

ONBOARDING EVEREST GUIDE

Philippa Ford

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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



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:

The screenshot shows the Salesforce Lightning interface. The browser address bar displays the URL `https://validity.lightning.force.com/lightning/page/home`. The navigation bar includes tabs for Sales, Home, Opportunities, Quotes, and Tasks. The main content area features a 'Today's Events' section with a calendar icon and the text 'Looks like you're free and clear the rest of the day.' Below this is a 'View Calendar' link and a 'Recent Records' section. A search dropdown is open on the right, showing results for the search term 'K par K'. The results include 'K Par K contacts', 'K Par K accounts', and 'K Par K opportunities'. A red box highlights the 'K Par K Account' result, which is the first account listed. Other results include 'Everest Pro early move | K Par K | Expansion | 2021-05-28 Opportunity - K Par K', 'K par K | SFMC Resale| Starter Plus Package Opportunity - K Par K', 'K Par K - Return Path - Starter Plus Provision', and 'K Par K - Verifications Provision'.

Go to the Related tab in Salesforce.

K Par K | Salesforce x CSS North America - Onboarding x +

https://validity.lightning.force.com/lightning/r/Account/0011B00002GbboMQAR/

Search: K par K

Sales Home Opportunities Quotes Tasks Files Notes Accounts Cor

Account **K Par K**

Phone: +33171510927 Website: www.kpark.fr Type: Reseller Account Classification: Reseller Customer Account Owner: Olivier Pajot

Details **Related** Zendesk News Product Info ChurnZero ZoomInfo

Contacts (3)

<p>Daniel Angulo</p> <p>Title: Chef De Projet Transformation Che...</p> <p>Email: daniel.angulo@kpark.fr</p> <p>Phone: +33171510927</p>	<p>Francois Banse</p> <p>Title: Resonsable Information Technology</p> <p>Email: francois.banse@kpark.fr</p> <p>Phone: +33171510927</p>
--	---

[View All](#)

Opportunities (4)

<p>Renewal - 00024783 - 5/9/2022</p> <p>Stage: Special Project/Not Started</p> <p>Type: Renewal</p> <p>Forecasting B... EUR 5,000.00 (GBP 4,327.11)</p>	<p>Renewal - 00020447 - 9/15/2021</p> <p>Stage: Special Project/Not Started</p> <p>Type: Renewal</p> <p>Forecasting B... USD 4,319.53 (GBP 3,104.40)</p>
<p>K par K SFMC Resale Starter Plus Package</p> <p>Stage: Closed Won</p> <p>Type: New Business</p> <p>Forecasting B... USD 2,879.68 (GBP 2,216.49)</p>	

[View All](#)

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

The screenshot shows a web browser with four tabs: 'K Par K | Salesforce', '00024783 | Salesforce', 'Everest Pro early move | K Par K', and 'K Par K - Everest Professional -'. The address bar displays the URL: <https://validity.lightning.force.com/lightning/r/Account/0011B00002GbboMQAR/view>. The Salesforce navigation bar includes the logo, a search box with 'K par K', and menu items: Sales, Home, Opportunities, Quotes, Tasks, Files, Notes, Accounts, Contacts, and Campaigns. Below the navigation bar, the page header shows 'Account K Par K' with a sub-account icon.

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.

The screenshot shows a Salesforce Opportunity record. The main content area displays various fields such as 'PeopleImport Expiration', 'Renewal Amount', 'DupeBlocker Expiration', and 'Partner Referral/Reseller Info'. The right sidebar contains a 'Files (2)' section and a 'Notes & Attachments (3)' section. A red box highlights the file 'IO KparK signed' in both sections. The file details are: 'IO KparK signed', '28-Apr-2021', '898KB', 'pdf'.

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

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1/3

ocuSign Envelope ID: CACF9CE9-D692-4868-8F1E-75E756C25DC9

*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 K Par K	Status Activated	Contract Start Date 10/05/2021	Contract End Date 09/05/2022	Contract Term (months) 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 provisioning 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:

The screenshot shows two sections from a Salesforce interface. The top section, titled 'Opportunities (4)', lists four items. The first three are 'Renewal' type contracts with various stages and forecasting values. The fourth item, 'K par K | SFMC Resale| Starter Plus Package', is highlighted with a red box. It has a 'Closed Won' stage and a 'New Business' type. The bottom section, titled 'Contracts (2)', lists two active contracts. The second contract, '00020447', is highlighted with a red box. It has an end date of 15/09/2021 and a value of USD 2,879.68 (GBP 2,069.60).

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

The screenshot shows the 'Administer Accounts' page in the Return Path Internal Tools. The search bar contains 'kpar' and a dropdown menu shows 'KparK 510000392' highlighted with a red box. The 'Show Inactive' checkbox is also checked and highlighted with a red box. Below the search bar, a table lists accounts. The first row is 'CPFL Paulista 514006855' with a status of '✓', 1 user, and account type 'DAS 1 Child Account Billable'.

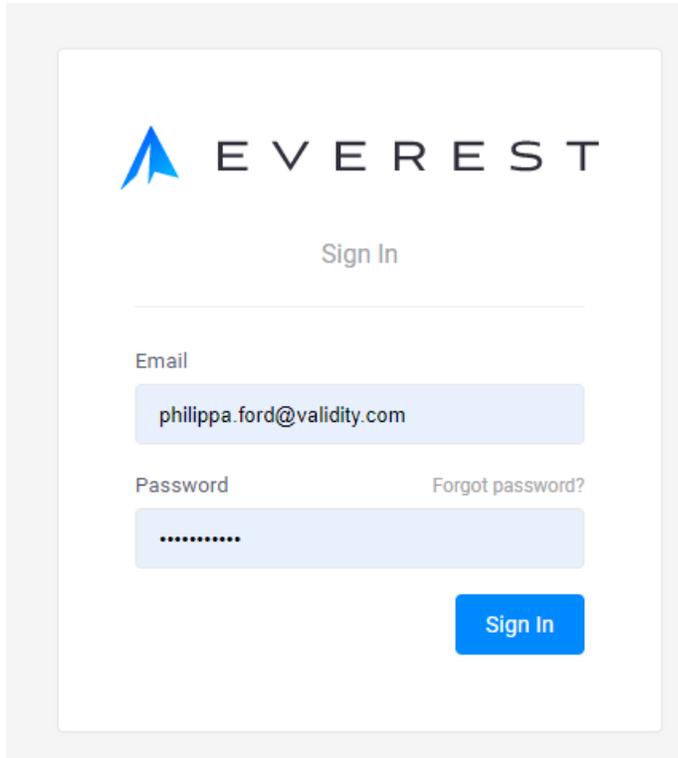
*make sure "show inactive" Is ticked.

The screenshot shows the 'Manage Accounts' page in the 250ok application. The search bar contains 'kpar' and the results table is empty, displaying 'No data available in table'. The page includes a sidebar with navigation options like 'Dashboard', 'Metrics', 'Reputation', 'Dynamic', and 'Analytics'.

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

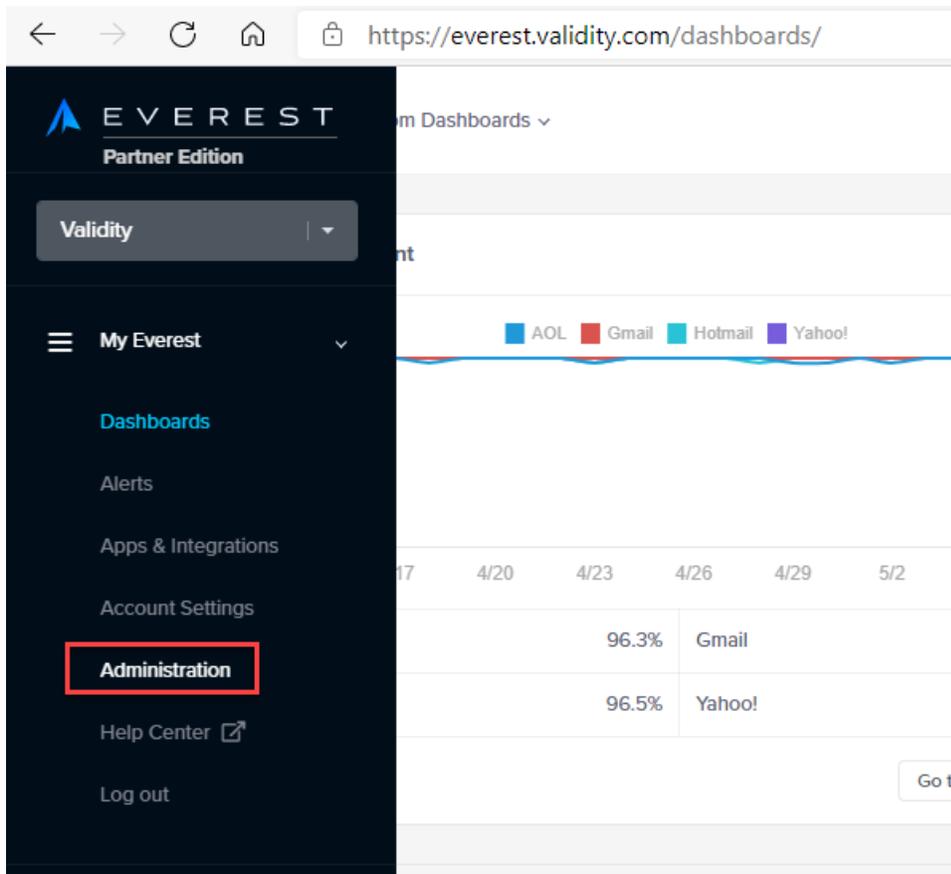
IV) Provisioning in Everest

Login to Everest [Login: Validity](#)

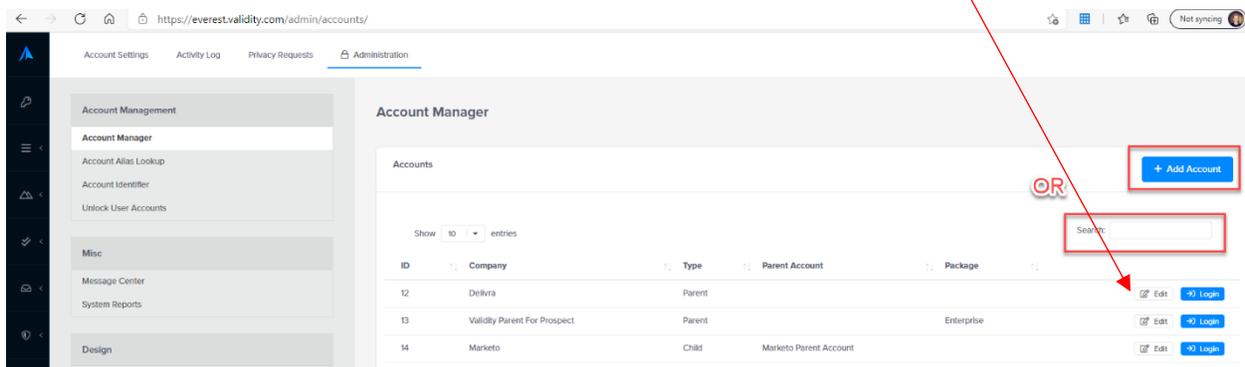


The screenshot shows the Everest login interface. At the top left is the Everest logo, a blue stylized mountain peak. To its right, the word "EVEREST" is written in a large, spaced-out, black, sans-serif font. Below the logo and name, the text "Sign In" is centered. A horizontal line separates the header from the input fields. There are two input fields: "Email" and "Password". The "Email" field contains the text "philippa.ford@validity.com". The "Password" field contains a series of dots. To the right of the "Password" field is a link that says "Forgot password?". Below the input fields is a blue button with the text "Sign In".

