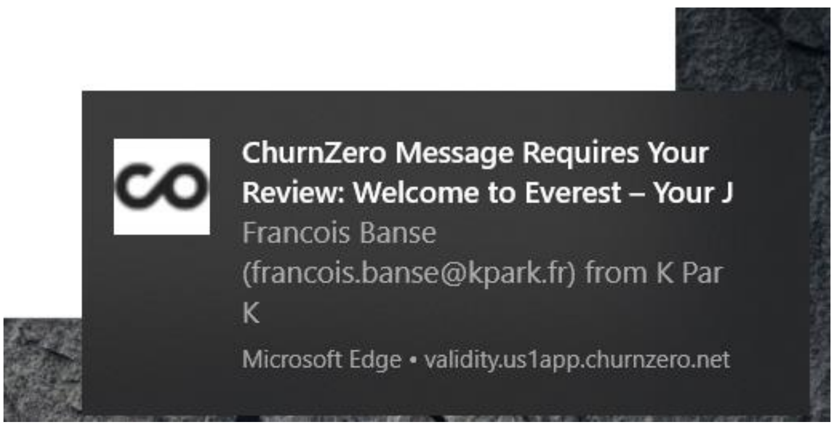


Choose the Welcome play that you need, as I am in the EVRST_PREN Journey, I will need to welcome play for Everest Professional customers paying under $40K

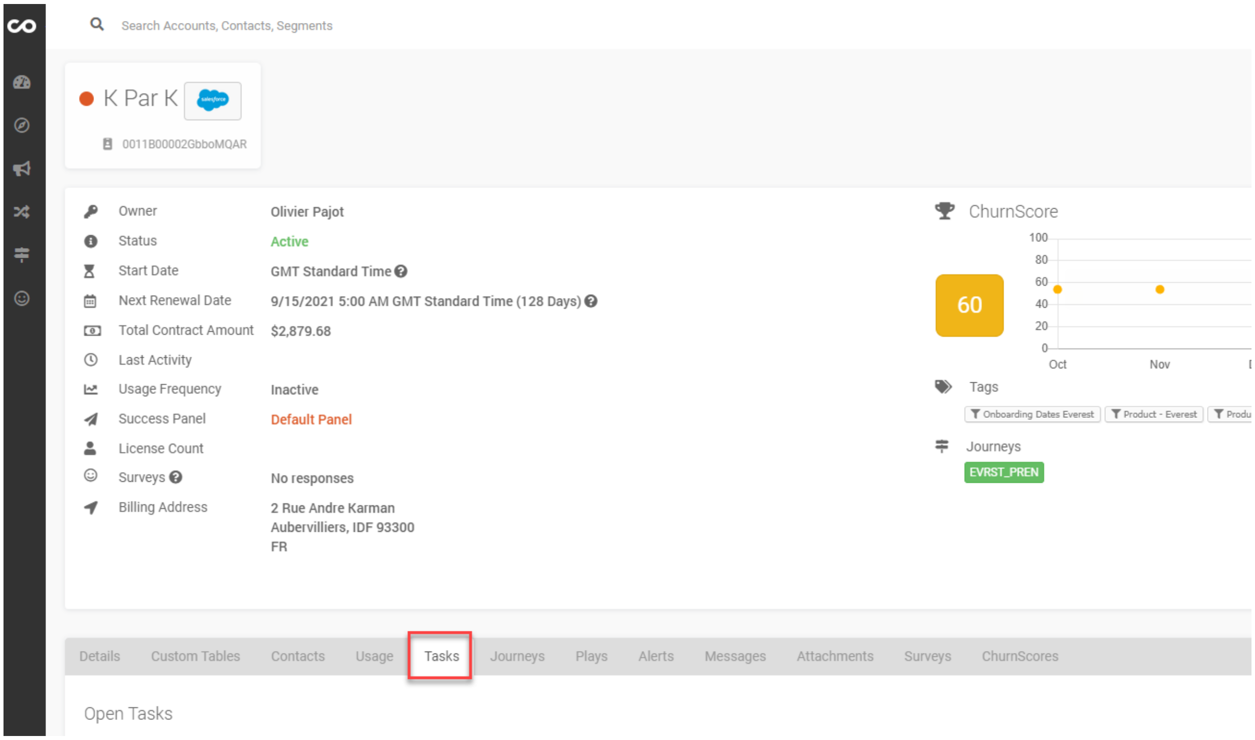


Click on Run Play

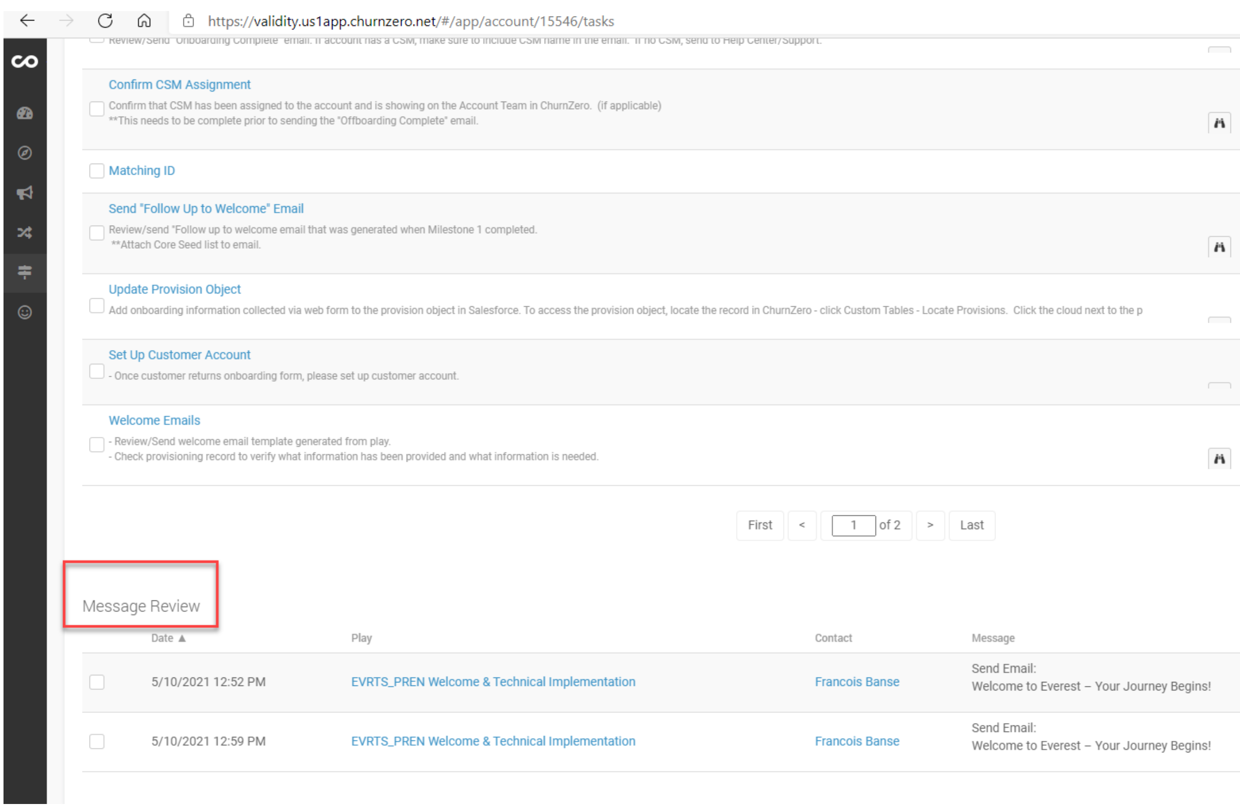
ChurnZero will take usually up to 15mins to launch the play, you should get a notification and a beep noise



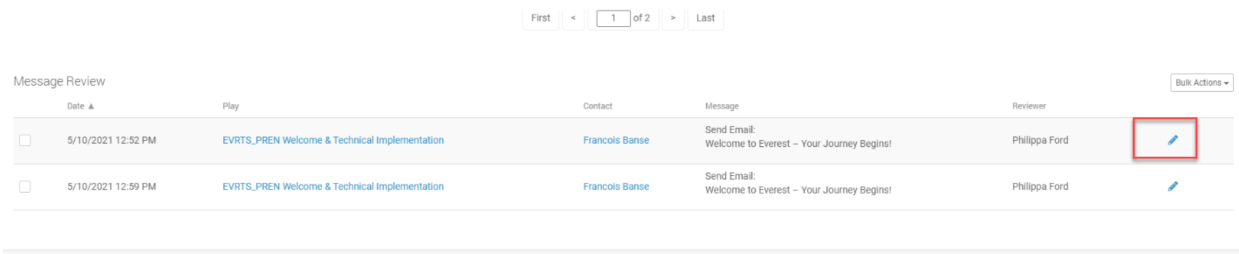
Go to your account and the Task tab



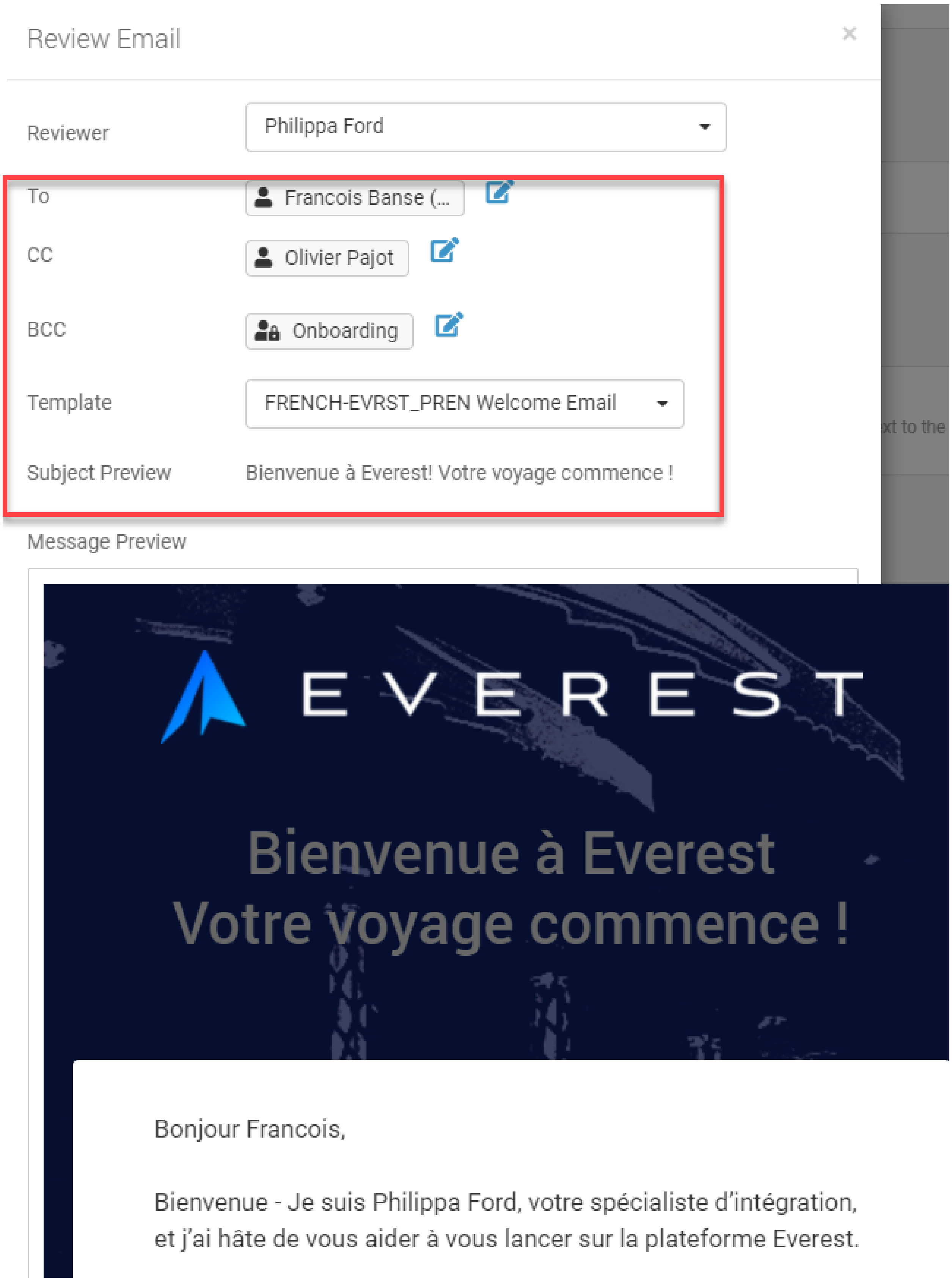
And scroll down to the message review section



