

# Customer Onboarding Experience

Omega & Green Project Technologies | Luke Baumann, CTO

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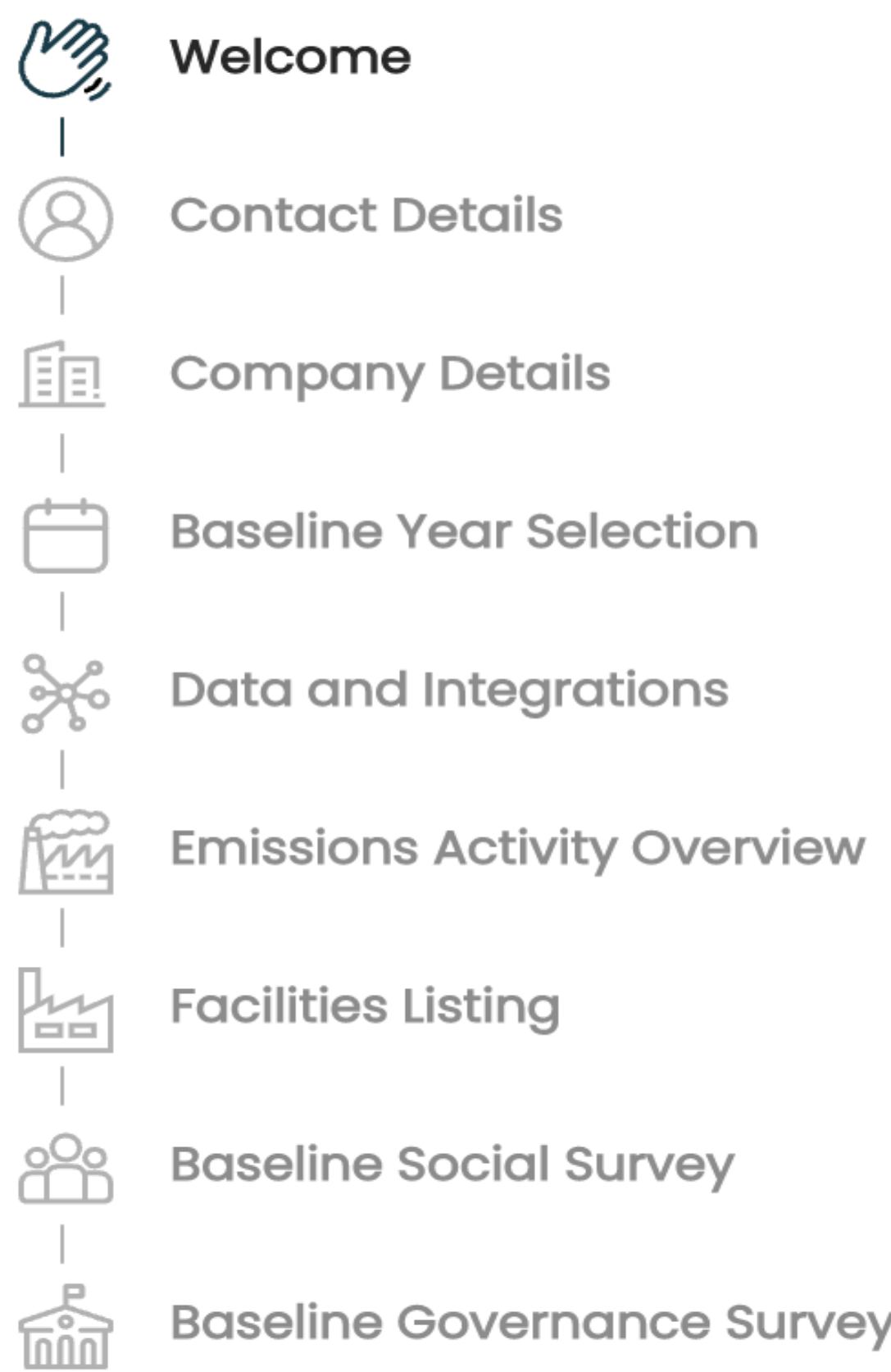
## Problem or opportunity addressed

Customers were not using the self-service onboarding portal and were instead reaching out to sales representatives for onboarding. Our goal was to improve the portal's usability and reduce the time required for the self-service onboarding workflow.