Go to Administration



- If it is a new account click on the blue + Add Account
- If it is a Migration, search 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:

← → ↻ 🏠 <https://mtools.returnpath.net/assurance/account>

Return Path Internal Tools

Main Menu : [Delivery Assurance](#) : [Administer Accounts](#)

K par K 510000392 child company of *SFMC SOLD ACCOUNTS [Move this company](#)

[Account Settings](#) [Products](#) [Users](#) [Child Companies](#) [Security Settings](#) [Engagement](#) [Hi](#)

Products for K par K 510000392

Action Plan (BETA - DO NOT USE)

Certification

Sub-products

Certification Alerts (BETA)

Certification SF Community Forum

Configuration Options

SSC Group ID: Enter the Bond Group ID from SSC

Child Account Management

Client Profile [Export Whitelisting Questions](#) [Export The](#)

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

Competitive Intelligence

Certification

Partner Edition

Hidden features:

Validation

Return Path Inbox Placement History

Primary account owner email:

philippa.ford@validity.com

Maximum user accounts: ?

10

Certification

Bond ID:

0

- 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

The screenshot shows a Salesforce Opportunity record with the following details:

- Opportunity Name:** Everest Pro early move | K Par K | Expansion | 2021-05-28
- Lead Source:** Existing Customer
- Amount:** EUR 11,500.00 (GBP 9,913.19)
- Sales Region:** EMEA
- Project Code:** SFMC0920
- Created By:** Olivier Pajot, 28/04/2021 09:56
- Discovery Notes:** this is part of the SFMC migration to Everest project . early move migration for K par K
- Primary Contact:** Francois Banse (highlighted with a red box)
- Probability (%):** 100%

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:

- 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
 - iDNS Classification Queue
 - Reputation
 - Profile Item Checker (Trap Fanout)
 - Migrate Reputation Profiles
 - REL Manager
 - Inbox
 - Unlock Inbox Overages

Edit Account

[Edit Account](#) [Inbox Headers](#) [Login History](#) [Send Sample Test](#)

[Remove Account](#) [View Account](#)

Account Name	<input type="text" value="K par K"/>
Parent Account	<input type="text" value="Parent account"/> <small>This is an auto complete field. Start typing the name of an account or an Afd.</small>
Salesforce ID:	<input type="text" value="001B00002Gbb0MQAR"/>
External ID: ⓘ	<input type="text" value="10476846033"/>
Include in global stats:	<input checked="" type="checkbox"/> Yes
<hr/>	
Edition:	<input type="text" value="Professional"/>
Volume Tier:	<input type="text" value="2 (< 3M)"/>
Start date:	<input type="text" value="05/10/2021"/>
Expiration date:	<input type="text" value="05/09/2022"/>
Add-ons:	<input type="checkbox"/> Validation <input type="checkbox"/> Seedlist Optimization <input type="checkbox"/> Design & Content <input type="checkbox"/> View Time Optimization (VTO) <input type="checkbox"/> Competitive Intelligence <input type="checkbox"/> Certification

Hidden features: Validation
 Return Path Inbox Placement History

Primary account owner email:

Maximum user accounts:

Certification

Placement

Seedlist group:

Annual placement events:

Used events:

Reputation

IPs and domains:

Blocklist group:

Design & Content

Annual design tests:

Tests used:

Engagement

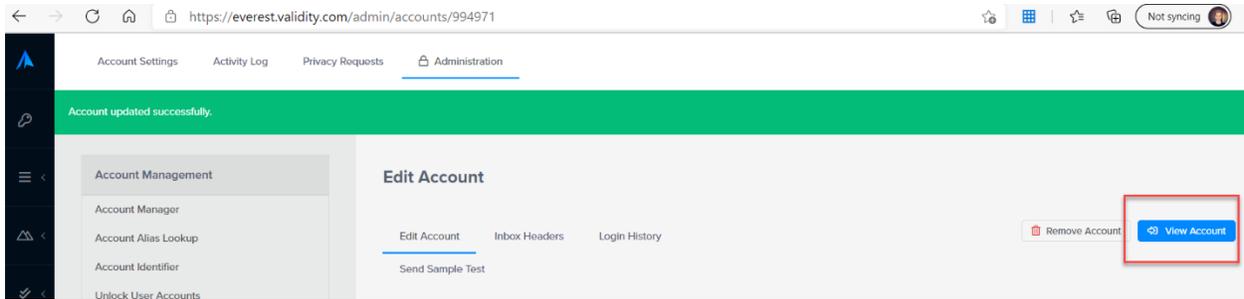
Annual open events:

Validation

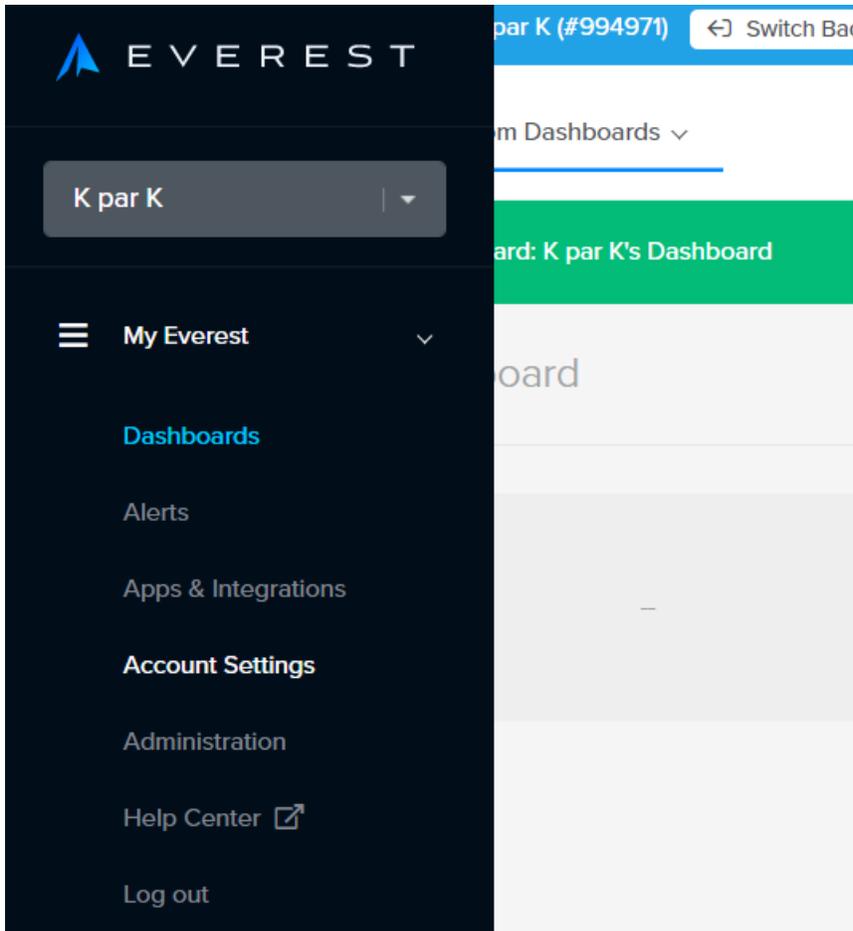
Annual verification credits:

Then click Save.

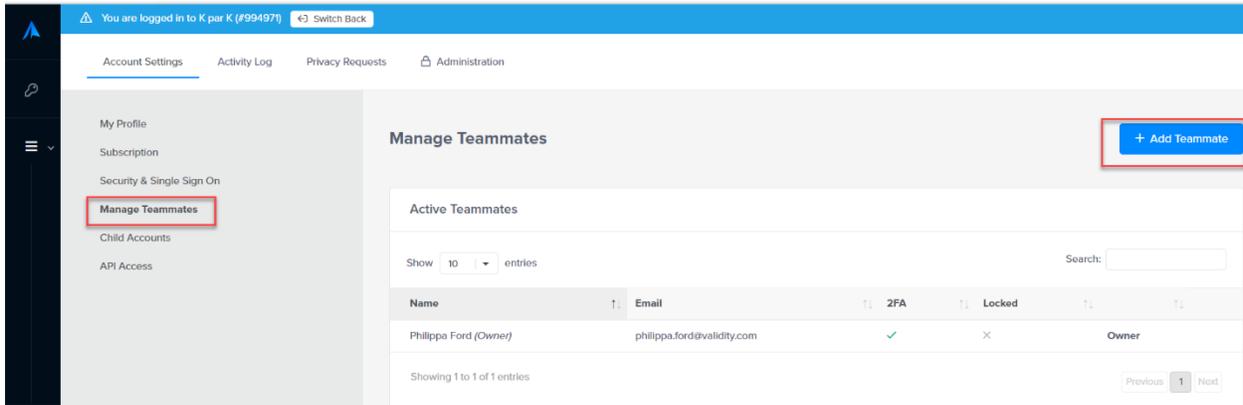
IF YOU NEED TO CHANGE THE "PRIMARY ACCOUNT OWNER" because it is a migrating account, Click on View account