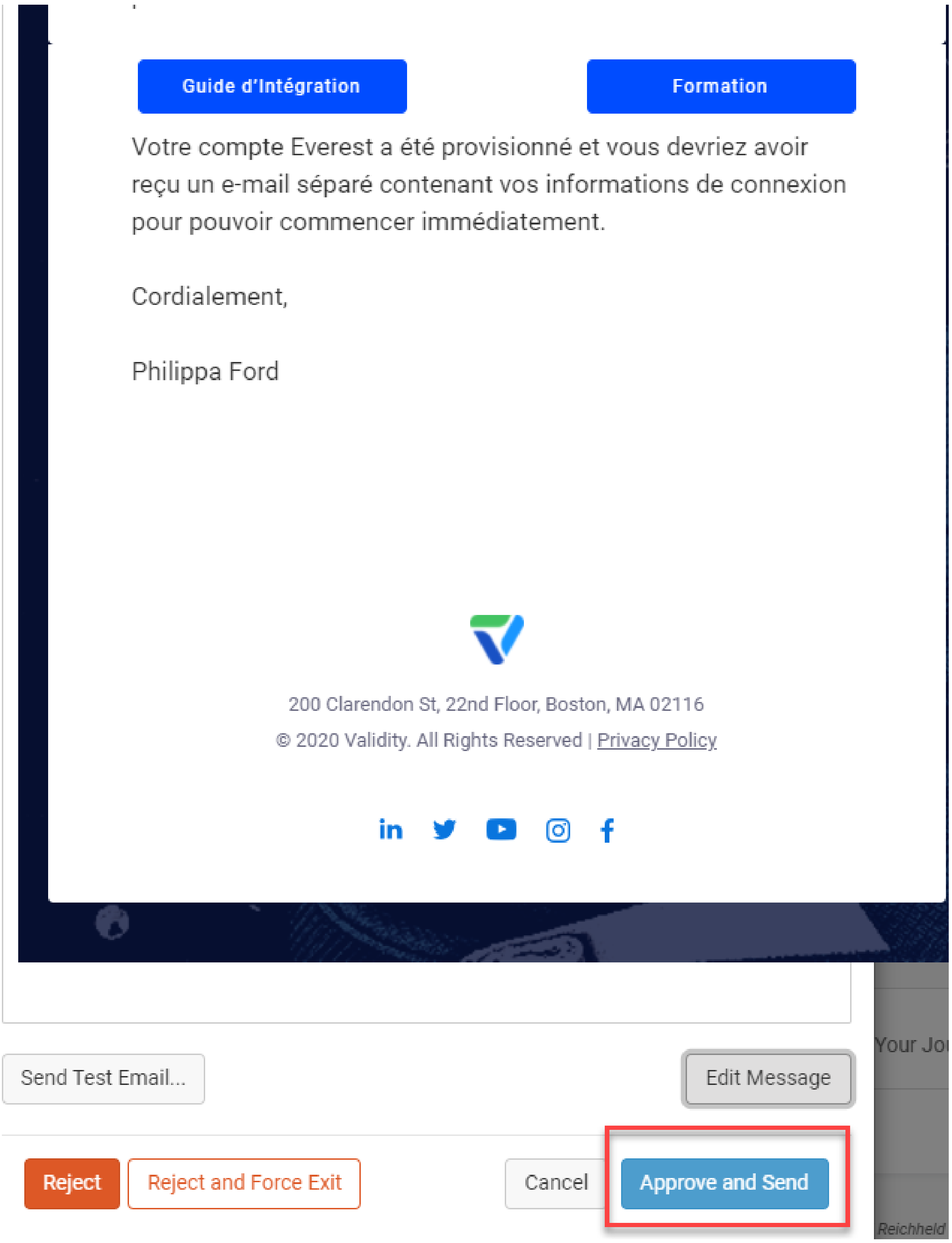
Click on the pencil for the welcome play



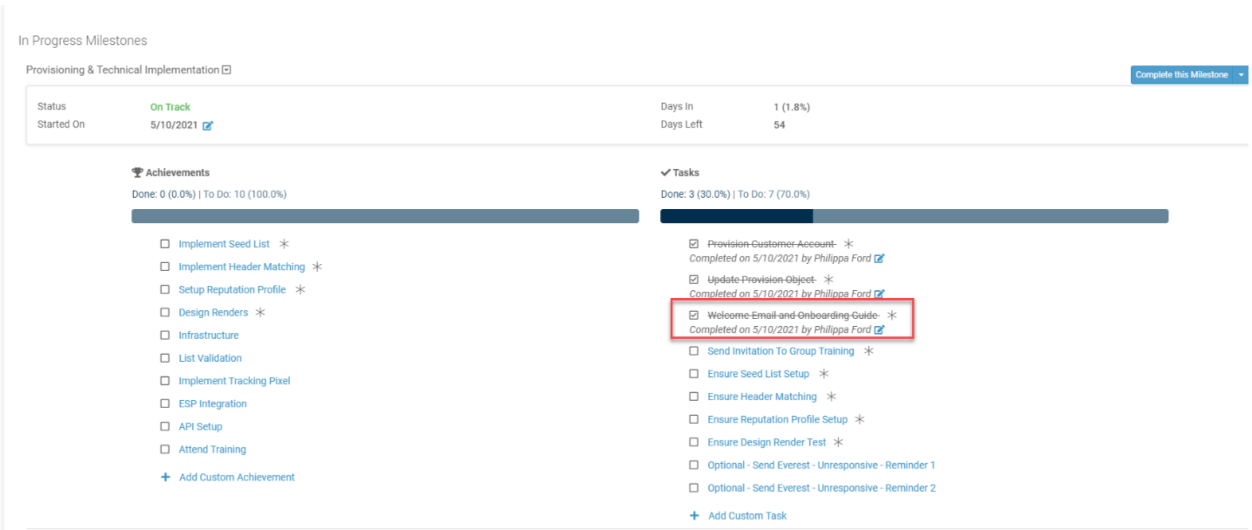
You will need to add the AE in CC of the email, preview the email to check it is the correct one (correct language and play)


Review Email
×
Reviewer
Philippa Ford
To
Francois Banse (...
CC
Olivier Pajot
BCC
Onboarding
Template
FRENCH-EVRST_PREN Welcome Email
Subject Preview
Bienvenue à Everest! Votre voyage commence !
Message Preview
EVEREST
Bienvenue à Everest
Votre voyage commence !
Bonjour Francois,
Bienvenue - Je suis Philippa Ford, votre spécialiste d'intégration, et j'ai hâte de vous aider à vous lancer sur la plateforme Everest.

Once you are happy click on Approve & Send



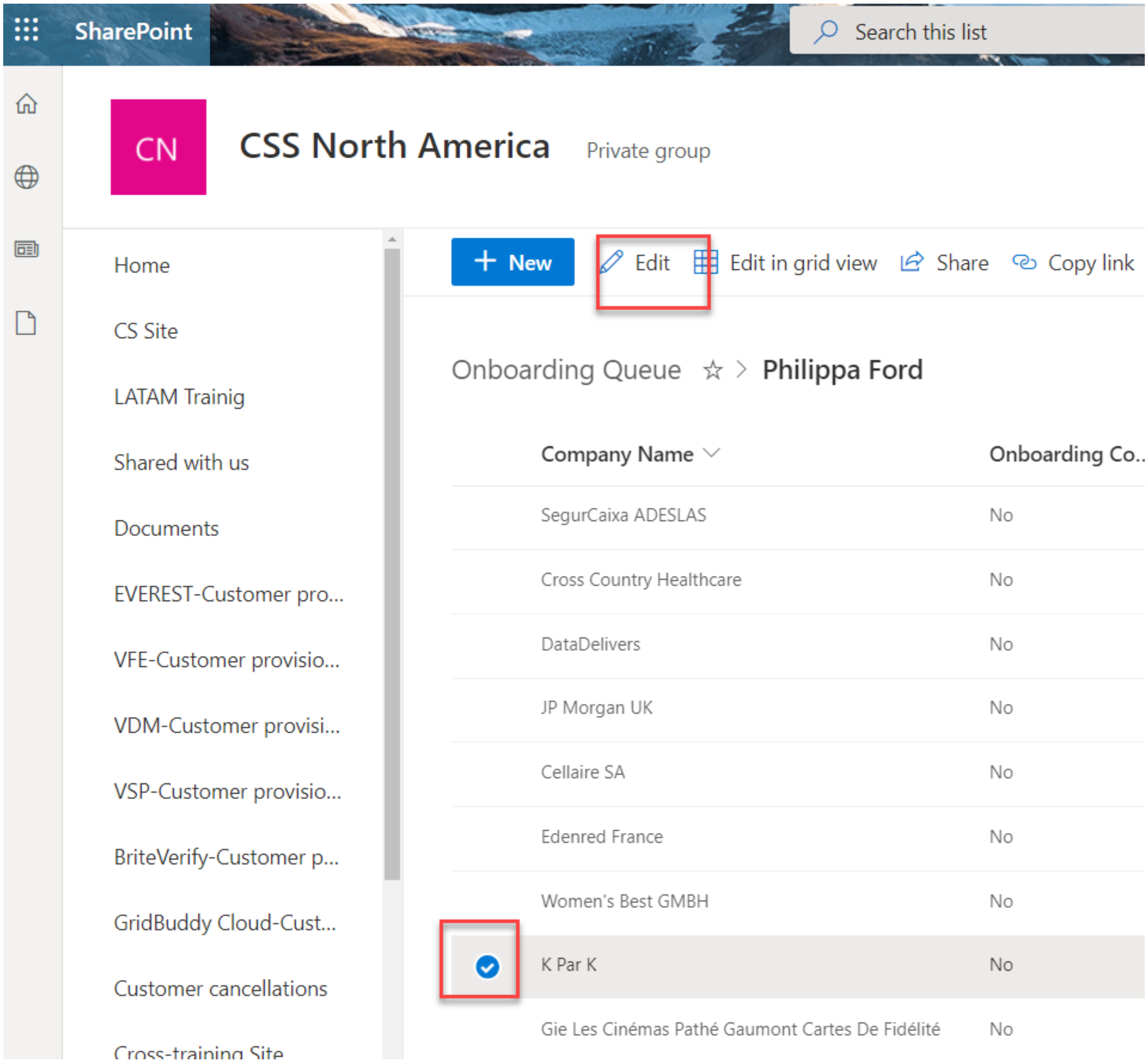
Now go back to the journey tab and tick off the welcome email and onboarding guide task