## Background

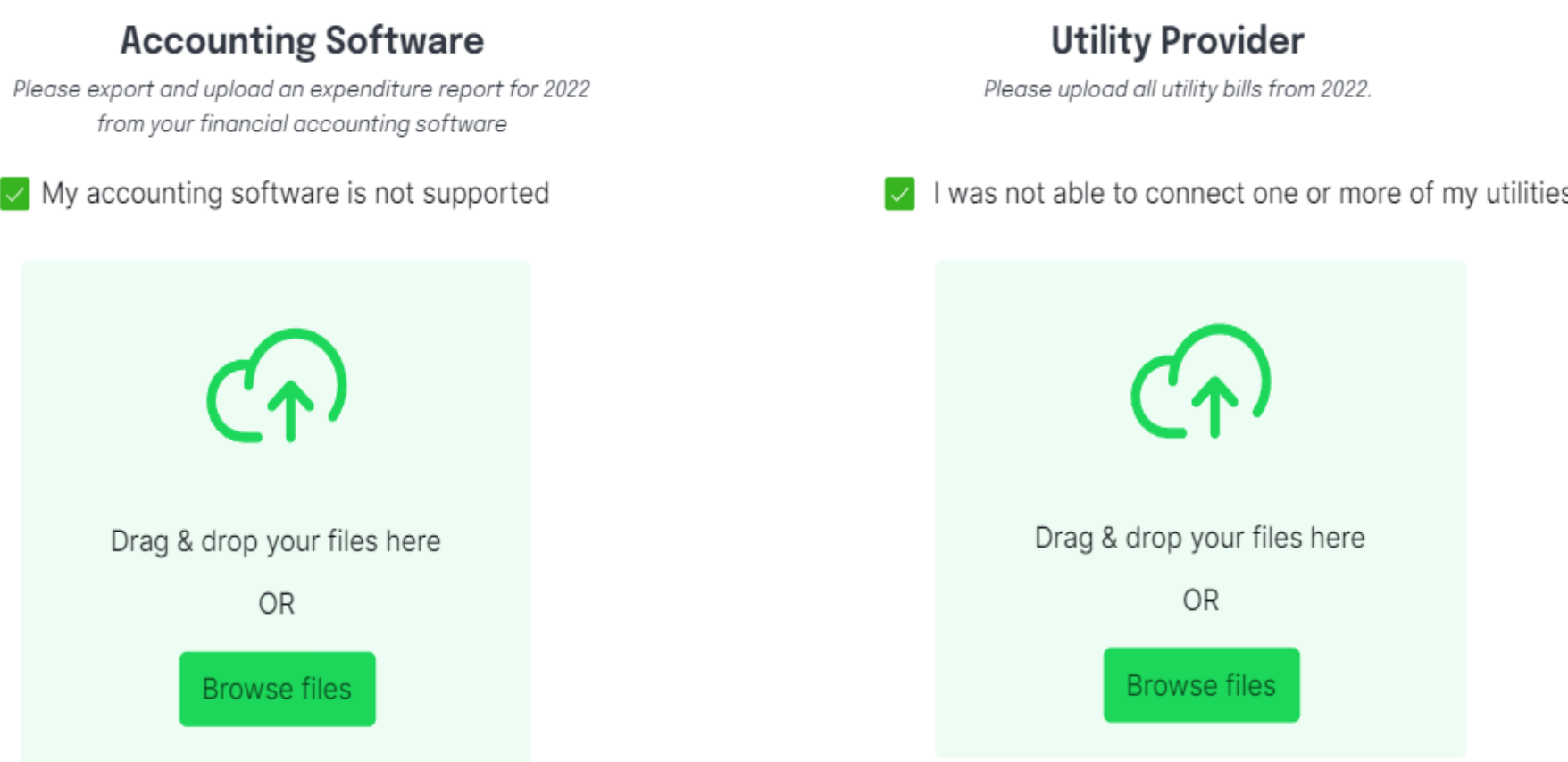
Green Project Technologies is the first API-integrated ESG platform that provides tracking and reporting ESG data through the provision of API connectors to organizations' internal systems, portfolio and supply chain management tools, and rapid customer onboarding.