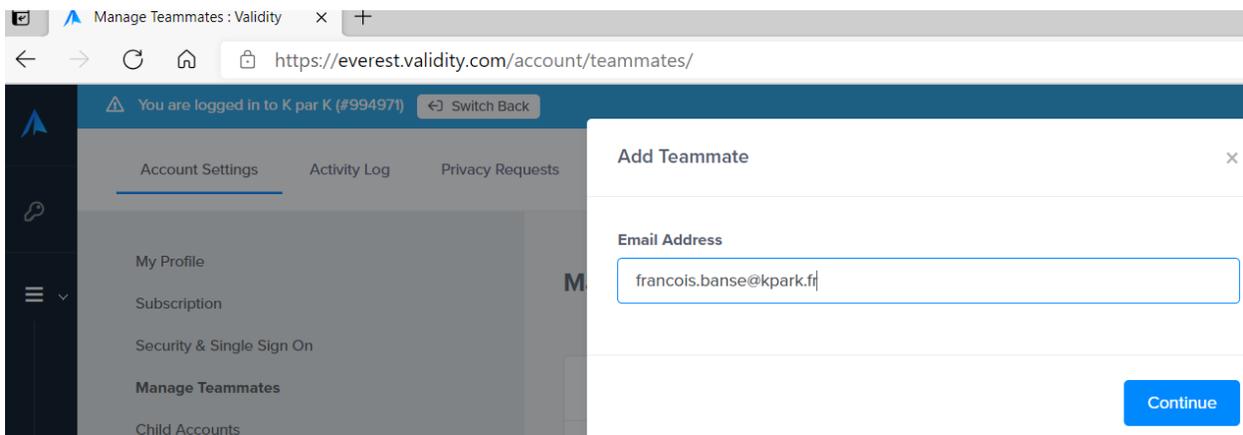
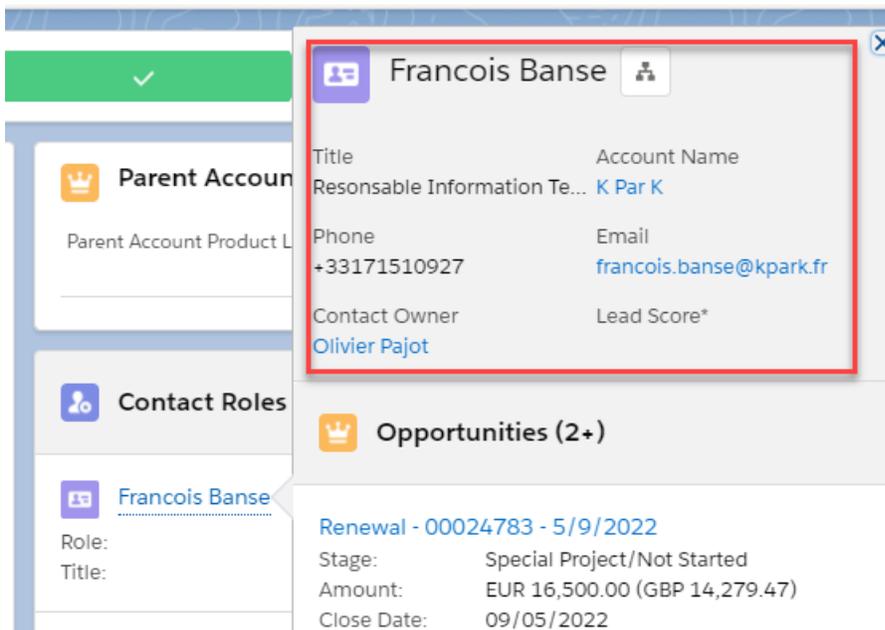
Go to account settings:



And Manage Teammates > + Add Teammates



Add the email address that is in Salesforce:



And add in all the other details

Add Teammate



francois.banse@kpark.fr

First Name

Francois

Last Name

Banse

Title

Resonsable Information Technology

Phone Number

+33171510927

New Password *

.....

Verify Password *

.....

- Force password reset next login
- Email user their account credentials

Add Teammate

And make sure you tick the last 2 boxes.

Click Add Teammate

Manage Teammates

+ Add Teammate

Active Teammates					
Show	10	entries	Search: <input type="text"/>		
Name	Email	2FA	Locked		
Francois Banse	francois.banse@kpark.fr	×	×	User	⋮
Philippa Ford (Owner)	philippa.ford@validity.com	✓	×	○	Promote to Admin

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

<https://everest.validity.com/admin/accounts/994971>

Expiration date:

Add-ons:

- Validation
- Seedlist Optimization
- Design & Content
- View Time Optimization (VTO)
- Competitive Intelligence
- Certification
- Partner Edition

Hidden features:

- Validation
- Return Path Inbox Placement History

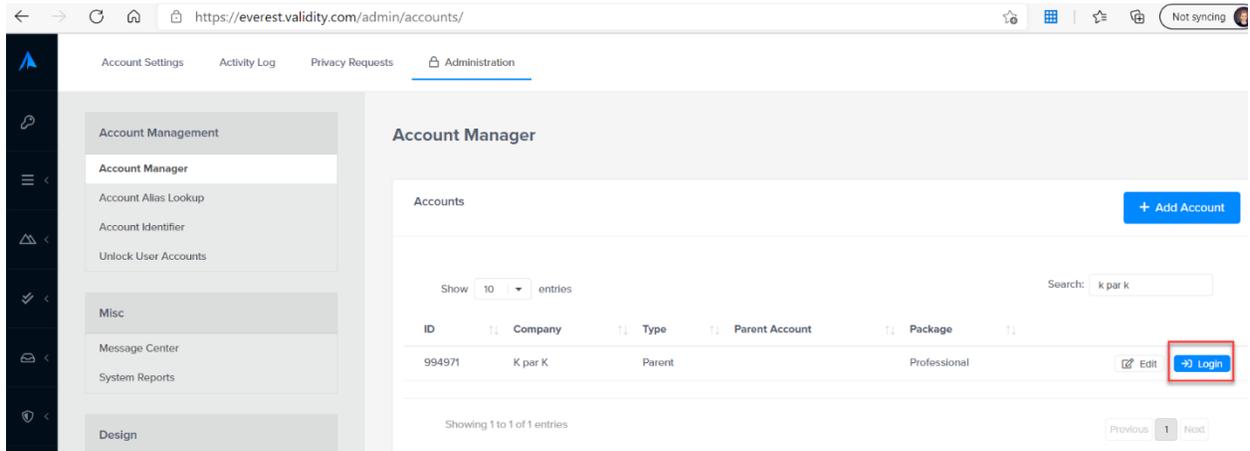
Primary account owner email:

Maximum user accounts:

Click save

V) Everest settings

Login to the account



The screenshot shows the Everest Validity Admin interface. The browser address bar displays <https://everest.validity.com/admin/accounts/>. The navigation menu includes Account Settings, Activity Log, Privacy Requests, and Administration. The main content area is titled "Account Manager" and displays a table of accounts. The table has columns for ID, Company, Type, Parent Account, and Package. A search bar is present above the table, and a "+ Add Account" button is in the top right. The "Login" button for the account "K par K" is highlighted with a red box.

ID	Company	Type	Parent Account	Package	
994971	K par K	Parent		Professional	Edit Login

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



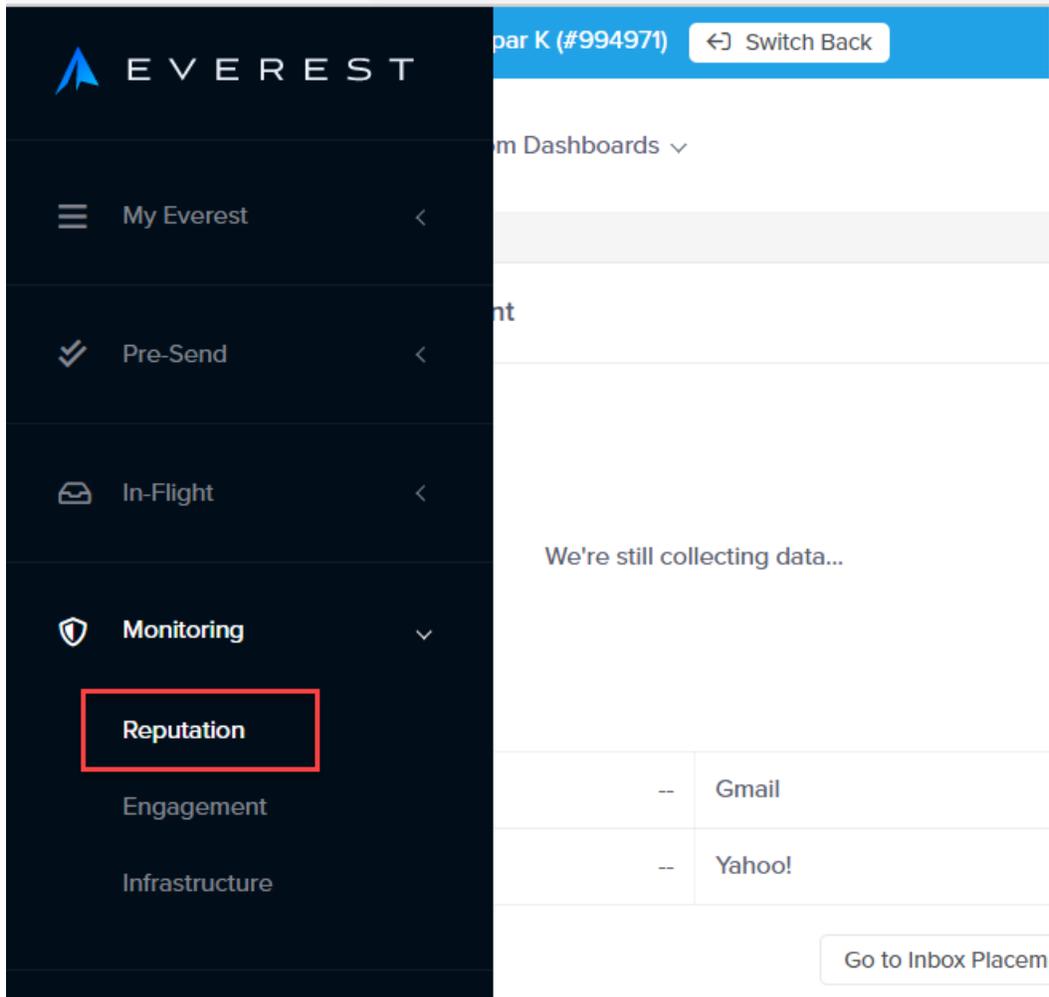
Opportunity

Everest Pro early move | K Par K | Expansion | 2021-05-28

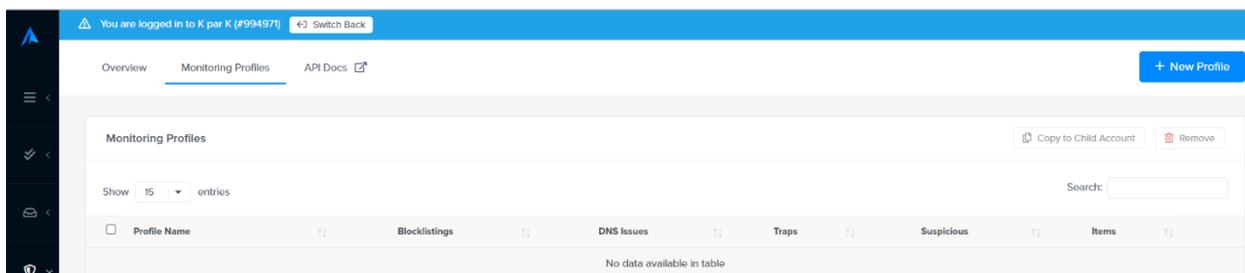
Cross-Sell		LV
Lead Source		Am
Existing Customer		EU
License Agreement		Ne Clk
Sales Region		Ne
EMEA		
Project Code		Pri
SFMC0920		Fre
Total Number of CRM Users		On
Opportunity Age		MC
0.00		
Created By		SD
Olivier Pajot, 28/04/2021 09:56		
Discovery Notes		SD
this is part of the SFMC migration to Everest project . early move migration for K par K		
Email Service Provider (ESP)		Qu
Other ESP		Prc
Directors Notes Last Updated		10 Los
SFMC Customer ID		Los