In Progress Milestones
Provisioning & Technical Implementation
Complete this Milestone
Status
On Track
Started On
5/10/2021
Days In
1 (1.8%)
Days Left
54
Achievements
Done: 0 (0.0%) | To Do: 10 (100.0%)
Implement Seed List
Implement Header Matching
Setup Reputation Profile
Design Renders
Infrastructure
List Validation
Implement Tracking Pixel
ESP Integration
API Setup
Attend Training
Add Custom Achievement
Tasks
Done: 3 (30.0%) | To Do: 7 (70.0%)
~~Provision Customer Account~~
Completed on 5/10/2021 by Philippa Ford
~~Update Provision Object~~
Completed on 5/10/2021 by Philippa Ford
~~Welcome Email and Onboarding Guide~~
Completed on 5/10/2021 by Philippa Ford
Send Invitation To Group Training
Ensure Seed List Setup
Ensure Header Matching
Ensure Reputation Profile Setup
Ensure Design Render Test
Optional - Send Everest - Unresponsive - Reminder 1
Optional - Send Everest - Unresponsive - Reminder 2
Add Custom Task

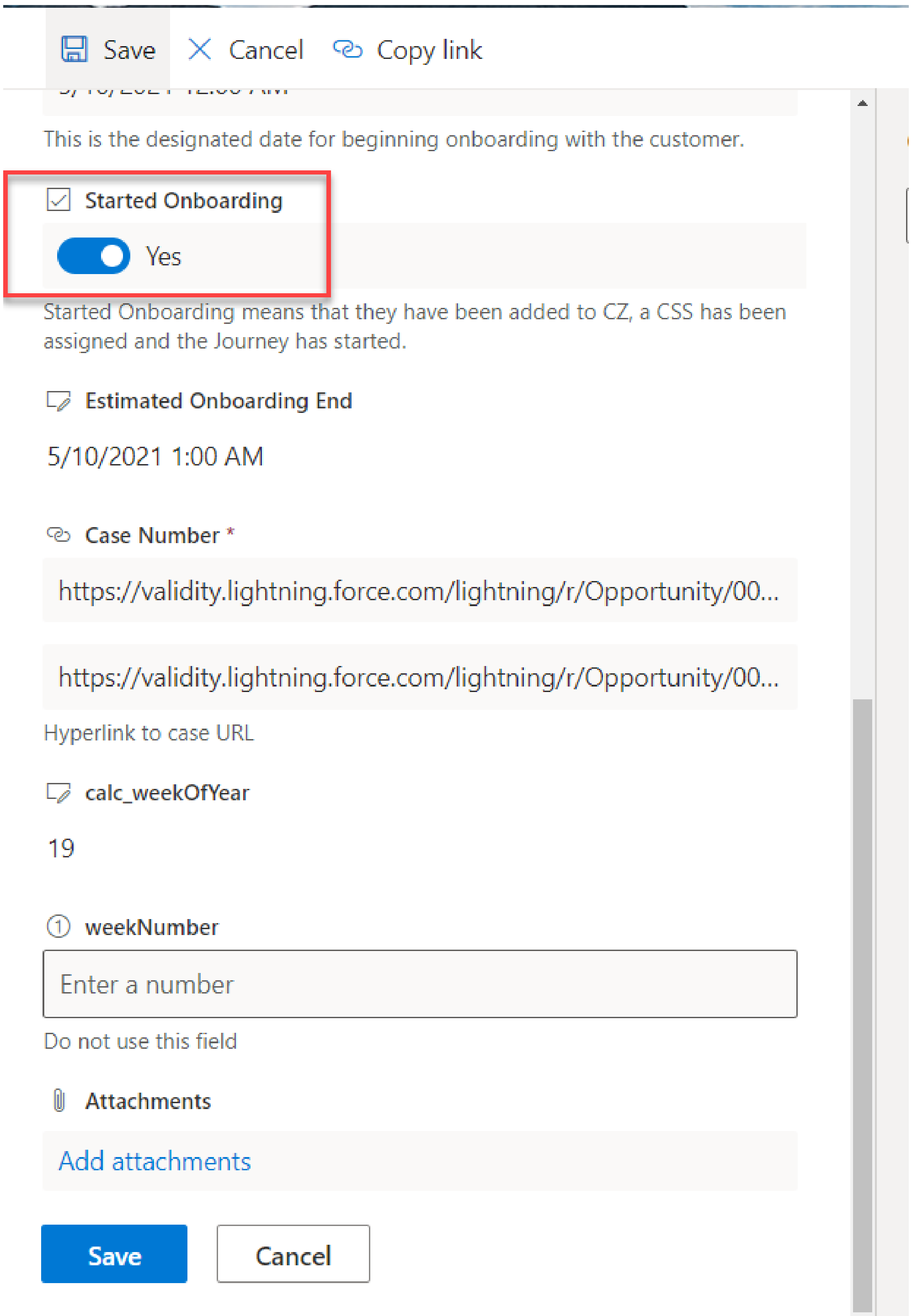
IX) Updating Onboarding Everest Queue in SharePoint.

Go to SharePoint [CSS North America - Onboarding Queue - All Items (sharepoint.com)]

Look for your client in the excel sheet, select it and click Edit



Scroll down and toggle on “started onboarding” this will send an email to the AE to let them know the client has started onboarding

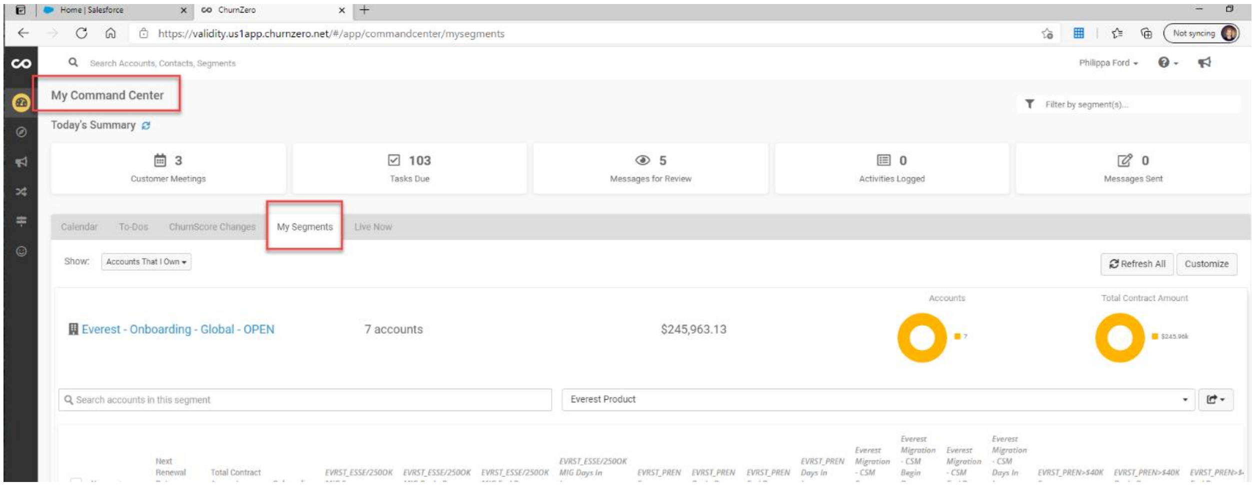


Click Save.

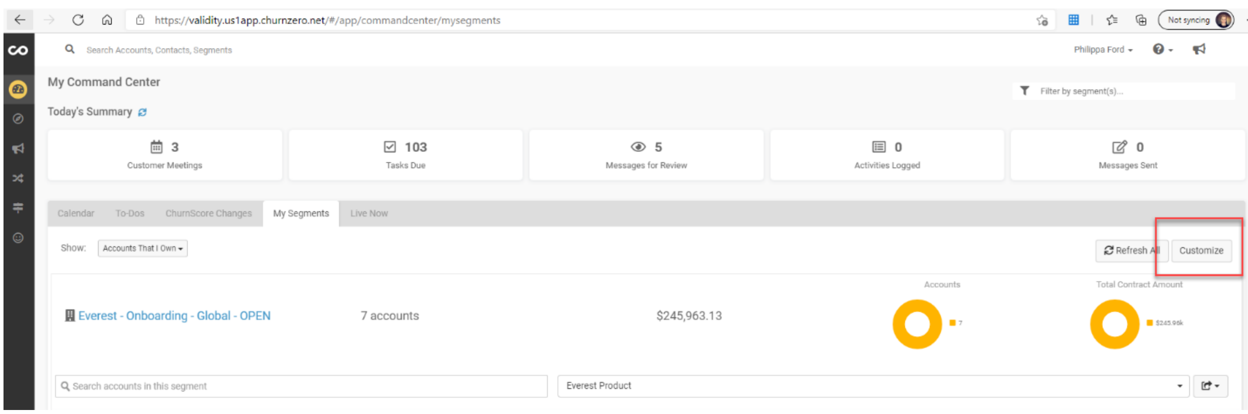
Now wait till tomorrow and check the client has logged into Everest.

X) Keeping on top of your clients

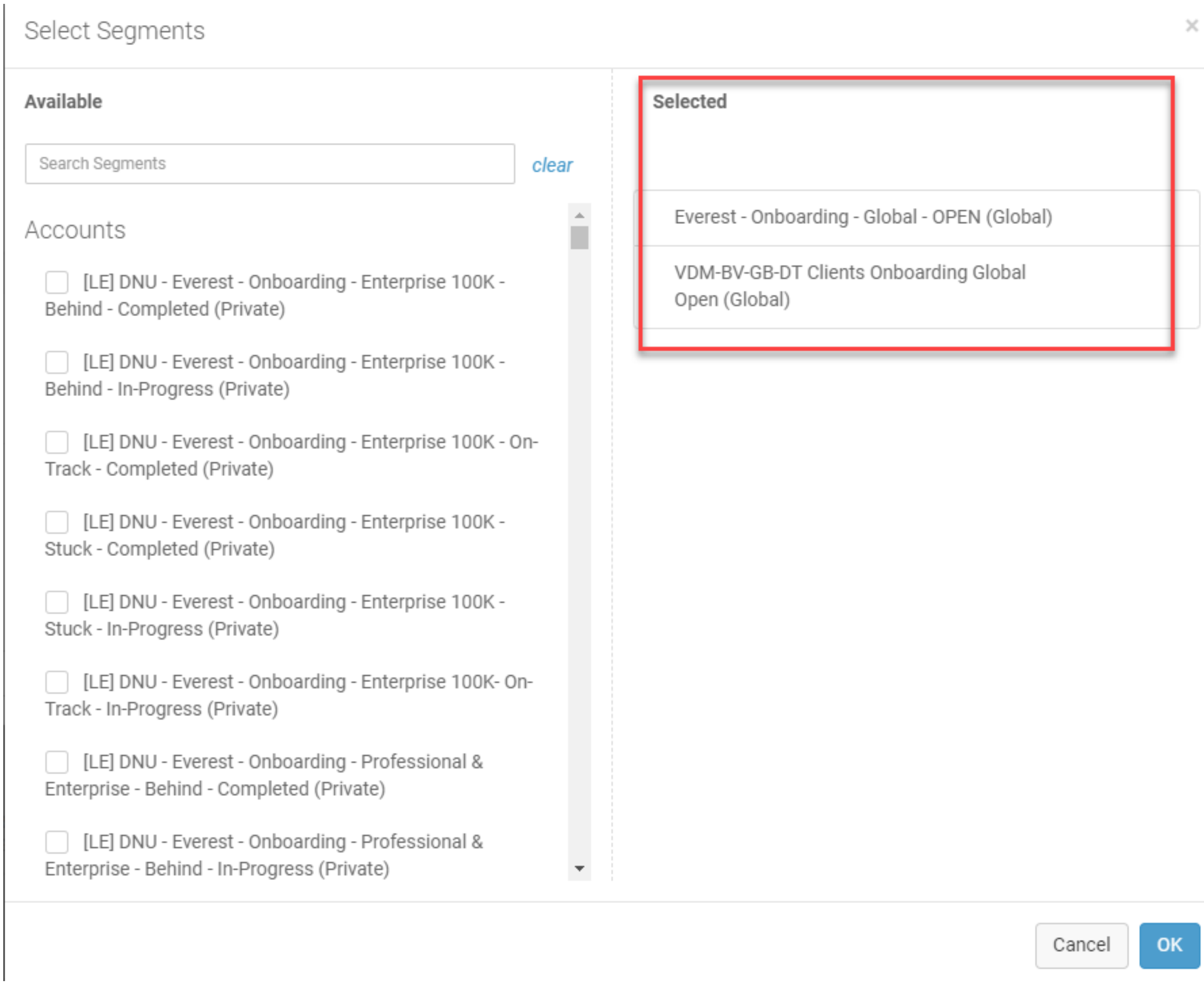
I suggest using ChurnZero to keep track of your clients progress. Login into ChurnZero, on your Command Center under the My Segments tab you can use my segments to keep an eye on your clients progress:



To add these segments click on Customize

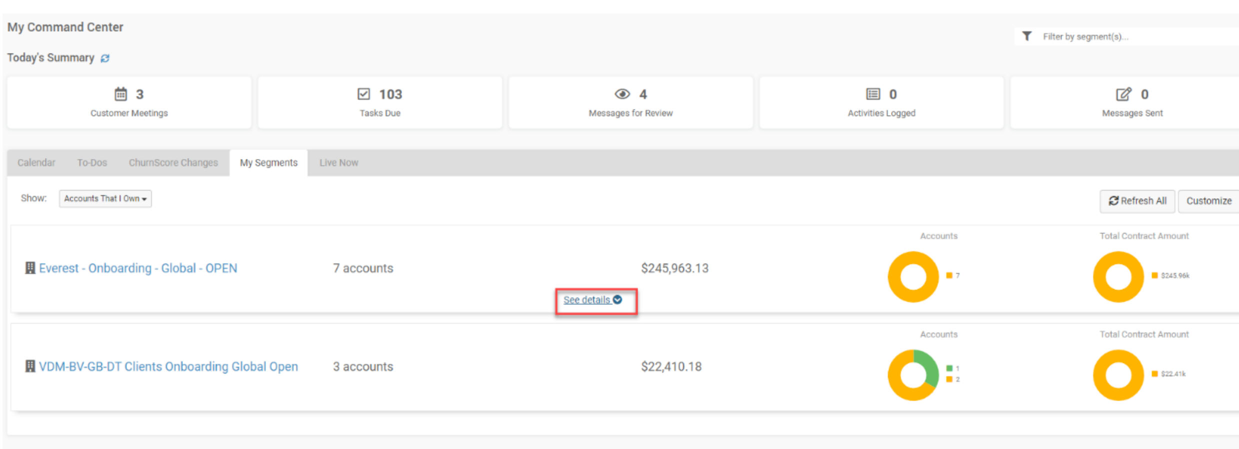


Search for these segments and tick them so they move over to the right hand side like this:



Then click OK.

You can expand them so you have the details of each client you have by clicking on see details:



Now I can see which clients are in which journey and how long it has been since they started the journey, remember to reach our targets they have 60 days in onboarding to complete the implementation stage

Everest - Onboarding - Global - OPEN

7 accounts

$245,963.13

7

$245.96k

Hide details

Search accounts in this segment

Everest Product

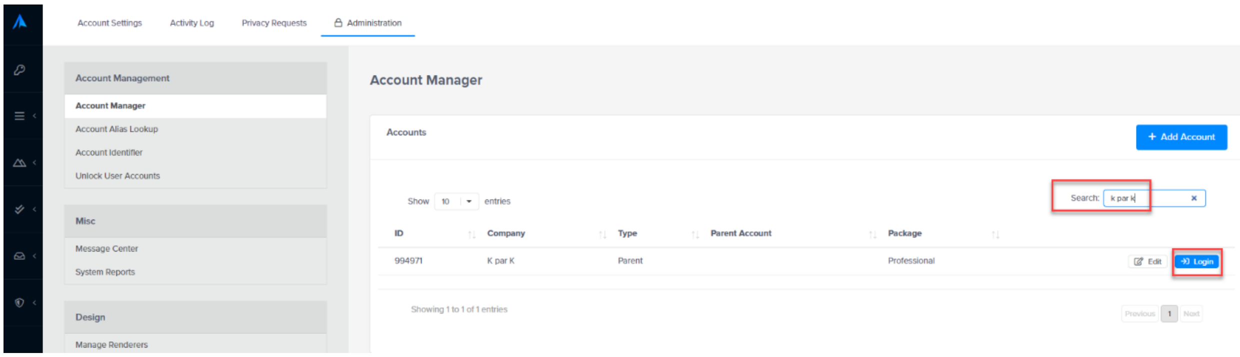
Name	Next Renewal Date	Total Contract Amount	Onboarding	EVRST_ESSE/250OK MIG Status	EVRST_ESSE/250OK MIG Begin Date	EVRST_ESSE/250OK MIG End Date	EVRST_ESSE/250OK MIG Days In Journey	EVRST_PREN Status	EVRST_PREN Begin Date	EVRST_PREN End Date	EVRST_PREN Days In Journey	Everest Migration - CSM Status	Everest Migration - CSM Begin Date	Everest Migration - CSM End Date	Everest Migration - CSM Days In Journey	EVRST_PREN>$40K Status	EVRST_PREN>$40K Begin Date	EVRST_PREN>$ End Date
Cellaire SA	4/30/2022	$4,892.54	Philippa Ford					In Progress - On Track	4/29/2021		13							
DataDelivers, LLC	4/11/2022	$13,000.00	Philippa Ford					In Progress - On Track	4/14/2021		28							
Edenred France, S.A.S	5/2/2022	$24,844.92	Philippa Ford					In Progress - On Track	5/4/2021		8							
JP Morgan UK	3/31/2022	$144,996.00	Philippa Ford													In Progress - On Track	4/20/2021	
K Par K	9/15/2021	$2,879.68	Philippa Ford					In Progress - On Track	5/10/2021		2							
SegurCaixa ADESLAS	3/28/2022	$12,000.00	Philippa Ford					In Progress - On Track	3/29/2021		44							
Women's Best GmbH	4/30/2022	$43,349.99	Philippa Ford													In Progress - On Track	5/4/2021	

For example I onboarded K par K yesterday, it now says 2 days since onboarding started, I want to now check if that client has managed to login to Everest.

XI) Clients Everest usage

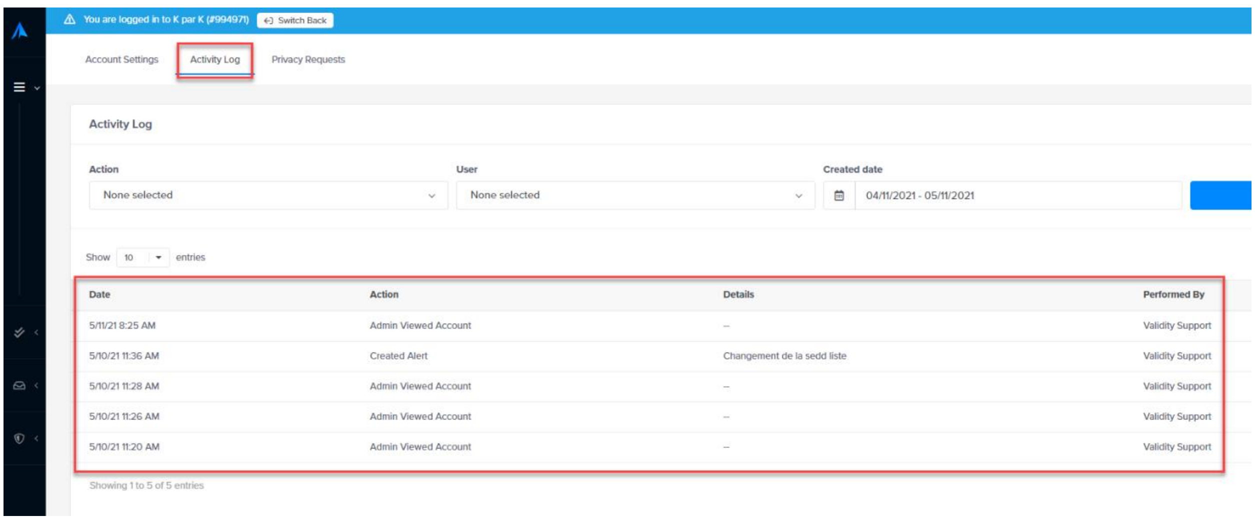
Login to Everest

Search for the client in My Everest > Administration > Account Manager > Search



Then Login as the owner into the clients account

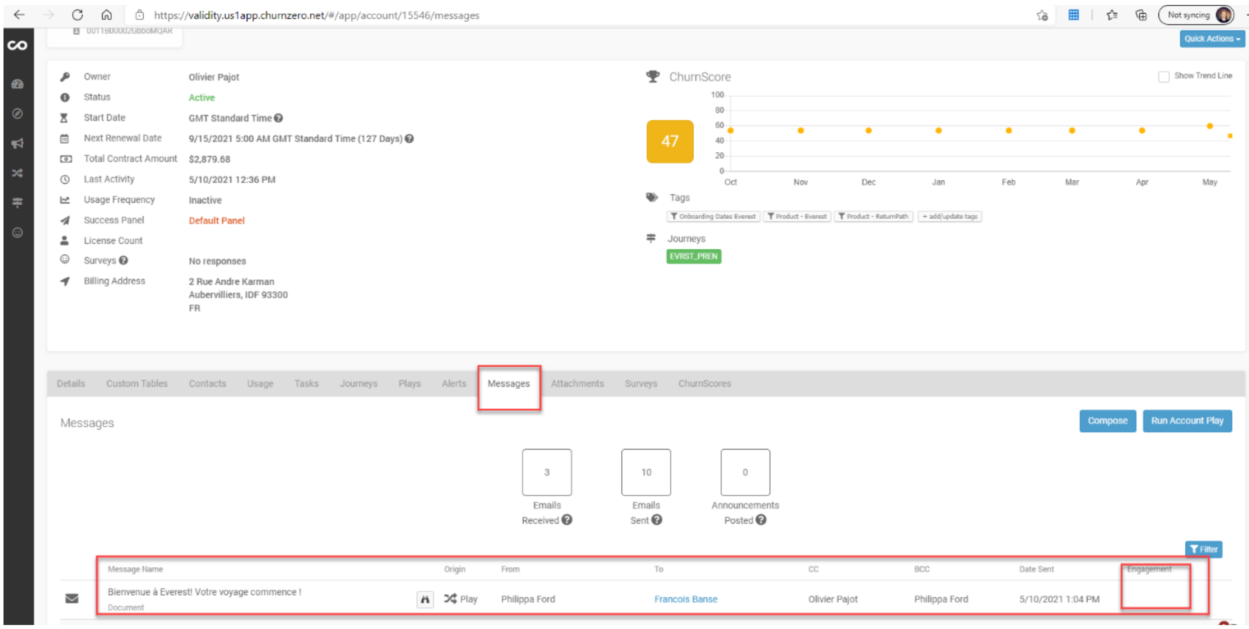
Go to My Everest > Account Settings > Activity Log Tab



Now check and see if you can see the owner's email address in the section "Performed By" and see if they logged in.

- If the client hasn't logged in:

This could be because they haven't received our Welcome email, you can check this by going back to ChurnZero and onto the client's account. Check the messages tab



You can see there the play you sent out yesterday, and look closer into the Engagement section, if it is empty it could be that the email went to their spam folder. I would then send them an email from your outlook:

TEMPLATE

Hello {Client}

I hope you are well. I wanted to reach out to you, to let you know your account in Everest has been provisioned.

You would have received your login details in a separate email and a welcome email with next steps. Please check your spam folder.

If you have not received your login credentials yet, simply go here and enter your email address as the username and request a password reset.

Thanks, have a nice day.

{Signature}

IN FRENCH

Bonjour {Client}

J’espère que vous allez bien. Je voulais vous informer que votre compte dans l’Everest a été provisionné.

Vous auriez dû recevoir vos informations de connexion dans un e-mail séparé et un email de bienvenue avec les prochaines étapes. Veuillez vérifier votre dossier spam.