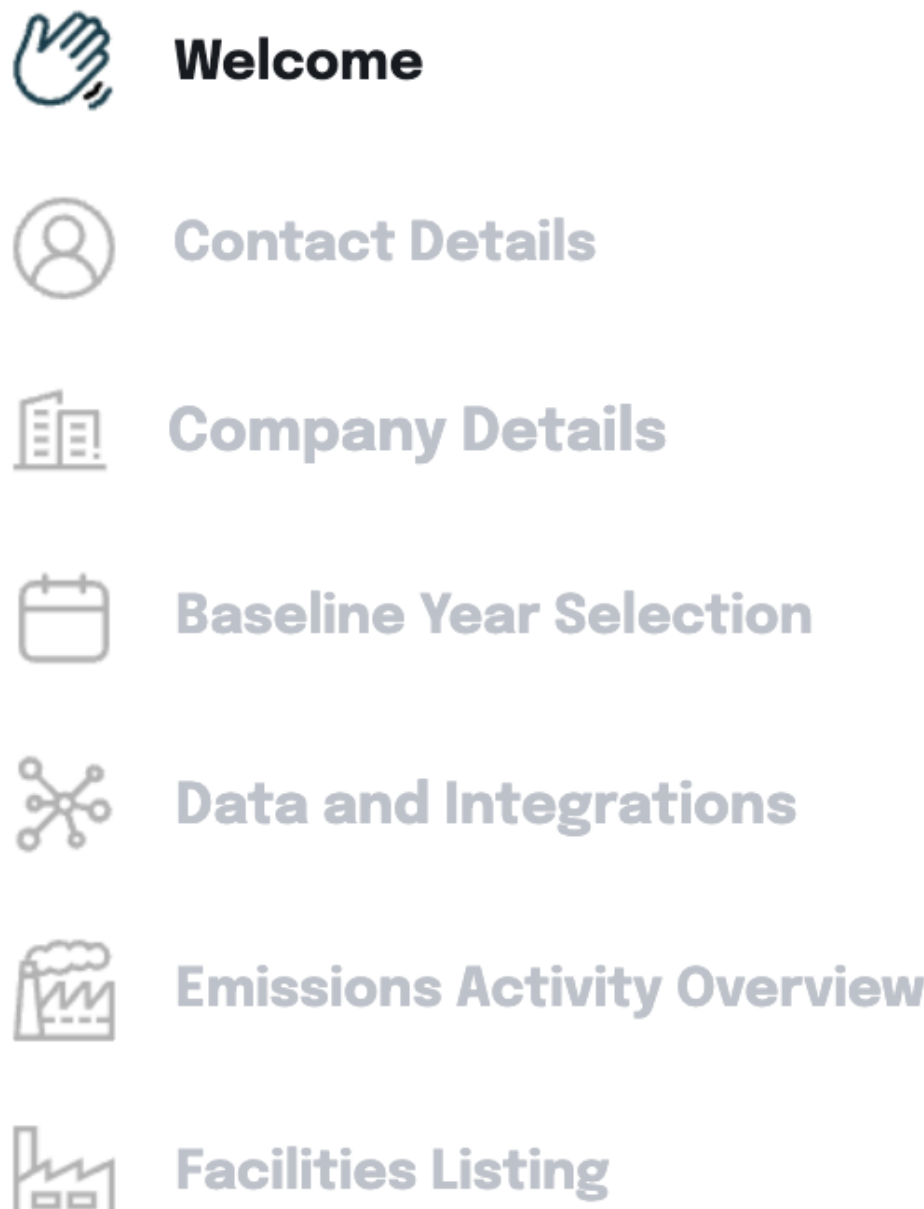
## How we solved the problem

- Designed wireframe to optimize usability of onboarding process.
- Formulated easy icons for navigation to reduce the number of clicks.
- Created a progress bar to encourage users on how many steps are remaining.