If there is a list of IPs/Domains

Go to Monitoring>Reputation



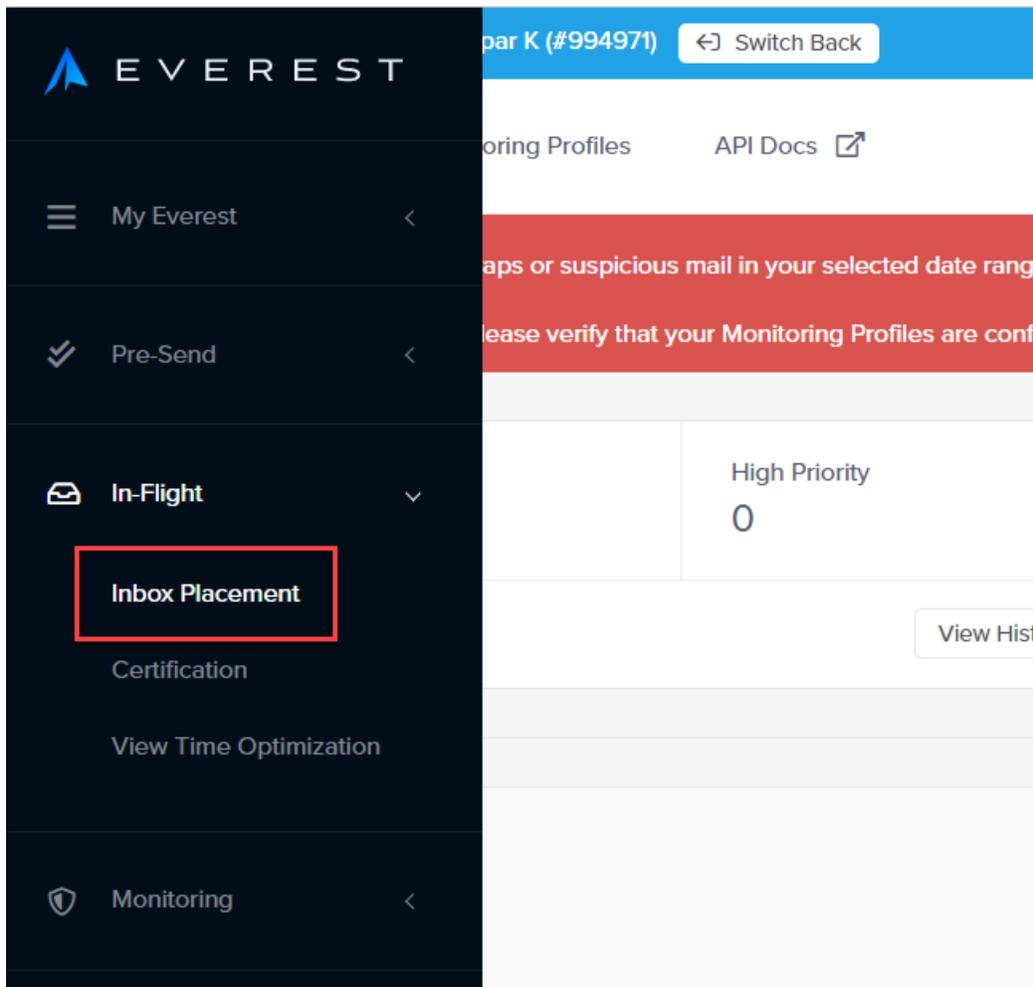
And create a monitoring profile



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

⚠ You are logged in to K par K (#994971) [↩ Switch Back](#)

Overview Inbox Tests Mailbox Provider Health **Manage Seed List**

Welcome to Everest. Please choose which regions to include in your seed list testing. Once you're finished,

Region Selection

Business to Consumer (B2C)

- Global
- North America
- South America
- Europe
- Asia
- Oceania

Business to Business (B2B)

- Hosting Companies
- Filter Companies

SmartSeeds

Include SmartSeeds (Coming Soon)

Seed List Optimizer: Optimized

Seed Weighting: Disabled

Download Seed List

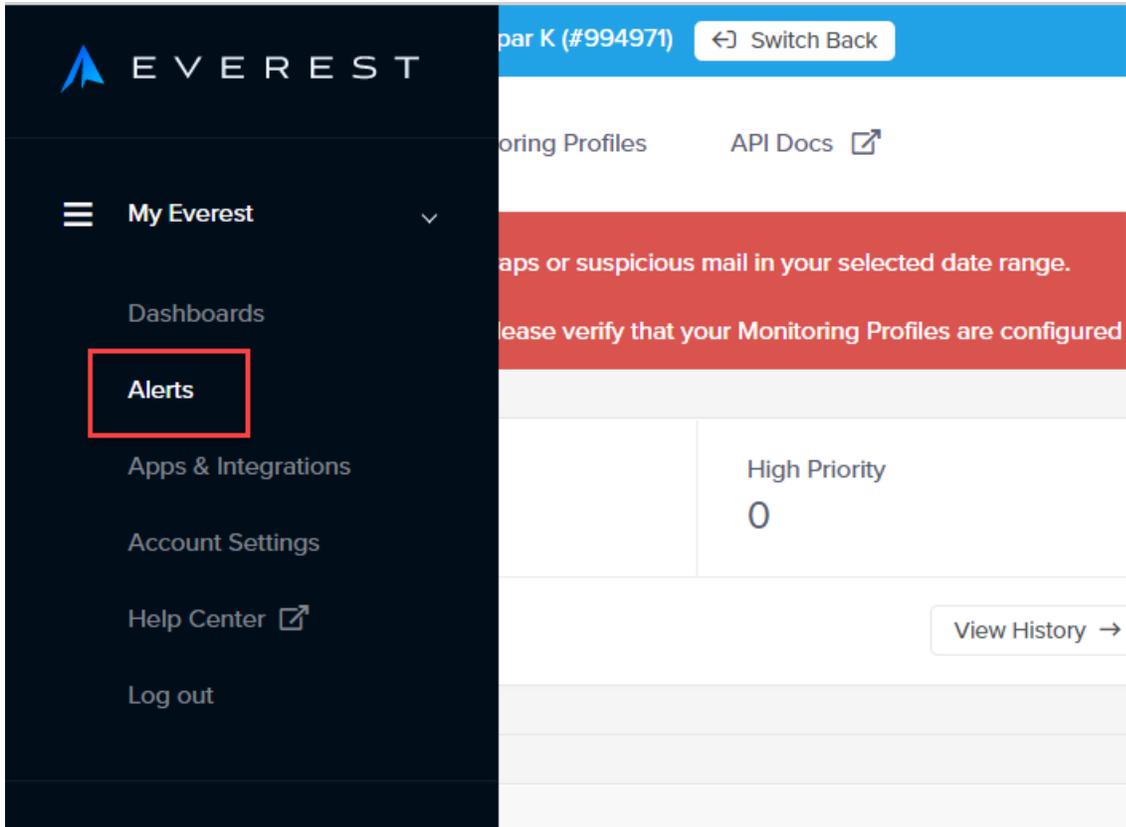
By sending Inbox tests to reference a... data for merge fields. Please do not s... associate customer data to CoreSeed

a-446-994971@seed.250ok.net
b-610-994971@seed.250ok.net
y-483-994971@seed.250ok.net
z-833-994971@seed.250ok.net

Please make sure you're sending tes

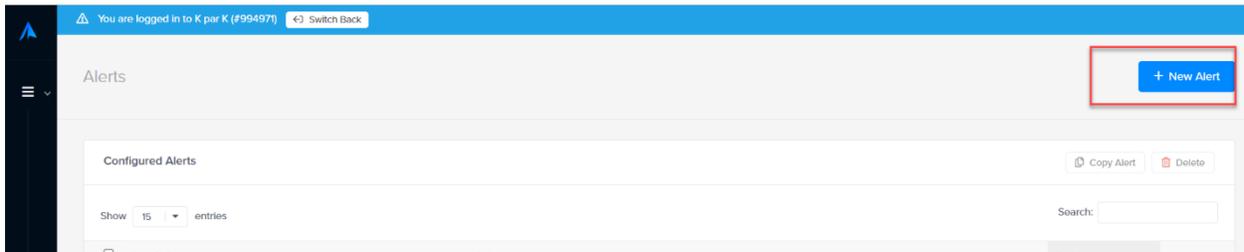
1	a-446-994971@seed.250ok.n
2	b-610-994971@seed.250ok.n
3	y-483-994971@seed.250ok.n
4	z-833-994971@seed.250ok.n

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"

New Alert

Description

Category

If my...

Notify me via Email
Comma-separated email addresses

Text Message
 Webhook
 Slack
 PagerDuty
 Microsoft Teams

Run this alert

✓ Save Alert

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 provision for Everest)

The screenshot shows the Salesforce interface for a Provisioning Queue. The URL is <https://validity.lightning.force.com/lightning/r/ProvisioningQueue/a8e4v000000wn93AAA/view>. The page title is "Provision K Par K - Everest Professional - (<3M)". Below the title, there are fields for "Opportunity Type" (Cross-Sell), "Provision System" (Everest), "Provision Date", and "De-Provision Date". The "Details" tab is active, showing the following information:

Provision Name	K Par K - Everest Professional - (<3M)	Owner	Provisioning Queue
Account	K Par K	Currency	USD - U.S. Dollar
Parent Account		Opportunity	Everest Pro early move K Par K Expansion 2021-05-28

You need the Everest account ID

The screenshot shows the "Account Manager" interface. It displays a list of accounts with the following columns: ID, Company, Type, Parent Account, and Package. The "ID" column is highlighted with a red box, and the value "994971" is visible in the first row. The search bar contains "k par k".