Si vous n'avez pas encore reçu vos identifiants de connexion, visiter ce lien et entrez votre adresse e-mail comme nom d'utilisateur et demandez une réinitialisation du mot de passe.

Merci, passez une bonne journée.

{Signature}

- If the client has logged in successfully, check all the sections of Everest to see if they have started the implementation tasks, if they have tick them off in Chrunzero, if they haven't send them an email.

TEMPLATE

Hi {Client},

I hope you are well,

I wanted to see how you are getting on with the setup in Everest. I would suggest you start with the below tasks:

- send your campaigns to the Everest seed list (I have attached a short video on how to setup your seed list)
- set up Header Matching
- upload your lists to List Validation

We recommend setting up the seed list as soon as possible to have visibility into your deliverability intelligence. If you need any help with those tasks, please let me know.

If you would like to register for training please do so : Register for a live Everest training session – Validity Help Center (returnpath.com)

Thanks. Let me know if you have any questions,

{Signature}

Attach the step by step Seeding video

IN FRENCH

Bonjour {Client},

Vous pouvez ensuite commencer à configurer votre plateforme Everest, veuillez consulter votre liste de taches de la mise en œuvre de l'intégration. Je vous suggère de commencer par les tâches suivantes :

- Configurez votre profil de réputation pour avoir accès à votre score d'expéditeur sous Monitoring - > Reputation - > Monitoring Profiles (j'ai mis en pièce jointe une courte vidéo sur la façon de configurer votre Monitoring Profiles)

- Créez un Design Test : Cliquez simplement sur « New Design Test » et téléchargez votre contenu en copier-collant votre code HTML, en téléchargeant un fichier zip, en envoyant un test par courriel ou en tant qu'import à partir d'un test envoyé à la Seed List Everest Inbox.

- Envoyez vos campagnes à la Seed List Everest (j'ai mis en pièce jointe une courte vidéo sur la façon de configurer votre Seed List)

- Configurer votre Header Matching

- Importez vos listes dans List Validation

Nous vous recommandons d'établir votre Seed List le plus tôt possible pour avoir une visibilité sur votre intelligence de délivrabilité. Si vous avez besoin d'aide, faites-le-moi savoir.

Merci et bonne journée.

{Signature}

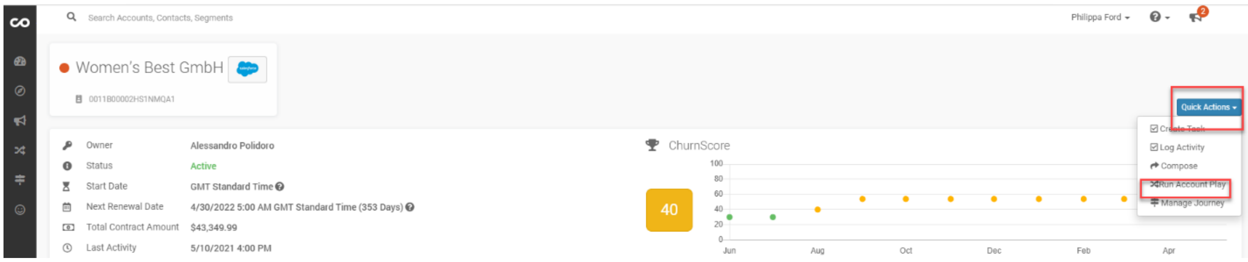
Attach the step by step Seeding video in French

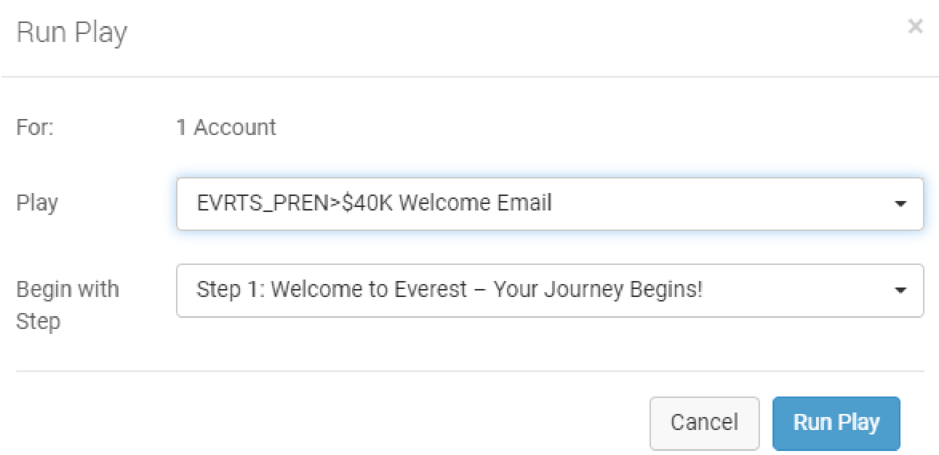
XII) Client Kick-Off call (paying over $40k)

If your client is paying over $40k per year, then you will need to send them the welcome play to schedule a kick-off call with you.

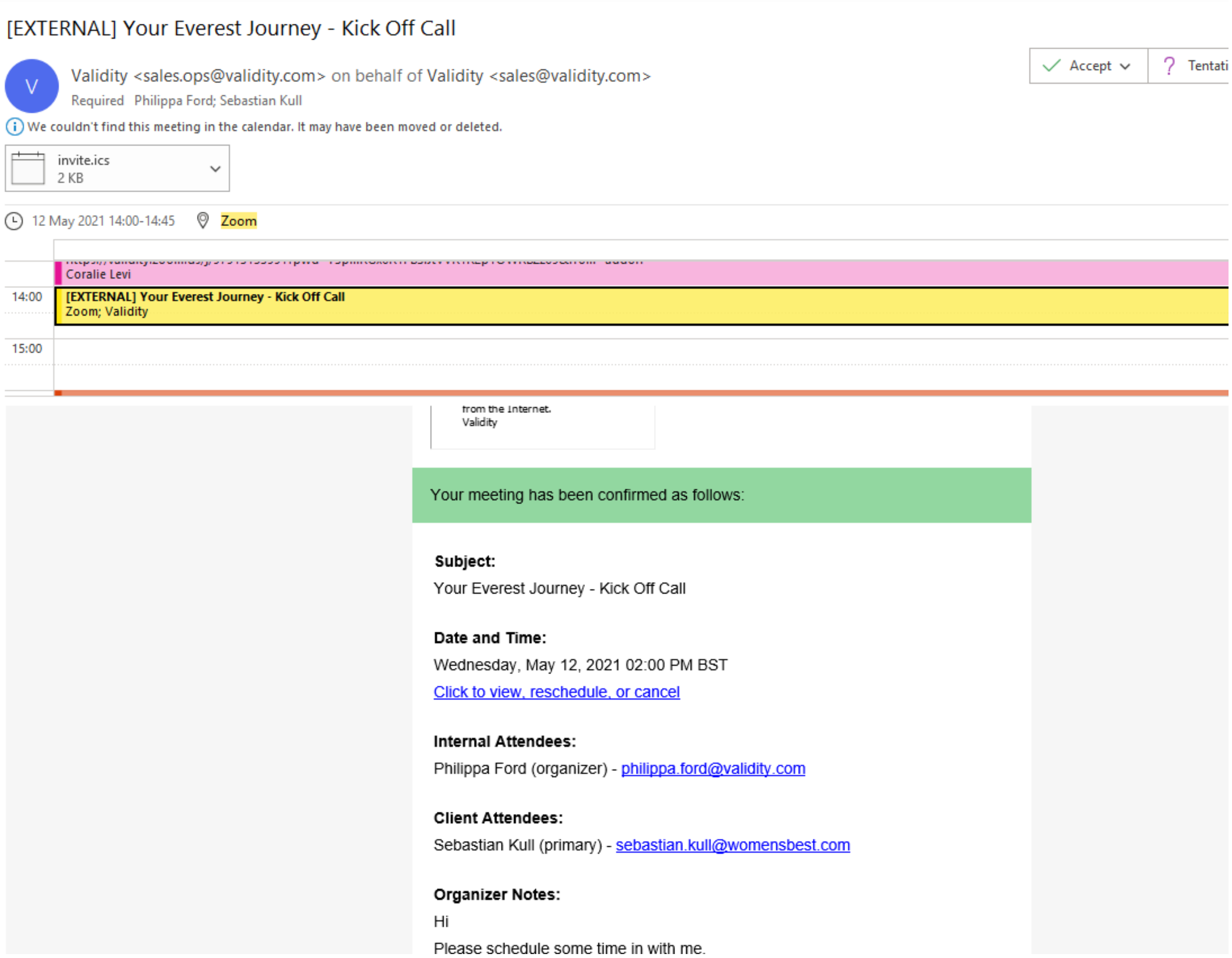
Go to ChurnZero and search for your client's account (or click on the name of your client under My Command Centre > My Segments)

Then to fire a play, go to quick actions > run account play





Once the client has scheduled a Kick-Off call with you using your TimeTrade link (that was in your play email), you will receive an email like this:



Accept the meeting.

You can Invite the CSM and PS colleagues if they want to join, they are not required, it is optional.

Now you need to prepare for the meeting, first download the PowerPoint slides you will use:

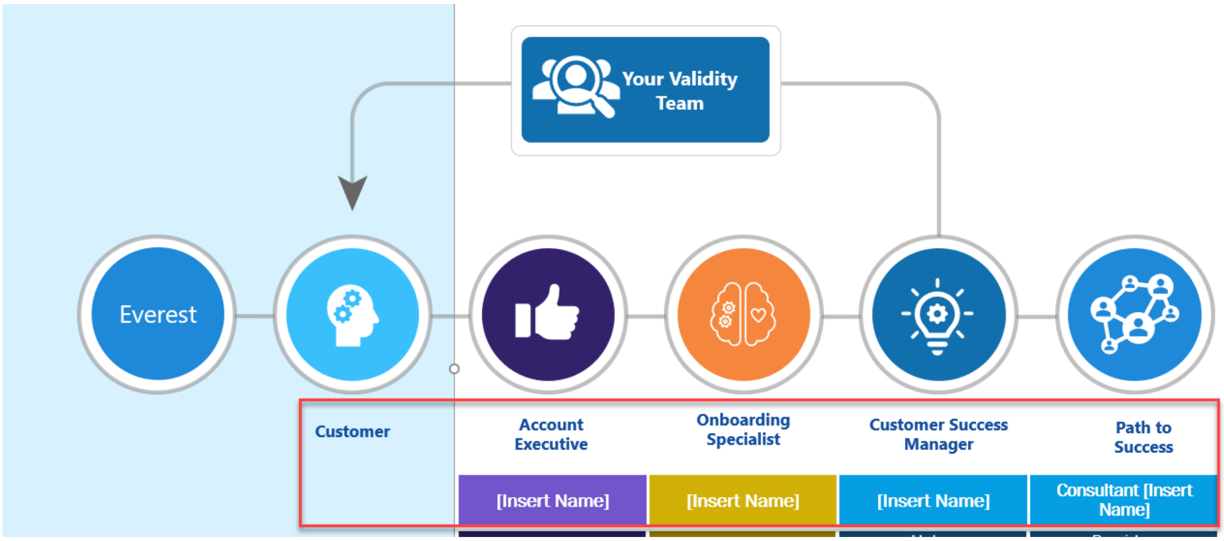
Group-Global Onboarding -> Documents -> Email Solutions -> Kick off call resources

Make sure you download a copy!

Now you need to update the slides to suite your clients needs.