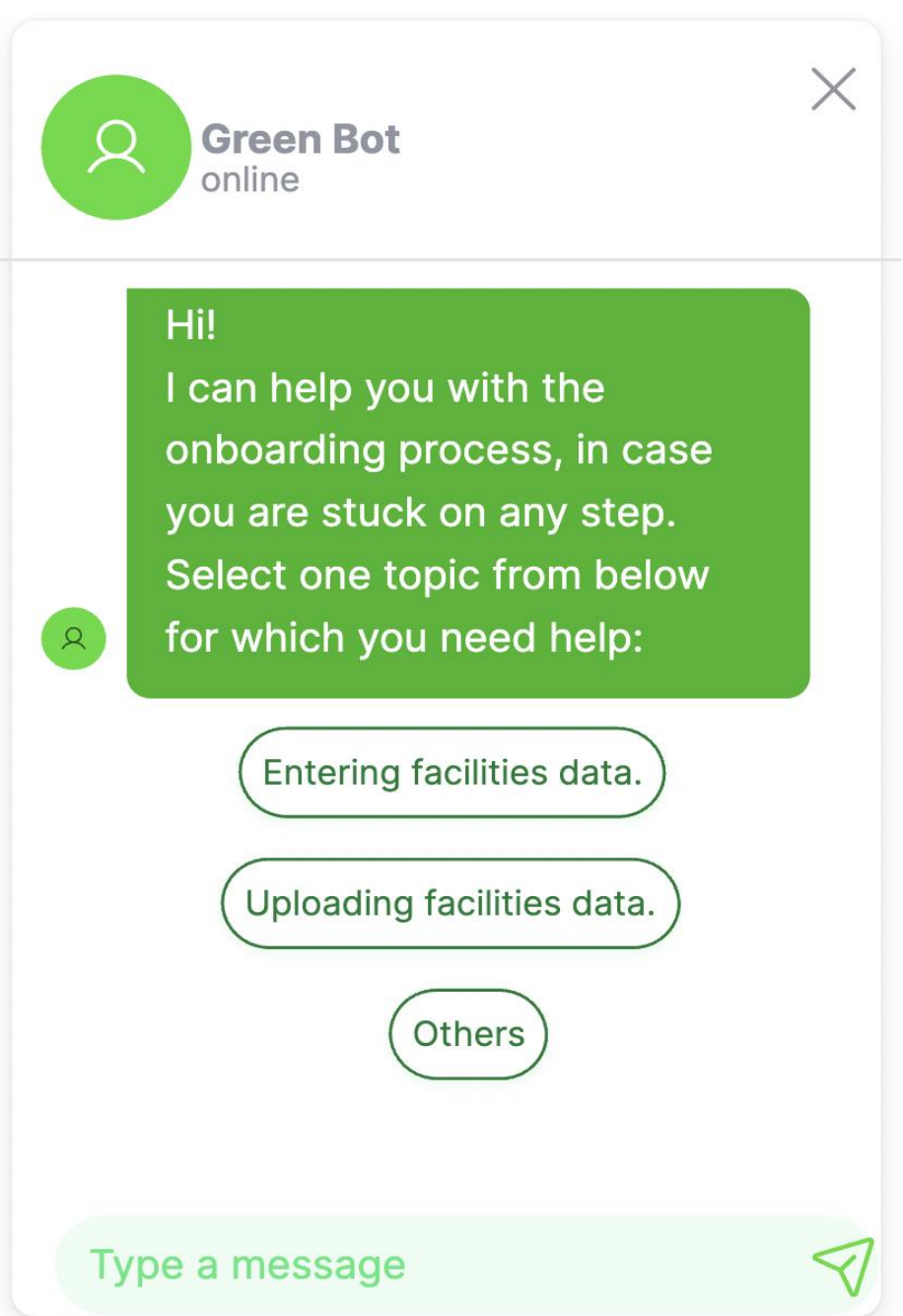
## Documents drop-box



Platforms for uploading utilities and accounting data were inconsistent. Customers should ideally have access to both accounting software and manual utility bill upload options on the same tab.



## Chat Bot



## Progression bar



## Simplified Questionnaire

Does your company :

<input checked="" type="checkbox"/> Recycle	<input type="checkbox"/> Motion sensor lights
<input type="checkbox"/> Compost	<input checked="" type="checkbox"/> New or updated furnace (newer than 2007)
<input type="checkbox"/> Double sided print	<input type="checkbox"/> Energy efficient insulation
<input checked="" type="checkbox"/> Hand dryers	<input type="checkbox"/> Aerated faucets
<input type="checkbox"/> Reusable water bottles	<input checked="" type="checkbox"/> Double flush toilets
<input type="checkbox"/> Reusable utensils	<input type="checkbox"/> Produce renewable energy in the last twelve months
<input type="checkbox"/> Reusable Plates and bowls	<input type="checkbox"/> Purchased any RECs in the last twelve months
<input type="checkbox"/> Smart Thermostat	<input type="checkbox"/> Purchased any carbon offsets in the last twelve months
<input type="checkbox"/> LED lights	