ID	Company	Type	Parent Account	Package
994971	K par K	Parent		Professional

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

Provision
K Par K - Everest Professional - (<3M)

Everest

SFMC Customer ID
This field is calculated upon save

Product Provision Type
Everest
This field is calculated upon save

Contract Start Date
10/05/2021
This field is calculated upon save

Bond ID Status ⓘ
 --None--

External ID
 994971

Negotiated DPA

This field is calculated upon save

Contact Phone
 +33171510927
This field is calculated upon save

Contract Status
Active
This field is calculated upon save

Contract End Date
09/05/2022
This field is calculated upon save

Exception End Date

Exception Notes

Status
To Be Done
This field is calculated upon save

Provision Date

Cancel Save

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

Provision
K Par K - Everest Professional - (<3M)

External ID
 994971

Negotiated DPA

This field is calculated upon save

Status
To Be Done
This field is calculated upon save

Provision Date
 10/05/2021

Signup URL ⓘ

Created By
 Kayla Chewning, 28/04/2021 15:56

Opportunity Type
 Cross Sell

Last Modified By
 Kayla Chewning, 28/04/2021 15:56

Record Type
 RP Record Type

Provision Date/Time
 Date: 10/05/2021 Time: 12:00

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



Provision

K Par K - Everest Professional - (<3M)

Sales Discovery Details

Prospecting IPs ⓘ

ESP ⓘ

Brands/Domains

Types of Mail Sent ⓘ

Signup URL ⓘ

Onboarding Point of Contact

Business Description ⓘ

Email Program Goals and Priorities ⓘ

Expectations from RP

Created By

Kayla Chewning, 28/04/2021 15:56

Cancel

Save

Created By

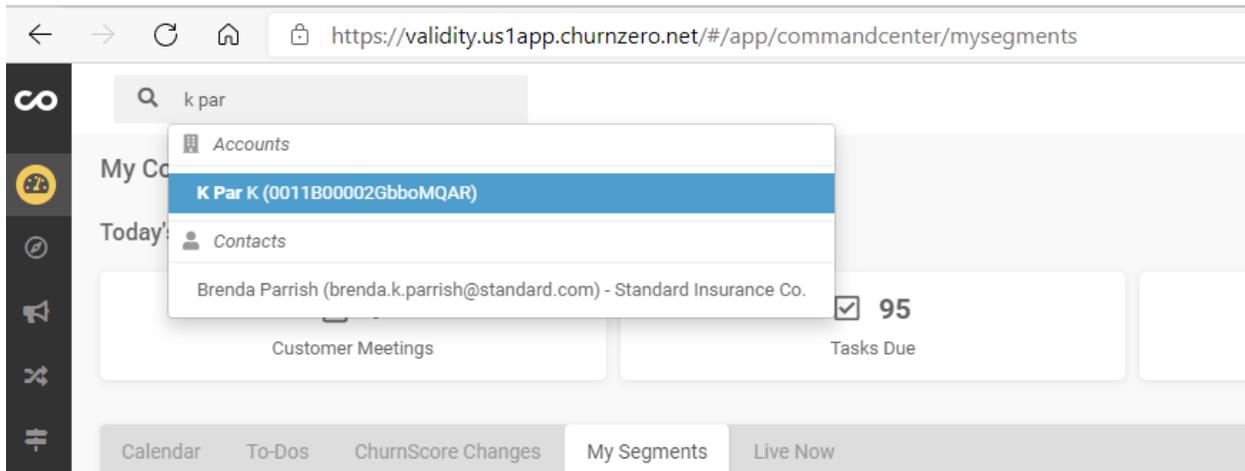
Kayla Chewning, 28/04/2021 15:56

And Click Save

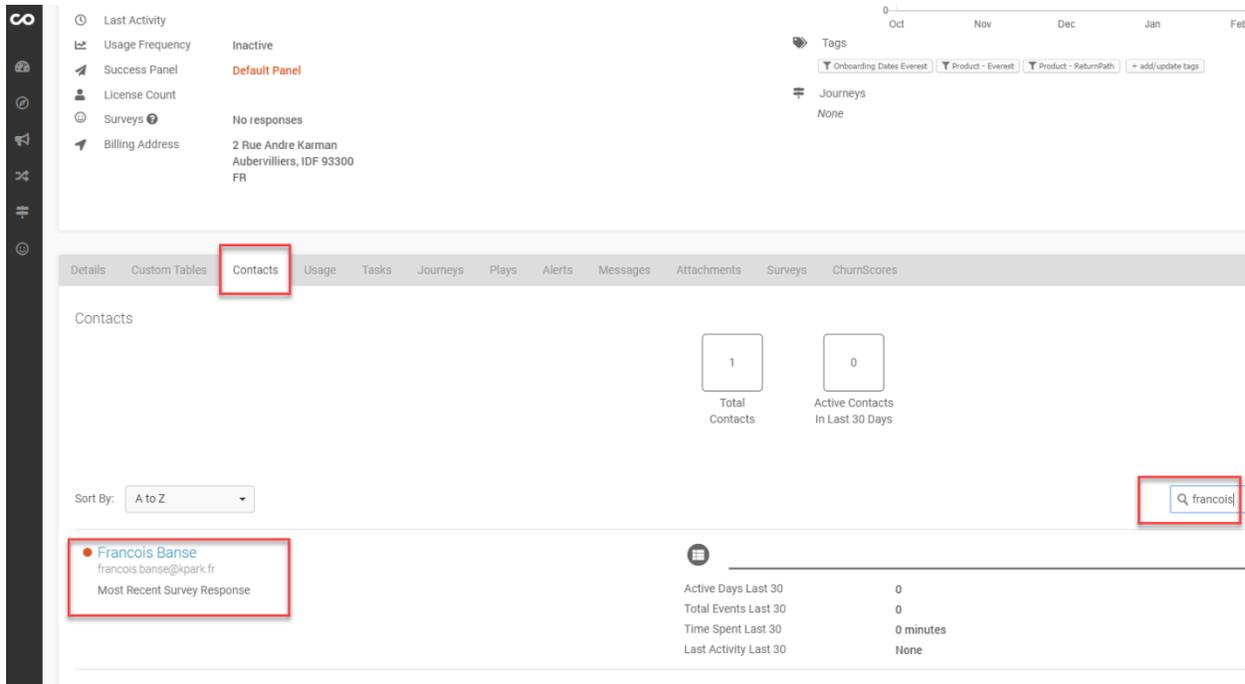
VII) ChurnZero Journey

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”

← → ↻ 🏠 🔒 https://validity.us1app.churnzero.net/#/app/contact/406326/

8

Contact Details ✎

Mailing Street	2 Rue Andre Karman
Mailing City	Aubervilliers
Mailing State/Province	IDF
Mailing Country	FR
Primary Contact	True
Bad Email	False
Email Opt Out	False
BriteVerify Status	Accept_All
NPS Last Rating	
NPS Last Comment	
Last Activity	5/3/2021
Customer Reward	

Contact Groups ▾

On-Boarding Contact	True
CSM Contact	False

Team Members

Olivier Pajot	Owner
EMEA Sales Director	Account Executive
Alessandro Polidoro	Customer Account Executive
Philippa Ford	Onboarding
Ashley Ghearing	Operations 1
John Pollard	Operations 2

If false change to true by using the pencil.

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

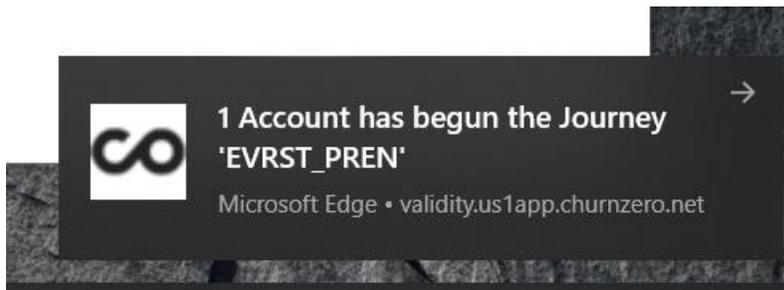
The screenshot shows the ChurnZero interface for account 'K Par K'. On the left, there's a sidebar with navigation icons. The main area displays account details: Owner (Olivier Pajot), Status (Active), Start Date (GMT Standard Time), Next Renewal Date (9/15/2021 5:00 AM GMT Standard Time (128 Days)), Total Contract Amount (\$2,879.68), Last Activity, Usage Frequency (Inactive), Success Panel (Default Panel), License Count, Surveys (No responses), and Billing Address (2 Rue Andre Karman, Aubervilliers, IDF 93300). To the right, there's a ChurnScore chart showing a score of 60 from Oct to May. Below the chart are tags and a 'Journeys' section. A 'Quick Actions' menu is open on the right, with 'Manage Journey' highlighted in red.

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

The 'Manage Journey' dialog box is shown. It has a title bar with a close button (X). Below the title bar, it says 'For 1 Account'. There are two dropdown menus: 'Action' set to 'Begin Journey' and 'Journey' set to 'EVRST_PREN'. At the bottom, there are two buttons: 'Cancel' and 'Begin Journey'.

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

Next Renewal Date 9/15/2021 5:00 AM GMT Standard Time (128 Days)

Total Contract Amount \$2,879.68

Last Activity

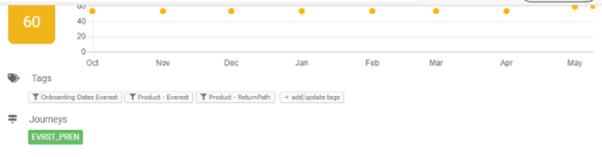
Usage Frequency Inactive

Success Panel **Default Panel**

License Count

Surveys No responses

Billing Address 2 Rue Andre Karman
Aubervilliers, IDF 93300
FR



- Details
- Custom Tables
- Contacts
- Usage
- Tasks
- Journeys**
- Plays
- Alerts
- Messages
- Attachments
- Surveys
- ChurnScores

Journey: EVRST_PREM is **On Track** Update Journey

5/10/2021	1 (1.7%)	59
Date Started	Days In	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.

The screenshot shows the ChurnZero Milestone dashboard for account 15546. At the top, it displays progress: Done Milestones: 0 (0.0%), In Progress Milestones: 1 (50.0%), and To Do Milestones: 1 (50.0%). Below this is a progress bar. The main section is titled "In Progress Milestones" and shows a milestone named "Provisioning & Technical Implementation" with a status of "On Track" and a "Complete This Milestone" button. The milestone started on 5/10/2021 and has 1 day in and 54 days left. Below the milestone details are two sections: "Achievements" and "Tasks". The "Achievements" section shows 0 done out of 10 to do. The "Tasks" section shows 2 done out of 8 to do. The tasks include: Provision Customer Account (completed), Update Provision Object (completed), Welcome Email and Onboarding Guide, Send Invitation To Group Training, Ensure Seed List Setup, Ensure Header Matching, Ensure Reputation Profile Setup, Ensure Design Render Test, and two optional Send Everest - Unresponsive - Reminder tasks.

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

The screenshot shows the ChurnZero account page for "K Park". The account is active and has a ChurnScore of 60. The page displays account details such as owner (Olivier Pajot), status (Active), start date (9/15/2021), and total contract amount (\$2,879.68). A "Quick Actions" menu is open, showing options like "Create Task", "Log Activity", "Compose", "Run Account Play", and "Manage Journey". The "Run Account Play" option is highlighted with a red box.

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

Run Play



For: 1 Account

Play

EVRTS_PREN Welcome & Technical Implementation

Begin with
Step

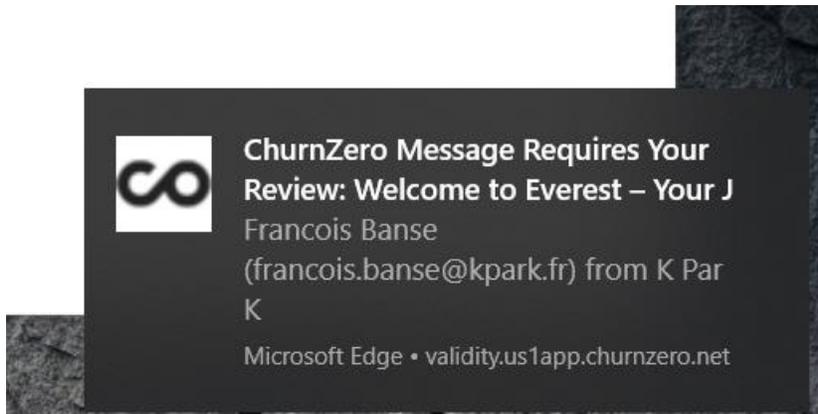
Step 1: Welcome to Everest – Your Journey Begins!