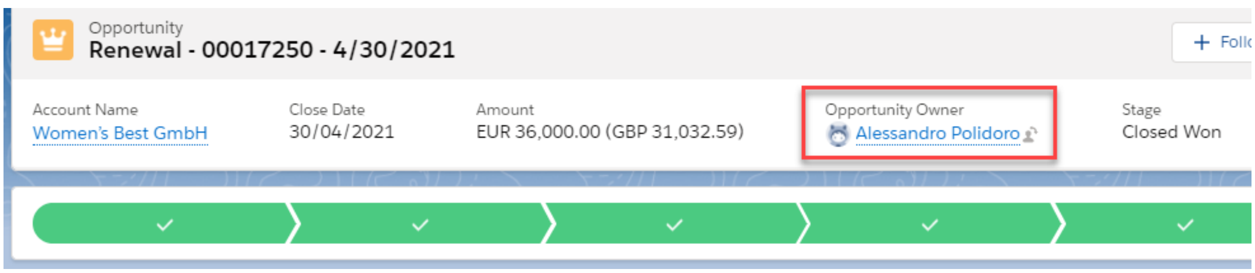
Slide 1 Add your Name.

Slide 5 Change these:

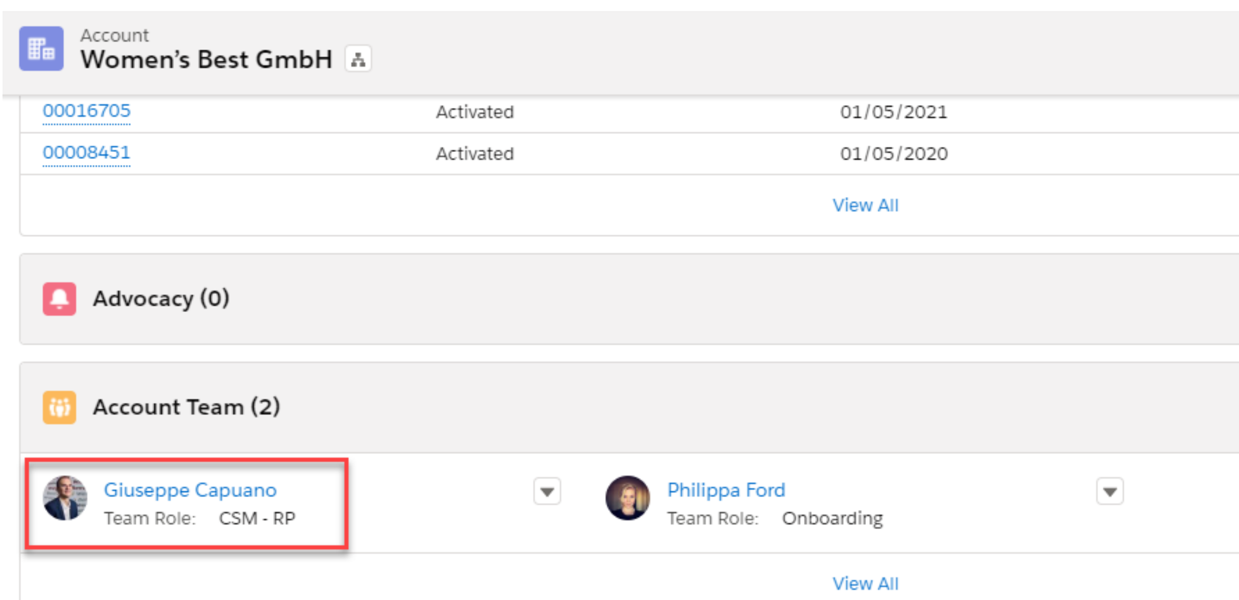


If they do not have Professional Services (PS) Delete the last section (Path to success)

To find out who the AE is (or CAE if renewal), you can check the opportunity owner in Salesforce:

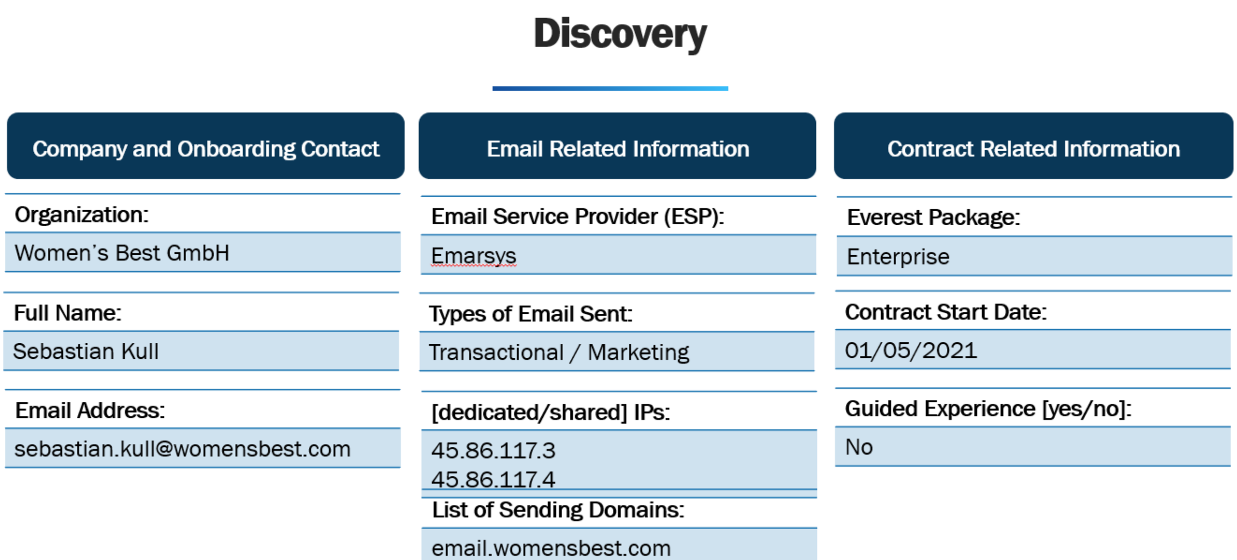


To find out who the CSM/PS is, you can check the account team in Salesforce (Go to the account > Related > Account Team)



Once updates it should look like this:

Slide 13: Update the fields with the information you have, if you do not have any of this information do not worry you can ask the client on the call and fill it in with them as you go.



All this information you can find on the opportunity (discovery notes)/contract in Salesforce. Also, if it is a migrating account, you can find information about IPs/Domains on their previous accounts (250ok or ReturnPath).

Slide 20: you will want to remove the 121 training if they are not paying over $90k

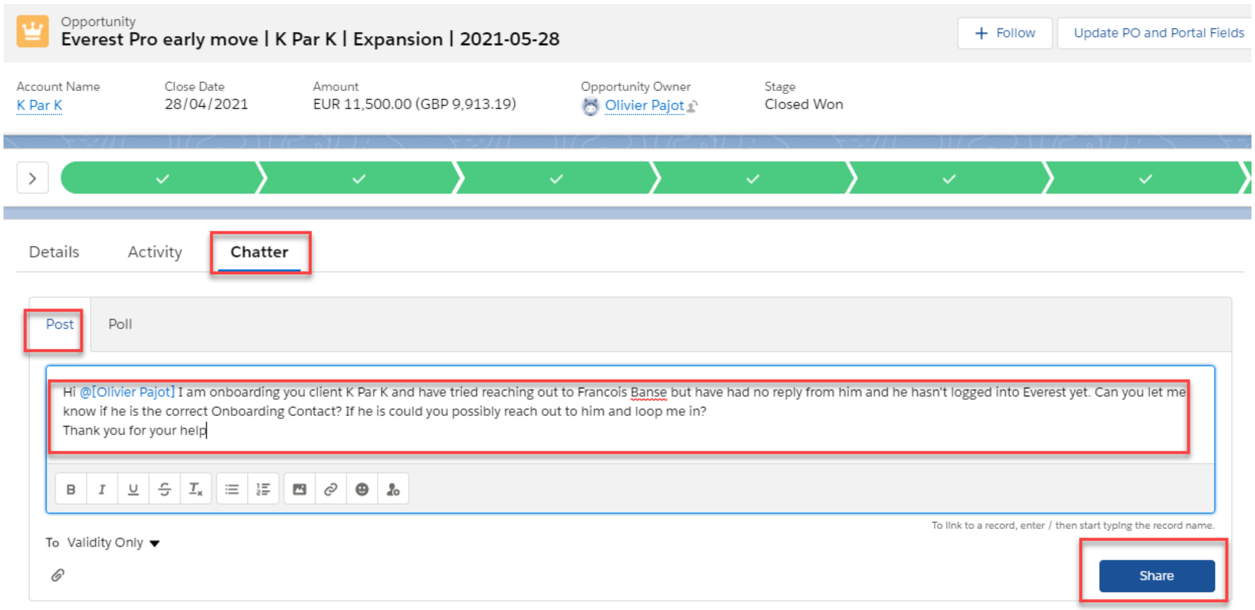
Now you are ready to have your Kick Off Call!

XIII) Checking correct onboarding contact

You still have not heard back from your client, and they still have not logged into Everest.

Now you need to contact the AE and find out if you have the correct onboarding contact.

Go into Salesforce and look up your client and the opportunity, Chatter the AE:



Wait for the AE's reply.

You will get a notification email like this:

[EXTERNAL] Olivier Pajot commented on your post on Opportunity: Everest Pro early move | K Par K | Expansion | 2

OP Olivier Pajot in Validity <reply@chatter.salesforce.com>
To Philippa Ford

If there are problems with how this message is displayed, click here to view it in a web browser.

Olivier Pajot

Hi Philippa
François is the good contact and normally he is almost reactive
Maybe you can try again next Monday
Thanks

View/Com or **reply to this email**

Original post

Everest Pro early move | K Par K | Expansion | 2021-05-28 — Philippa Ford to Validity Only
Wednesday, 12 May 2021 11:38

Hi **@Olivier Pajot** I am onboarding you client K Par K and have tried reaching out to Francois Banse but have had no reply from him and he hasn't logged into Everest yet. Can you let me know if he is the correct Onboarding Contact? If he is could you possibly reach out to him and loop me in?
Thank you for your help

Check again during the week if the client has logged into Everest,

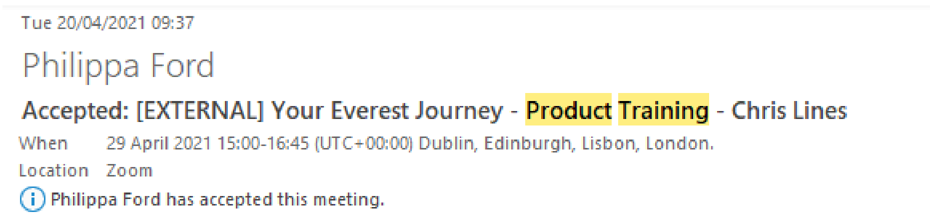
- if he has not, send him an "unresponsive email 1 play".
- If he has, you can check what task they have done and send them an email regarding what tasks are left to be done.

XIV) 121 Training

This is only available for clients paying over $90k.

You will need to send them the email play “EV_PREN>$90K On Track Individual Training”, so they can schedule a 90mins slot in your calendar.

You will get a notification by email once they have shcedule it so you can accept it:



Tue 20/04/2021 09:37

Philippa Ford

Accepted: [EXTERNAL] Your Everest Journey - Product Training - Chris Lines

When 29 April 2021 15:00-16:45 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.