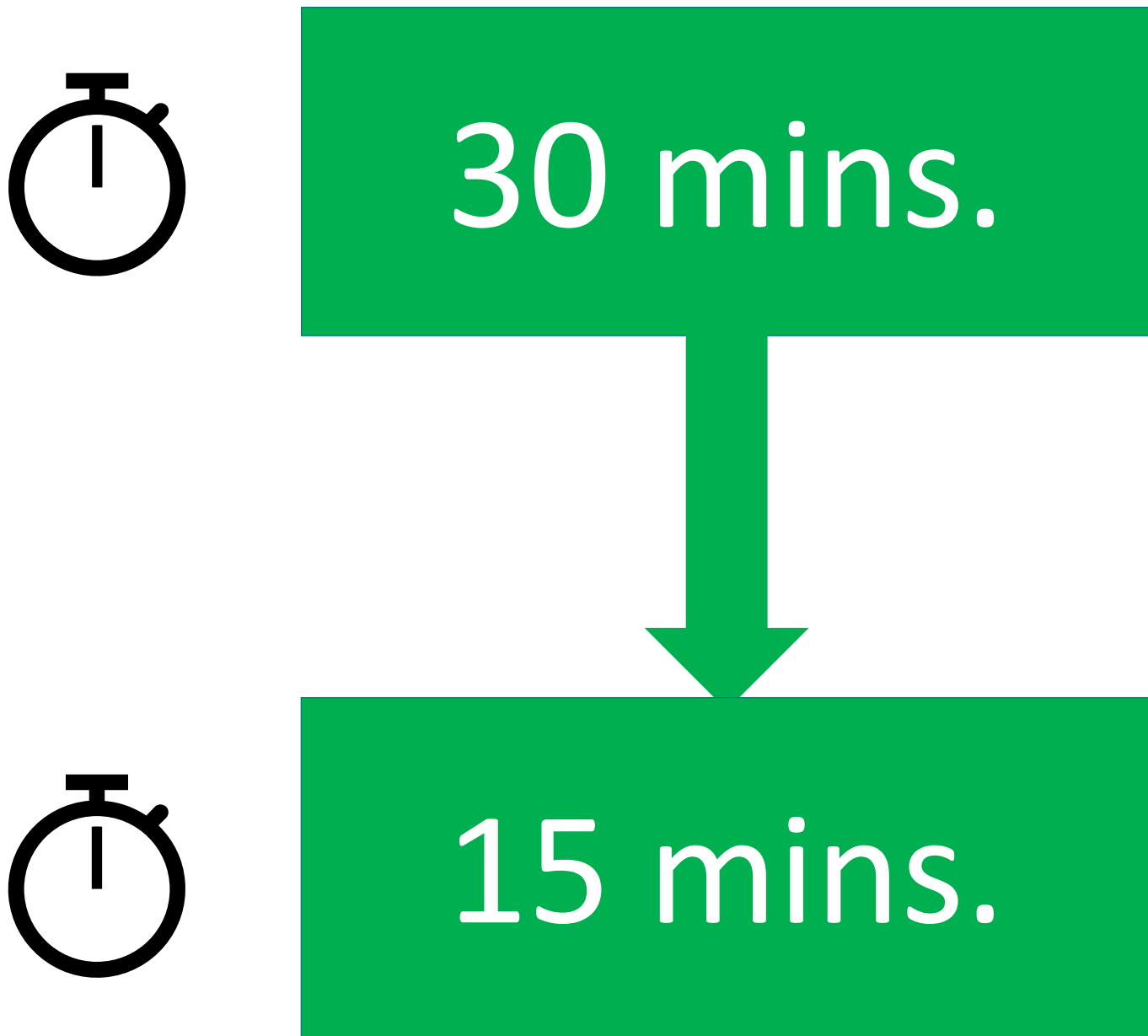
**Carbon Savings Initiatives** survey that originally consisted of a long scrolling of Yes/No questions was reduced to a single page using checkboxes.

## Conclusion and Lessons Learned

- Designed a chatbot to help users with on-demand assistance.
- We created a continuous and smooth flow of the onboarding process.
- Reduced the complexity of the platform.
- Hands-on experience working with a client.
- Collaboration with the client.

## What were the benefits to the organization

Reduced the estimated time taken for onboarding process by **12-15 mins** which originally was **25-35 mins**.



## Acknowledgements

- Luke Baumann, CTO, Green Project Technologies for regularly providing guidance and feedback.
- Prof. Sam Marrazzo and Prof. George Sanders for constant support throughout the project