Cancel

Run Play

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

Search Accounts, Contacts, Segments

K Par K 

0011B00002Gbb0MQAR

Owner: Olivier Pajot

Status: Active

Start Date: GMT Standard Time

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

ChurnScore: 60

Tags: Onboarding Dates Everest, Product - Everest, Product

Journeys: EVRST_PREN

Details Custom Tables Contacts Usage **Tasks** Journeys Plays Alerts Messages Attachments Surveys ChurnScores

Open Tasks

And scroll down to the message review section

https://validity.us1app.churnzero.net/#/app/account/15546/tasks

Review/Send "Onboarding Complete" email: If account has a CSM, make sure to include CSM name in the email. If no CSM, send to Help Center/support.

Confirm CSM Assignment

Confirm that CSM has been assigned to the account and is showing on the Account Team in ChurnZero. (if applicable)
**This needs to be complete prior to sending the "Offboarding Complete" email.

Matching ID

Send "Follow Up to Welcome" Email

Review/send "Follow up to welcome" email that was generated when Milestone 1 completed.
**Attach Core Seed list to email.

Update Provision Object

Add onboarding information collected via web form to the provision object in Salesforce. To access the provision object, locate the record in ChurnZero - click Custom Tables - Locate Provisions. Click the cloud next to the p

Set Up Customer Account

- Once customer returns onboarding form, please set up customer account.

Welcome Emails

- Review/Send welcome email template generated from play.
- Check provisioning record to verify what information has been provided and what information is needed.

First < 1 of 2 > Last

Message Review

	Date ▲	Play	Contact	Message
<input type="checkbox"/>	5/10/2021 12:52 PM	EVRTS_PREN Welcome & Technical Implementation	Francois Banse	Send Email: Welcome to Everest – Your Journey Begins!
<input type="checkbox"/>	5/10/2021 12:59 PM	EVRTS_PREN Welcome & Technical Implementation	Francois Banse	Send Email: Welcome to Everest – Your Journey Begins!

Click on the pencil for the welcome play

Message Review Bulk Actions ▾

Date ▲	Play	Contact	Message	Reviewer	
<input type="checkbox"/> 5/10/2021 12:52 PM	EVRTS_PREN Welcome & Technical Implementation	Francois Banse	Send Email. Welcome to Everest - Your Journey Begins!	Philippa Ford	
<input type="checkbox"/> 5/10/2021 12:59 PM	EVRTS_PREN Welcome & Technical Implementation	Francois Banse	Send Email. Welcome to Everest - Your Journey Begins!	Philippa Ford	

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



Once you are happy click on Approve & Send

The image shows a screenshot of an email editor interface. The top part displays a preview of an email with two blue buttons: "Guide d'Intégration" and "Formation". The email body contains the following text:

Votre compte Everest a été provisionné et vous devriez avoir reçu un e-mail séparé contenant vos informations de connexion pour pouvoir commencer immédiatement.

Cordialement,

Philippa Ford

Below the text is the Everest logo, followed by the address "200 Clarendon St, 22nd Floor, Boston, MA 02116" and the copyright notice "© 2020 Validity. All Rights Reserved | [Privacy Policy](#)". At the bottom of the preview are social media icons for LinkedIn, Twitter, YouTube, Instagram, and Facebook.

The bottom part of the screenshot shows the email editor's control panel. It includes a "Send Test Email..." button, an "Edit Message" button, and a row of action buttons: "Reject", "Reject and Force Exit", "Cancel", and "Approve and Send". The "Approve and Send" button is highlighted with a red rectangular border.

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	Days In	1 (1.8%)
Started On	5/10/2021	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 \(sharepoint.com\)](https://sharepoint.com)

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

SharePoint

Search this list

CN CSS North America Private group

+ New Edit Edit in grid view Share Copy link

Onboarding Queue ☆ > Philippa Ford

Company Name	Onboarding Co..
SegurCaixa ADESLAS	No
Cross Country Healthcare	No
DataDelivers	No
JP Morgan UK	No
Cellaire SA	No
Edenred France	No
Women's Best GMBH	No
<input checked="" type="checkbox"/> K Par K	No
Gie Les Cinémas Pathé Gaumont Cartes De Fidélité	No

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

Save Cancel Copy link

5/10/2021 1:00 AM

This is the designated date for beginning onboarding with the customer.

Started Onboarding

Yes

Started Onboarding means that they have been added to CZ, a CSS has been assigned and the Journey has started.

Estimated Onboarding End

5/10/2021 1:00 AM

Case Number *

<https://validity.lightning.force.com/lightning/r/Opportunity/00...>

<https://validity.lightning.force.com/lightning/r/Opportunity/00...>

Hyperlink to case URL

calc_weekOfYear

19

weekNumber

Enter a number

Do not use this field

Attachments

[Add attachments](#)

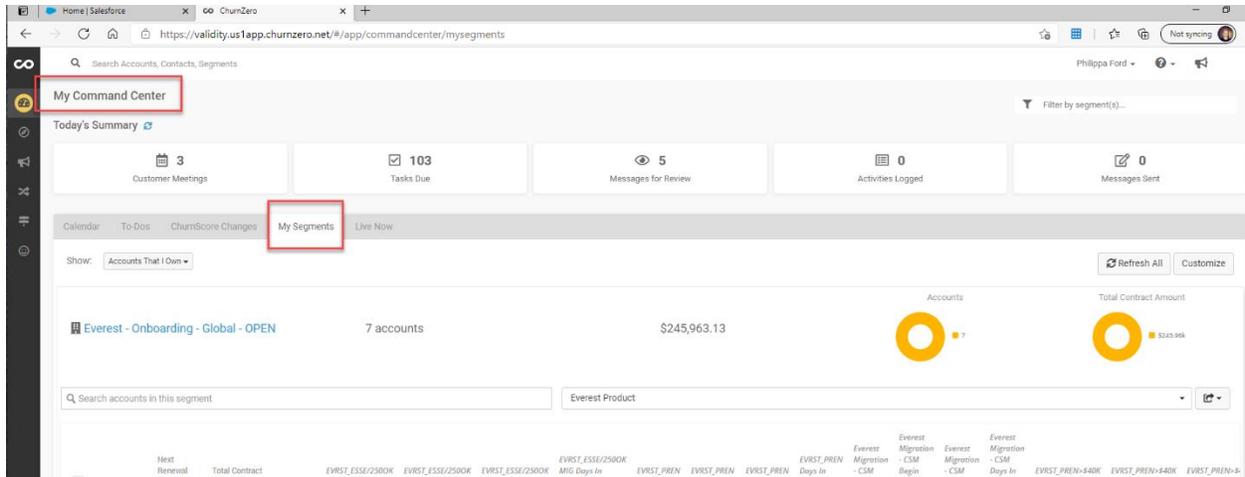
Save Cancel

Click Save.

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

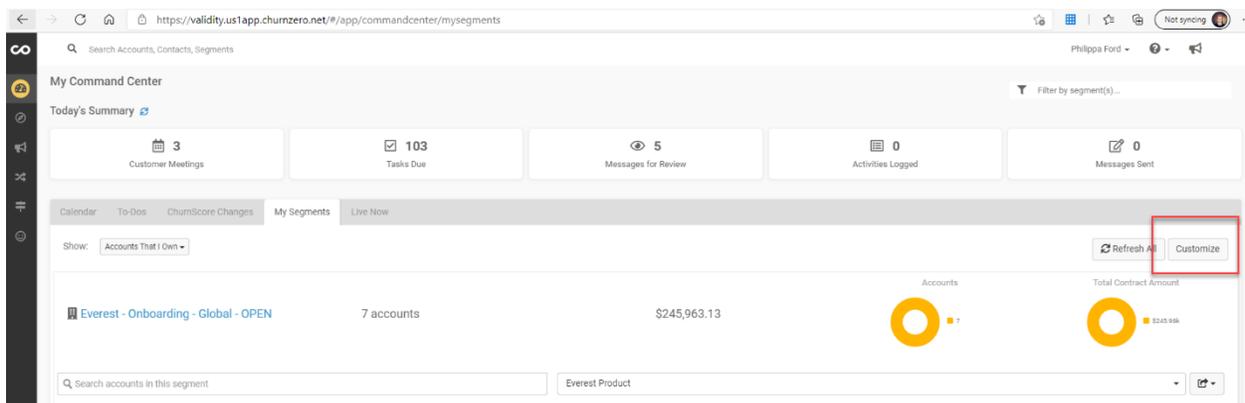
X) Keeping on top of your clients

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:



The screenshot shows the ChurnZero My Command Center interface. The 'My Segments' tab is selected and highlighted with a red box. The interface displays a 'Today's Summary' section with five cards: Customer Meetings (3), Tasks Due (103), Messages for Review (5), Activities Logged (0), and Messages Sent (0). Below this is a navigation bar with 'My Segments' highlighted. The main content area shows a segment named 'Everest - Onboarding - Global - OPEN' with 7 accounts and a total contract amount of \$245,963.13. There are two donut charts: one for 'Accounts' (7) and one for 'Total Contract Amount' (\$245,963.13). A search bar is present for accounts in this segment, and a 'Customize' button is highlighted with a red box.

To add these segments click on Customize



This screenshot is identical to the previous one, but the 'Customize' button in the top right corner of the segment card area is highlighted with a red box.

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

Select Segments ✕

Available

clear

Accounts

- [LE] DNU - Everest - Onboarding - Enterprise 100K - Behind - Completed (Private)
- [LE] DNU - Everest - Onboarding - Enterprise 100K - Behind - In-Progress (Private)
- [LE] DNU - Everest - Onboarding - Enterprise 100K - On-Track - Completed (Private)
- [LE] DNU - Everest - Onboarding - Enterprise 100K - Stuck - Completed (Private)
- [LE] DNU - Everest - Onboarding - Enterprise 100K - Stuck - In-Progress (Private)
- [LE] DNU - Everest - Onboarding - Enterprise 100K - On-Track - In-Progress (Private)
- [LE] DNU - Everest - Onboarding - Professional & Enterprise - Behind - Completed (Private)
- [LE] DNU - Everest - Onboarding - Professional & Enterprise - Behind - In-Progress (Private)

Selected

- Everest - Onboarding - Global - OPEN (Global)
- VDM-BV-GB-DT Clients Onboarding Global Open (Global)

Cancel
OK

Then click OK.

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

My Command Center Filter by segment(s)...