Location Zoom

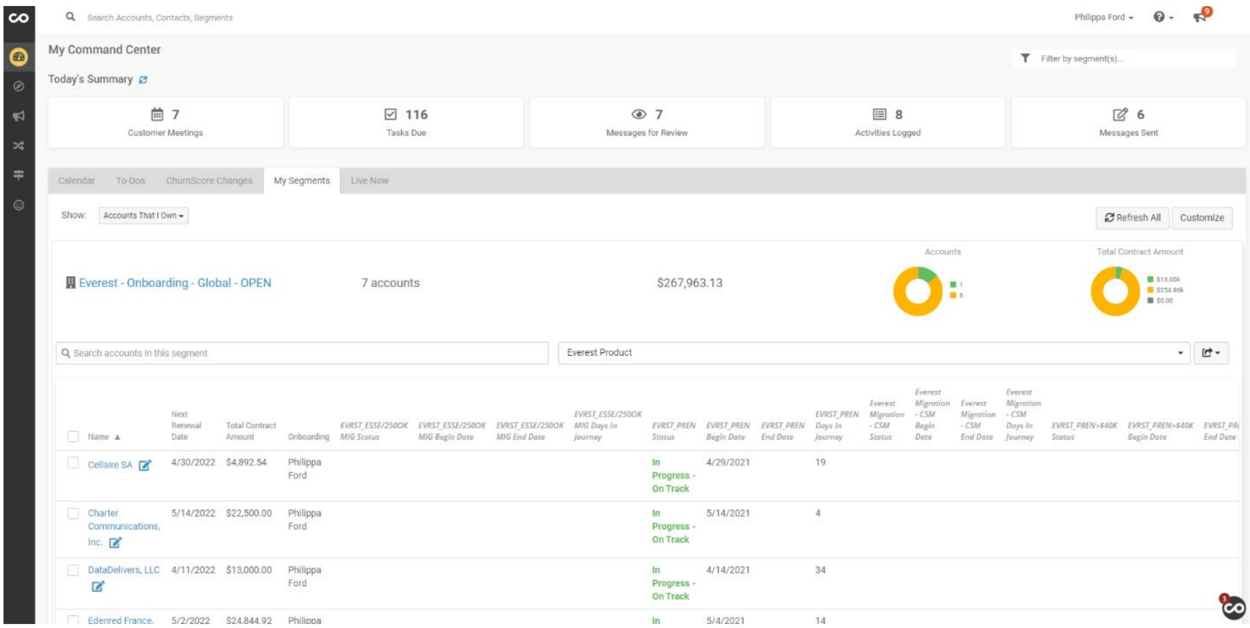
Philippa Ford has accepted this meeting.

XV) Following-up with clients

Keep checking your accounts once a week, unless your clients reach out with questions, then you may need to email and follow-up more often.

Tick off the tasks in ChurnZero as you go along.

I always have ChurnZero open on my Command Center > My Segment page, so I can see all my clients in one view and check them one by one, so I don't miss any.

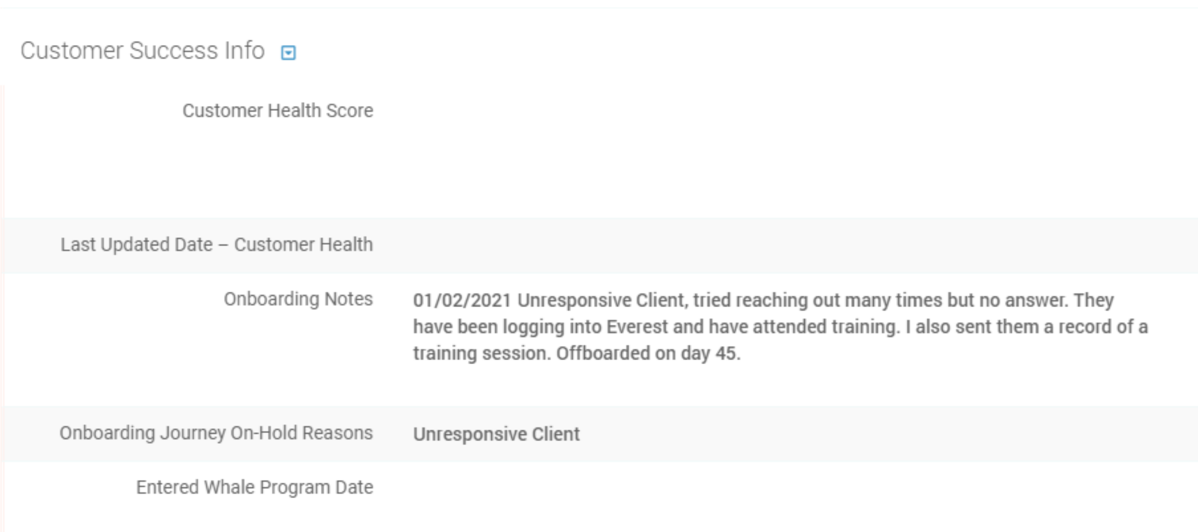


When I need to reply to a customer, I like to use short videos to show them if they don't understand, I send them help centre articles too but I find clients like to be told and not click through and read pages and pages… So short videos are definietly a good idea, you can use Snagit to record them, make sure you have on the Video setting and your microphone is enabled.

XVI) Client Unresponsive

The flow would go something like this:

1) Provisioned the account
2) You emailed them on Day 2 to check they can log in
3) Day 3 you check with the AE you have the correct contact
4) Day 7 you email them unresponsive email 1
5) Day 14 you email them unresponsive email 2
6) Day 21 you let them know again if they need any help to contact you
7) Day 28 you warn them you will offboard them after 45 days
8) Day 45 you offboard them by manually completing the milestones in the journey without ticking the tasks. You add a note in the onboarding notes:



You send them the offboarding unresponsive play, you must CC in the CAE and their CSM if they have one.

Hello {{Contact First Name}},

Great work! It looks like you've completed the most critical of your onboarding tasks. Now, on to the next phase in your journey: using Everest to achieve the outcomes you care most about. We'll help you along the way.

****THIS PARAGRAPH GOES BEFORE THE LAST PARAGRAPH IN THE TEMPLATE, JUST ADD ANY EXTRA INFORMATION AND THE CSM INFORMATION AND CONTACT BELOW.

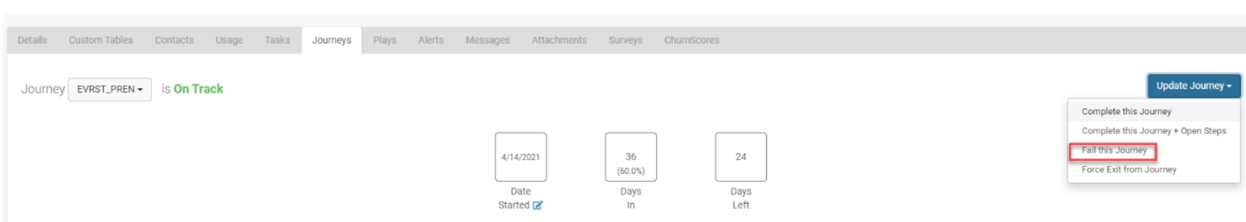
[[assigned CSM]]

- There are a rich set of resources available to you in the Validity Help Center. In particular, we find that customers just setting out find these particularly useful:
  - Set Up Alerts to tune out the noise and focus on what matters most
  - Set Up Dashboards to visualize your data and discover trends with power and simplicity
- In the meantime, if you have any questions, our world-class Support Team is here for you:
  - support@validity.com
  - Chat: In-product
  - phone: 1-800-961-8205

It has been a pleasure working with you,

{{accountRole_6.name}}

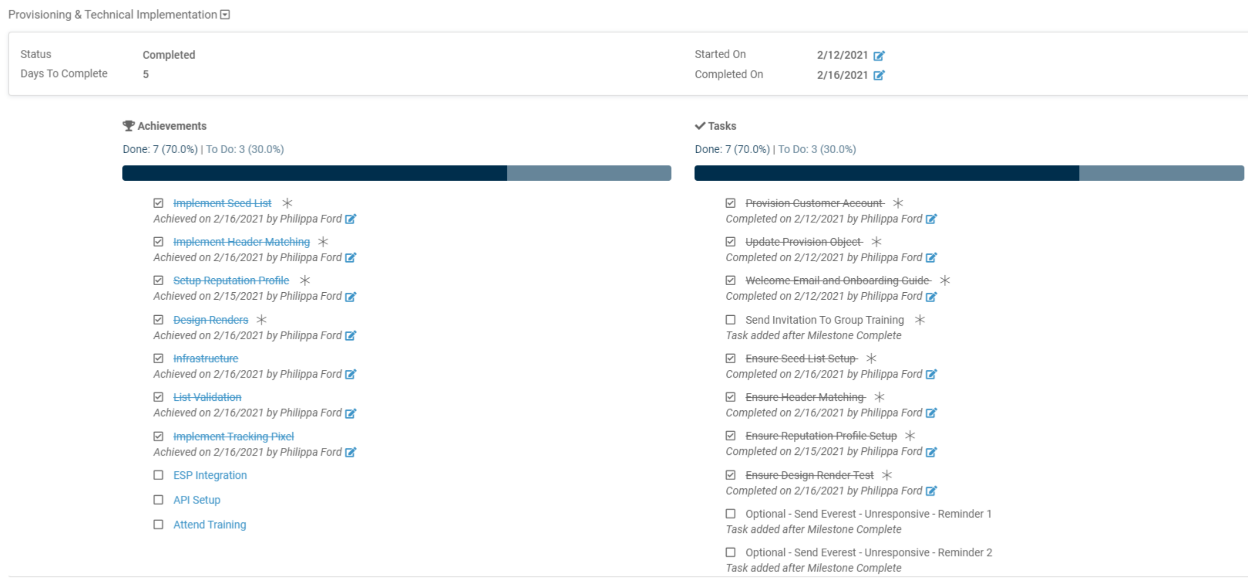
And you manually update the journey as failed (as they did not complete onboarding)

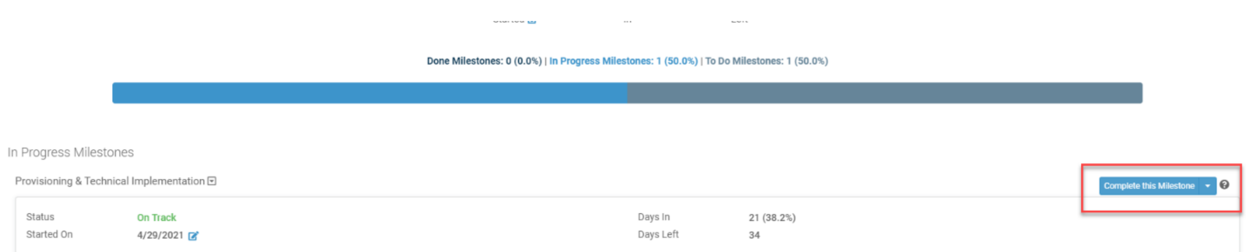


XVII) Offboarding a responsive client

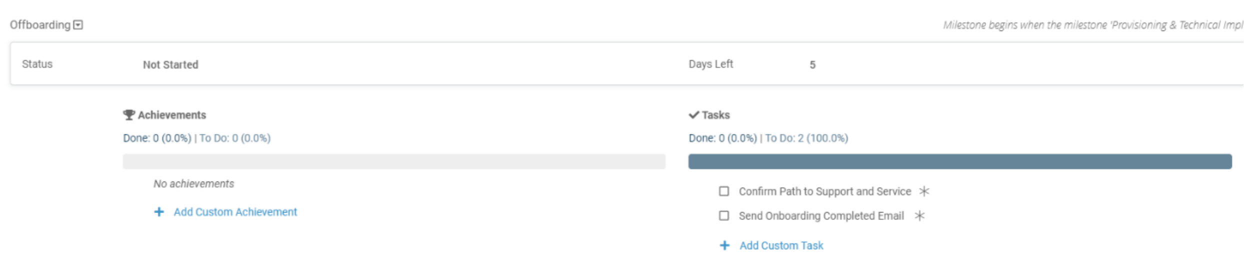
- If they have completed all the required tasks and they are ready to be offboarded (if they wanted optional setup help for example, Feedback Loops, and this was also completed)

In ChurnZero, you complete all the relevant task and click on complete Milestone (if this is not done automatically)