Today's Summary ↗

3

Customer Meetings

103

Tasks Due

4

Messages for Review

0

Activities Logged

0

Messages Sent

Calendar To-Do's ChurnScore Changes My Segments Live Now

Show: Accounts That I Own Refresh All Customize

Segment	Accounts	Total Contract Amount	Accounts	Total Contract Amount
Everest - Onboarding - Global - OPEN	7 accounts	\$245,963.13		\$245,963
VDM-BV-GB-DT Clients Onboarding Global Open	3 accounts	\$22,410.18		\$22,410

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

Hide details

Search accounts in this segment Everest Product

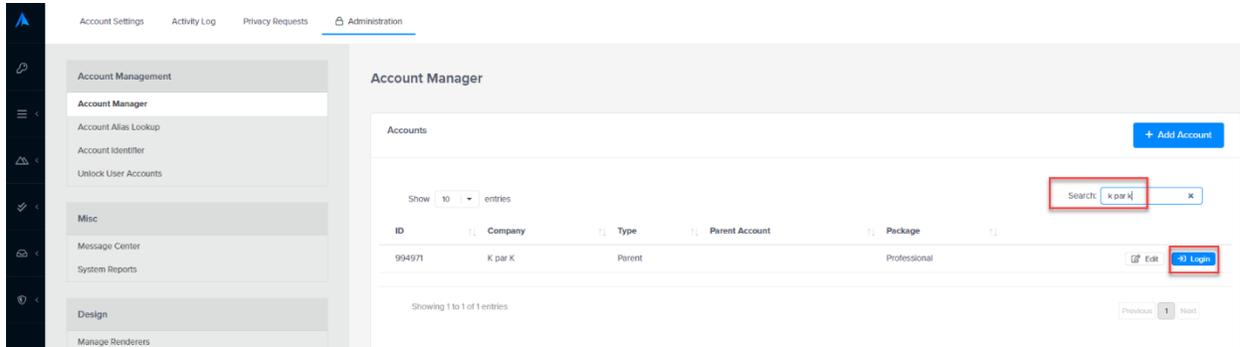
Name	Next Renewal Date	Total Contract Amount	Onboarding	EVST_ESSE/2500K MIG Status	EVST_ESSE/2500K MIG Begin Date	EVST_ESSE/2500K MIG End Date	EVST_ESSE/2500K MIG Days In Journey	EVST_PREN Status	EVST_PREN Begin Date	EVST_PREN End Date	EVST_PREN Days In Journey	Everest Migration - CSM Status	Everest Migration - CSM Begin Date	Everest Migration - CSM End Date	EVST_PREN-540K Status	EVST_PREN-540K Begin Date	EVST_PREN-540K End Date
<input type="checkbox"/> Cellaire SA	4/30/2022	\$4,892.54	Philippa Ford					In Progress - On Track	4/29/2021		13						
<input type="checkbox"/> DataDelivers, LLC	4/11/2022	\$13,000.00	Philippa Ford					In Progress - On Track	4/14/2021		28						
<input type="checkbox"/> Edenred France, S.A.S	5/2/2022	\$24,844.92	Philippa Ford					In Progress - On Track	5/4/2021		8						
<input type="checkbox"/> JP Morgan UK	3/31/2022	\$144,996.00	Philippa Ford												In Progress - On Track	4/20/2021	
<input type="checkbox"/> K.Par K	9/15/2021	\$2,879.68	Philippa Ford					In Progress - On Track	5/10/2021		2						
<input type="checkbox"/> SegurCaixa ADESLAS	3/28/2022	\$12,000.00	Philippa Ford					In Progress - On Track	3/29/2021		44						
<input type="checkbox"/> 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

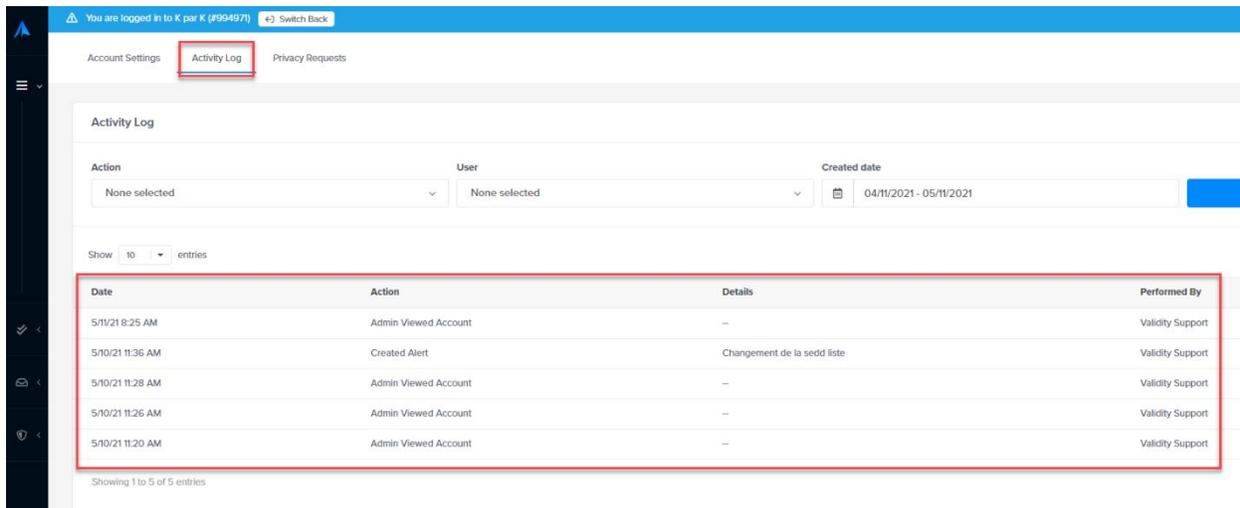
Login to Everest

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

The screenshot shows a web application interface for account management. At the top, there's a navigation bar with a 'Messages' tab highlighted. Below the navigation bar, there are three summary cards: 'Emails Received' (3), 'Emails Sent' (10), and 'Announcements Posted' (0). Below these cards is a table of messages. The table has columns for Message Name, Origin, From, To, CC, BCC, Date Sent, and Engagement. A red box highlights the Engagement column in the table.

Message Name	Origin	From	To	CC	BCC	Date Sent	Engagement
Bienvenue à Everest! Votre voyage commence !	Document	Play	Philippa Ford	Francois Banse	Olivier Pajot	Philippa Ford	5/10/2021 1:04 PM

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)
- Configurez 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

The screenshot shows the ChurnZero account management interface for 'Women's Best GmbH'. The account ID is 0011B000029G51NMQA1. The owner is Alessandro Polidoro, and the status is Active. The start date is GMT Standard Time, and the next renewal date is 4/30/2022 5:00 AM GMT Standard Time (353 Days). The total contract amount is \$43,349.99, and the last activity was on 5/10/2021 4:00 PM. A ChurnScore of 40 is displayed, along with a line graph showing the score over time from June to April. A 'Quick Actions' menu is open, with 'Run Account Play' highlighted.

Run Play

For: 1 Account

Play: EVRTS_PREN>\$40K Welcome Email

Begin with Step: Step 1: Welcome to Everest – Your Journey Begins!

Cancel

Run 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:

[EXTERNAL] Your Everest Journey - Kick Off Call

Validity <sales.ops@validity.com> on behalf of Validity <sales@validity.com>
Required: Philippa Ford; Sebastian Kull

Accept ? Tentative

We couldn't find this meeting in the calendar. It may have been moved or deleted.

invite.ics
2 KB

12 May 2021 14:00-14:45 Zoom

14:00	[EXTERNAL] Your Everest Journey - Kick Off Call Zoom; Validity
15:00	

from the Internet.
Validity

Your meeting has been confirmed as follows:

Subject:
Your Everest Journey - Kick Off Call

Date and Time:
Wednesday, May 12, 2021 02:00 PM BST
[Click to view, reschedule, or cancel](#)

Internal Attendees:
Philippa Ford (organizer) - philippa.ford@validity.com

Client Attendees:
Sebastian Kull (primary) - sebastian.kull@womensbest.com

Organizer Notes:
Hi
Please schedule some time in with me.

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:

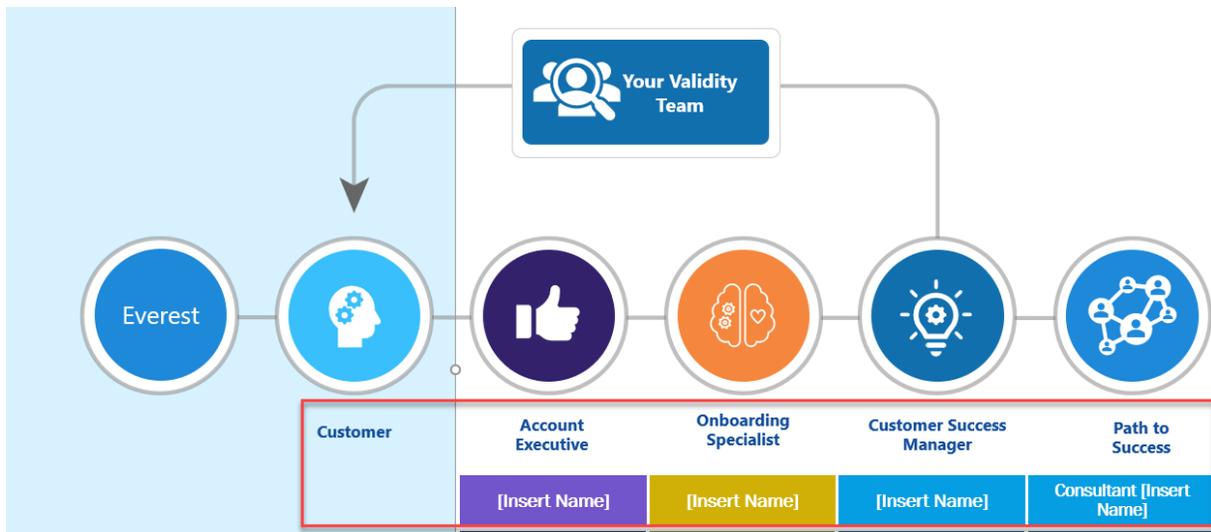
[Group-Global Onboarding -> Documents -> Email Solutions -> Kick off call resources](#)

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:

Opportunity
Renewal - 00017250 - 4/30/2021 + Follow

Account Name Women's Best GmbH	Close Date 30/04/2021	Amount EUR 36,000.00 (GBP 31,032.59)	Opportunity Owner Alessandro Polidoro	Stage Closed Won
---	--------------------------	---	--	---------------------

Progress bar: [✓] [✓] [✓] [✓] [✓]

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

Account
Women's Best GmbH + Add

00016705	Activated	01/05/2021
00008451	Activated	01/05/2020

[View All](#)

Advocacy (0)

Account Team (2)

Giuseppe Capuano Team Role: CSM - RP	Phillippa Ford Team Role: Onboarding
---	---

[View All](#)

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.