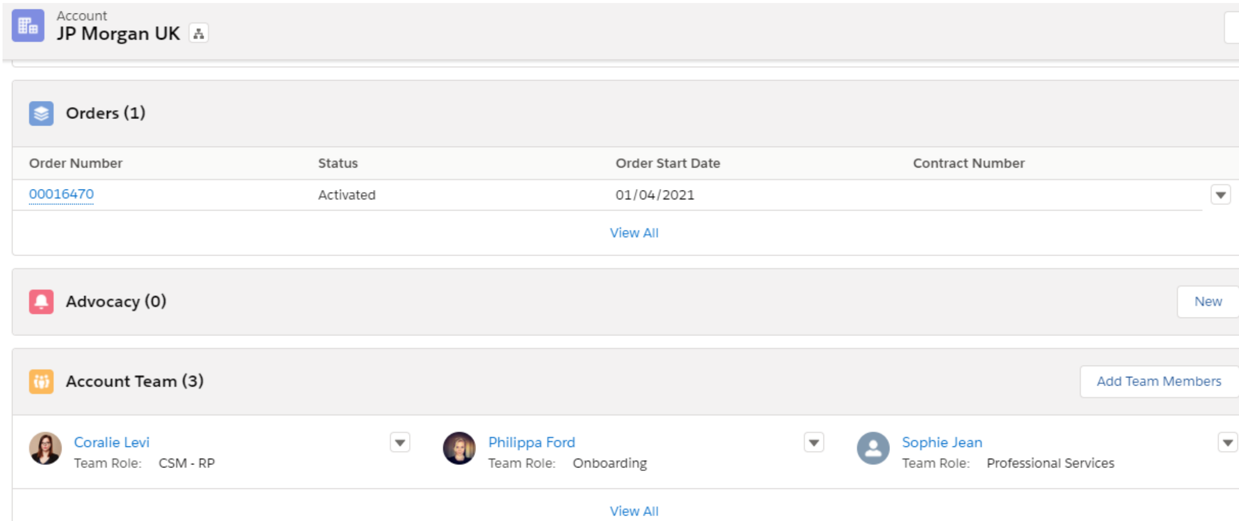




Then you will start the offboarding milestone



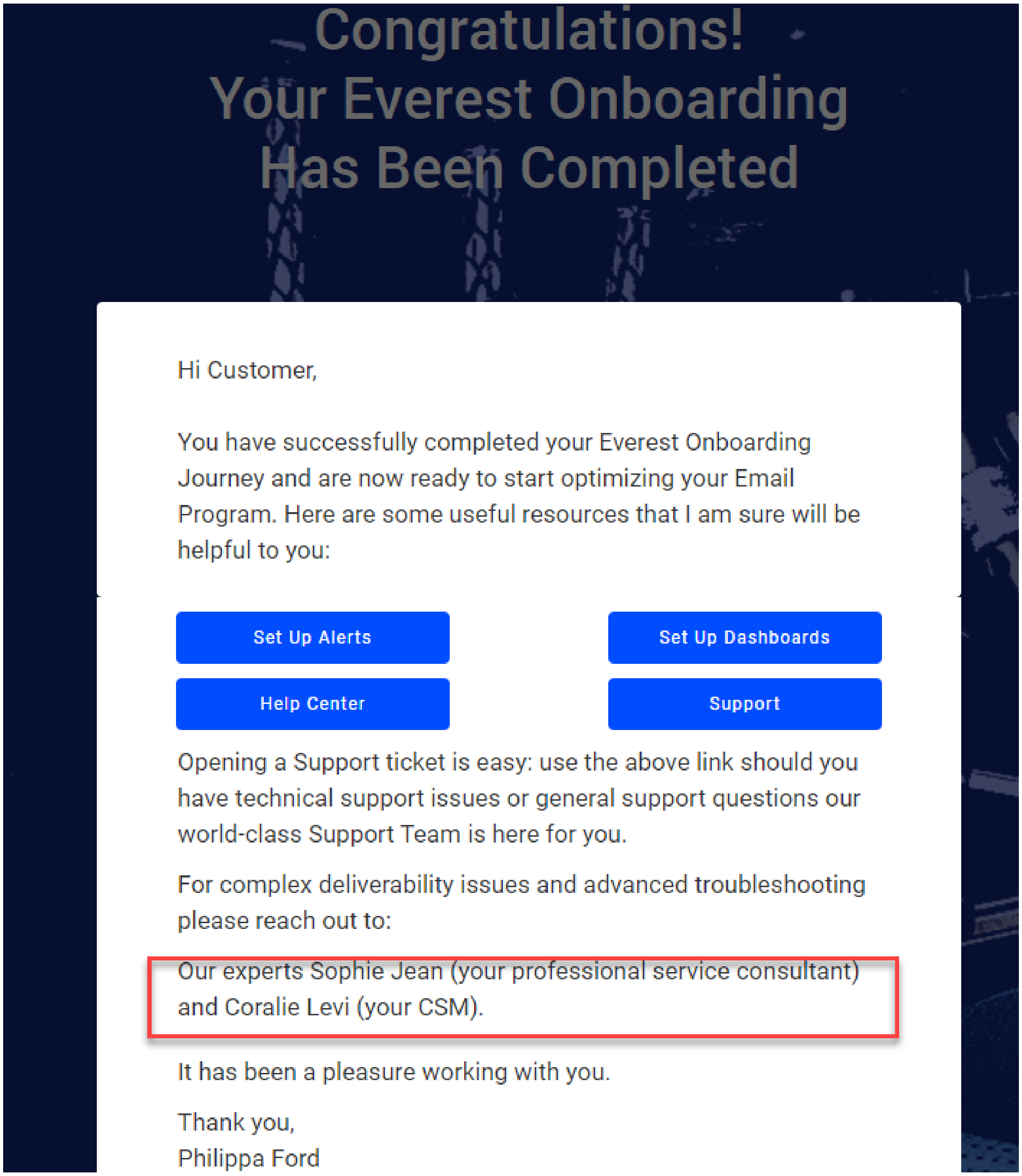
If a customer is paying over $40k they have a CSM, so you will need to go to Salesforce and check who the CSM is in the account team section:



They sometimes also can have PS (professional services).

You must include both PS & CSM contacts in your offboarding email and introduce them.

Launch the correct offboarding play and introduce as needed. Also don't forget to CC in the CAE (you can find who this is by going to Salesforce on the account and checking who the renewal opportunity owner is)



Congratulations!
Your Everest Onboarding
Has Been Completed

Hi Customer,

You have successfully completed your Everest Onboarding Journey and are now ready to start optimizing your Email Program. Here are some useful resources that I am sure will be helpful to you:

Set Up Alerts | Set Up Dashboards

Help Center | Support

Opening a Support ticket is easy: use the above link should you have technical support issues or general support questions our world-class Support Team is here for you.

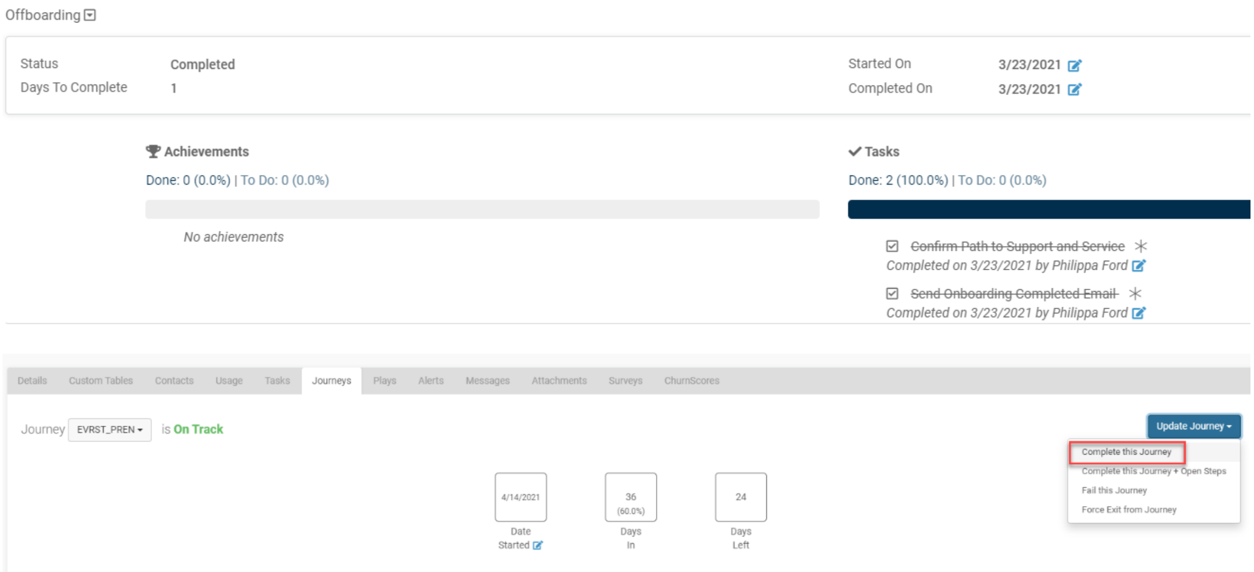
For complex deliverability issues and advanced troubleshooting please reach out to:

Our experts Sophie Jean (your professional service consultant) and Coralie Levi (your CSM).

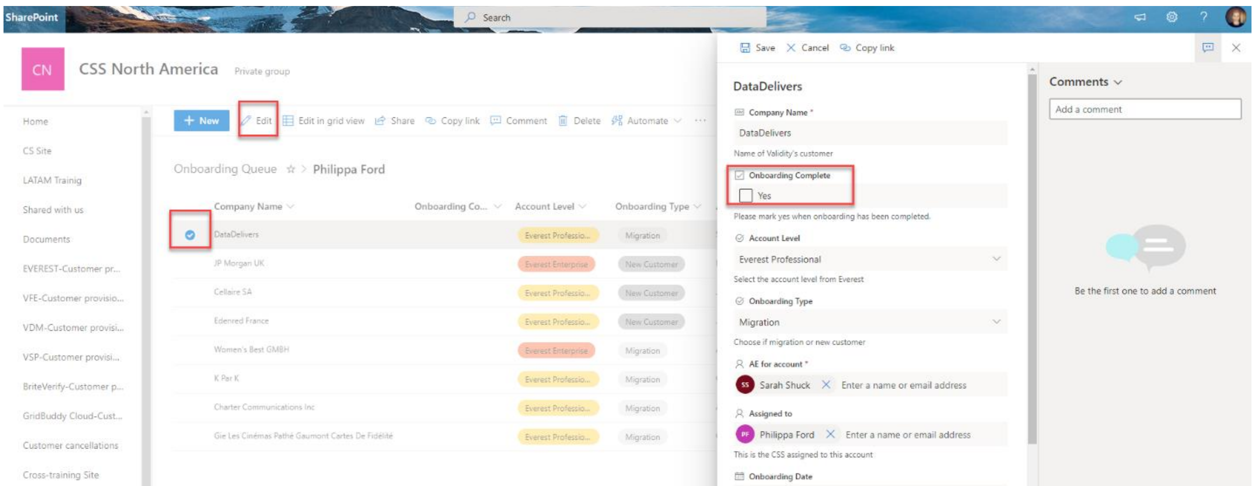
It has been a pleasure working with you.

Thank you,
Philippa Ford

Once you have sent this you may tick the task and it should automatically complete the journey. If it doesn't then manually complete the journey.



Then go to SharePoint and complete the onboarding, find your account, tick the box, click Edit then check the box as Yes for Onboarding complete



XVIII) Optional implementation steps

Sometimes the clients want to implement other steps, such as the Pixel.

I would send them the pdf guide here.

I also have a few short videos for various Everest setups that I send to my clients, you can find them here.

XIX) Troubleshooting

Sometimes I research the zendesk tickets, as more than often another client has already asked the question.

I would look up the FAQs file, here.

Use the help center articles.

Even the slack channels (#cs-everest-faqs #tams #vfe-all) and ask.

If all else fails, I open a support ticket.