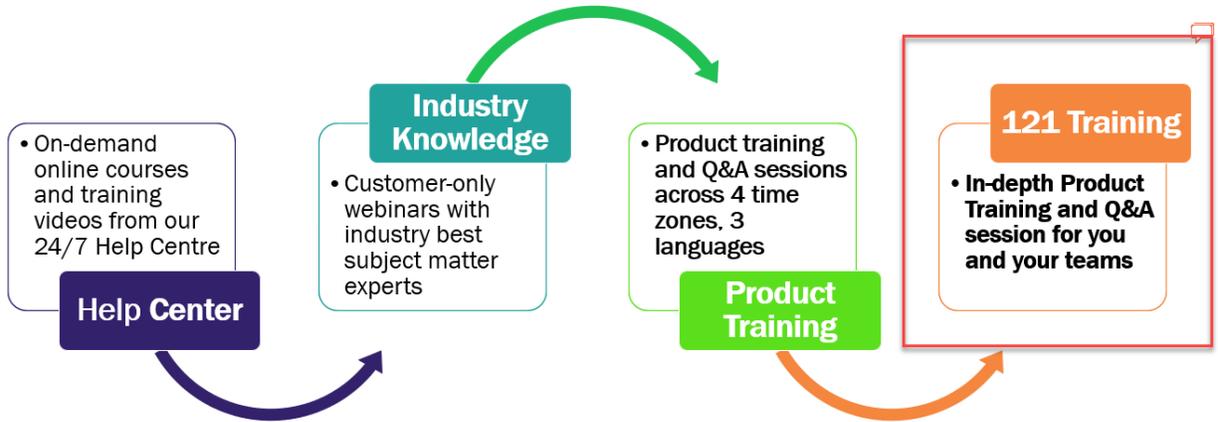
Discovery

Company and Onboarding Contact	Email Related Information	Contract Related Information
Organization: Women's Best GmbH	Email Service Provider (ESP): Emarsys	Everest Package: Enterprise
Full Name: Sebastian Kull	Types of Email Sent: Transactional / Marketing	Contract Start Date: 01/05/2021
Email Address: sebastian.kull@womensbest.com	[dedicated/shared] IPs: 45.86.117.3 45.86.117.4	Guided Experience [yes/no]: No
	List of Sending Domains: email.womensbest.com	

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 (250k or ReturnPath).

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

Everest Onboarding | Training Resources



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:

The screenshot shows a Salesforce Opportunity record for 'Everest Pro early move | K Par K | Expansion | 2021-05-28'. The record is owned by Olivier Pajot and is in the 'Closed Won' stage. A Chatter post is visible, where the user asks for help identifying the correct onboarding contact for client K Par K. The post text is: 'Hi @Olivier Pajot I am onboarding your 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'. The 'Post' button and the 'Share' button are highlighted with red boxes.

Account Name	Close Date	Amount	Opportunity Owner	Stage
K Par K	28/04/2021	EUR 11,500.00 (GBP 9,913.19)	Olivier Pajot	Closed Won

Details Activity **Chatter**

Post Poll

Hi @Olivier Pajot I am onboarding your 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

To: Validity Only ▼

Share

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



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.

The screenshot displays the ChurnZero Command Center interface. At the top, there's a search bar and a user profile for 'Philippa Ford'. Below this, a 'Today's Summary' section shows key metrics: 7 Customer Meetings, 116 Tasks Due, 7 Messages for Review, 8 Activities Logged, and 6 Messages Sent. The main area is titled 'My Segments' and shows the 'Everest - Onboarding - Global - OPEN' segment with 7 accounts and a total contract amount of \$267,963.13. A table lists the accounts with columns for Name, Next Renewal Date, Total Contract Amount, Onboarding, and various migration status columns. The table includes entries for Cellaire SA, Charter Communications, Inc., DataDelivers, LLC, and Edenreed France.

Name	Next Renewal Date	Total Contract Amount	Onboarding	EVST_ESSE/2500K MIG Status	EVST_ESSE/2500K MIG Begin Date	EVST_ESSE/2500K MIG End Date	EVST_ESSE/2500K MIG Days In Journey	EVST_PREN Status	EVST_PREN Begin Date	EVST_PREN End Date	EVST_PREN Days In Journey	Everest Migration - CSM Status	Everest Migration - CSM Begin Date	Everest Migration - CSM End Date	Everest Migration - CSM Days In Journey	EVST_PREN-640K Status	EVST_PREN-640K Begin Date	EVST_PREN-640K End Date
Cellaire SA	4/30/2022	\$4,892.54	Philippa Ford					In Progress - On Track	4/29/2021		19							
Charter Communications, Inc.	5/14/2022	\$22,500.00	Philippa Ford					In Progress - On Track	5/14/2021		4							
DataDelivers, LLC	4/11/2022	\$13,000.00	Philippa Ford					In Progress - On Track	4/14/2021		34							
Edenreed France.	5/2/2022	\$24,844.92	Philippa Ford					In	5/4/2021		14							

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 definitely 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:

Customer Success Info 	
Customer Health Score	
Last Updated Date – Customer Health	
Onboarding Notes	01/02/2021 Unresponsive Client, tried reaching out many times but no answer. They have been logging into Everest and have attended training. I also sent them a record of a training session. Offboarded on day 45.
Onboarding Journey On-Hold Reasons	Unresponsive Client
Entered Whale Program Date	

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)

Details Custom Tables Contacts Usage Tasks Journeys Plays Alerts Messages Attachments Surveys ChurnScores

Journey EVRST_PREN is On Track

4/14/2021
Date Started

36
(60.0%)
Days In

24
Days Left

Update Journey ▾

- Complete this Journey
- Complete this Journey + Open Steps
- Fail this Journey
- Force Exit from Journey

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)

Provisioning & Technical Implementation

Status	Completed	Started On	2/12/2021
Days To Complete	5	Completed On	2/16/2021

Achievements
Done: 7 (70.0%) | To Do: 3 (30.0%)

- Implement-Seed-List** *
Achieved on 2/16/2021 by Philippa Ford
- Implement-Header-Matching** *
Achieved on 2/16/2021 by Philippa Ford
- Setup-Reputation-Profile** *
Achieved on 2/15/2021 by Philippa Ford
- Design-Renders** *
Achieved on 2/16/2021 by Philippa Ford
- Infrastructure**
Achieved on 2/16/2021 by Philippa Ford
- List-Validation**
Achieved on 2/16/2021 by Philippa Ford
- Implement-Tracking-Pixel**
Achieved on 2/16/2021 by Philippa Ford
- ESP Integration**
- API Setup**
- Attend Training**

Tasks
Done: 7 (70.0%) | To Do: 3 (30.0%)

- Provision-Customer-Account** *
Completed on 2/12/2021 by Philippa Ford
- Update-Provision-Object** *
Completed on 2/12/2021 by Philippa Ford
- Welcome-Email-and-Onboarding-Guide** *
Completed on 2/12/2021 by Philippa Ford
- Send Invitation To Group Training** *
Task added after Milestone Complete
- Ensure-Seed-List-Setup** *
Completed on 2/16/2021 by Philippa Ford
- Ensure-Header-Matching** *
Completed on 2/16/2021 by Philippa Ford
- Ensure-Reputation-Profile-Setup** *
Completed on 2/15/2021 by Philippa Ford
- Ensure-Design-Render-Test** *
Completed on 2/16/2021 by Philippa Ford
- Optional - Send Everest - Unresponsive - Reminder 1**
Task added after Milestone Complete
- Optional - Send Everest - Unresponsive - Reminder 2**
Task added after Milestone Complete

Done Milestones: 0 (0.0%) | In Progress Milestones: 1 (50.0%) | To Do Milestones: 1 (50.0%)

In Progress Milestones

Provisioning & Technical Implementation

Status	On Track	Days In	21 (38.2%)
Started On	4/29/2021	Days Left	34

[Complete this Milestone](#)

Then you will start the offboarding milestone

Offboarding

Milestone begins when the milestone "Provisioning & Technical Impl

Status	Not Started	Days Left	5
--------	-------------	-----------	---

Achievements
Done: 0 (0.0%) | To Do: 0 (0.0%)

No achievements

[+ Add Custom Achievement](#)

Tasks
Done: 0 (0.0%) | To Do: 2 (100.0%)

- Confirm Path to Support and Service** *
- Send Onboarding Completed Email** *

[+ Add Custom Task](#)

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:

Account
JP Morgan UK

Orders (1)

Order Number	Status	Order Start Date	Contract Number
00016470	Activated	01/04/2021	

[View All](#)

Advocacy (0) New

Account Team (3) Add Team Members



Coralie Levi
Team Role: CSM - RP



Philippa Ford
Team Role: Onboarding



Sophie Jean
Team Role: Professional Services

[View All](#)

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.

Offboarding 📄

Status	Completed	Started On	3/23/2021 🔗
Days To Complete	1	Completed On	3/23/2021 🔗

🏆 Achievements Done: 0 (0.0%) To Do: 0 (0.0%) <div style="background-color: #ccc; width: 100%; height: 10px; margin-top: 5px;"></div> <p>No achievements</p>	✔ Tasks Done: 2 (100.0%) To Do: 0 (0.0%) <div style="background-color: #004a99; width: 100%; height: 10px; margin-top: 5px;"></div> <ul style="list-style-type: none"><input checked="" type="checkbox"/> Confirm Path to Support and Service ✖ Completed on 3/23/2021 by Philippa Ford 🔗<input checked="" type="checkbox"/> Send Onboarding Completed Email ✖ Completed on 3/23/2021 by Philippa Ford 🔗
---	--

Details Custom Tables Contacts Usage Tasks **Journeys** Plays Alerts Messages Attachments Surveys ChurnScores

Journey EVRS_T_PREN is On Track

4/14/2021
Date Started [🔗](#)

96
(60.0%)
Days In

24
Days Left

Update Journey ⌵

- Complete this Journey
- Complete this Journey + Open Steps
- Fall this Journey
- Force Exit from 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

SharePoint

CN CSS North America Private group

Home CS Site LATAM Training Shared with us Documents EVEREST-Customer pr... VFE-Customer provis... VDM-Customer provis... VSP-Customer provis... BriteVerify-Customer p... GridBuddy Cloud-Cust... Customer cancellations Cross-training Site

Onboarding Queue ☆ Philippa Ford

Company Name	Onboarding Co...	Account Level	Onboarding Type
<input checked="" type="checkbox"/> DataDelivers		Everest Professo...	Migration
J.P. Morgan UK		Everest Enterprise	New Customer
Celaire SA		Everest Professo...	New Customer
Eiderved France		Everest Professo...	New Customer
Women's Best GMBH		Everest Enterprise	Migration
K. Par K		Everest Professo...	Migration
Charter Communications Inc		Everest Professo...	Migration
Gie Les Cindras Rathé Gaumont Cartes De Fidélité		Everest Professo...	Migration

DataDelivers

Company Name * DataDelivers

Name of Validity's customer

 Onboarding Complete
 Yes

Please mark yes when onboarding has been completed.

Account Level Everest Professional

Select the account level from Everest

Onboarding Type Migration

Choose if migration or new customer

AE for account * Sarah Shuck Enter a name or email address

Assigned to Philippa Ford Enter a name or email address

This is the CSS assigned to this account

Onboarding Date

Comments

Add a comment

Be the first one to add a comment

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.