



# Client Onboarding Experience

---

Designing an engaging and high-touch onboarding experience by leveraging internal and external data

# Outline

---

1. Premise
2. Motivation
3. Methods
4. Results
5. Summary
6. Future Work

# Premise

---



Manual process  
Inconsistent approaches  
Informal coordination  
**+ Untrackable communications**

---

**Creates a high risk for  
losing contract renewals**

# Mission

---

Overhaul the client onboarding process  
from when a Sale is Closed to Welcome Call

## External Goals

- Establish early virtual relationship with clients
- Deliver value through engaging and informative communications
- Increase personalized and transparent user experience

## Internal Goals

- Deliver better client data earlier
- Replace repetitive internal processes with automations
- Reprioritize client touch points to deliver more value
- Leverage HD Portal, SFDC, and Hubspot



# Research Method

---

## Primary Sources

- Sales, Business Intelligence, and Account Management, Sales Support personnel interviews
- Email and internal message chains from respective teams
- SFDC system for managing accounts

## Secondary Sources

- Internal team scripting guides for Sales and Account managers
- Task management documents and online documentation systems access

# Initial Observations

---

At the onset, I noticed a lack of:

- Clients communications guide for internal usage
- Collateral style guide for all external communications
- Consistent tracking of all client-facing product delivery metrics

**"Those don't exist"** - Karla

# Auditing Process

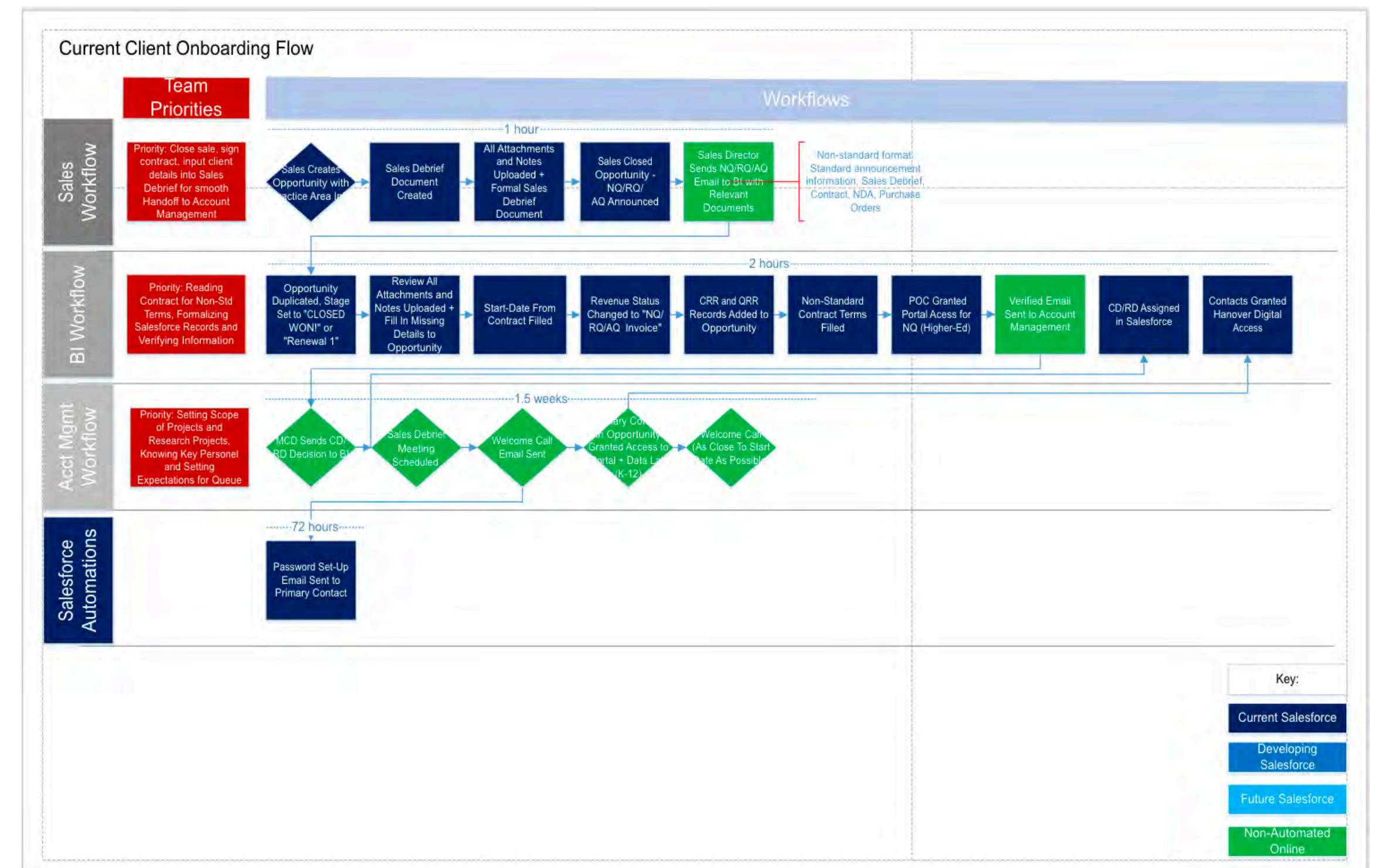
---

To understand the firm's process, I:

1. Went through existing documentation, piecing together internal and external processes
2. Interviewed team members on projected vs actual processing times
3. Mapped-out existing processes to identify pain points

# Audit Summary

After over 10 in-depth interviews examining our team's formal and informal processes, I was able to have a micro-level view of Hanover:





# Team Priorities

---

## Sales

### Team

Close sale, sign contract, input client details into Sales Debrief for smooth handoff to Account Management

## Business

### Intelligence Team

Reading contract for non-std terms, formalizing Salesforce records and verifying information

## Account

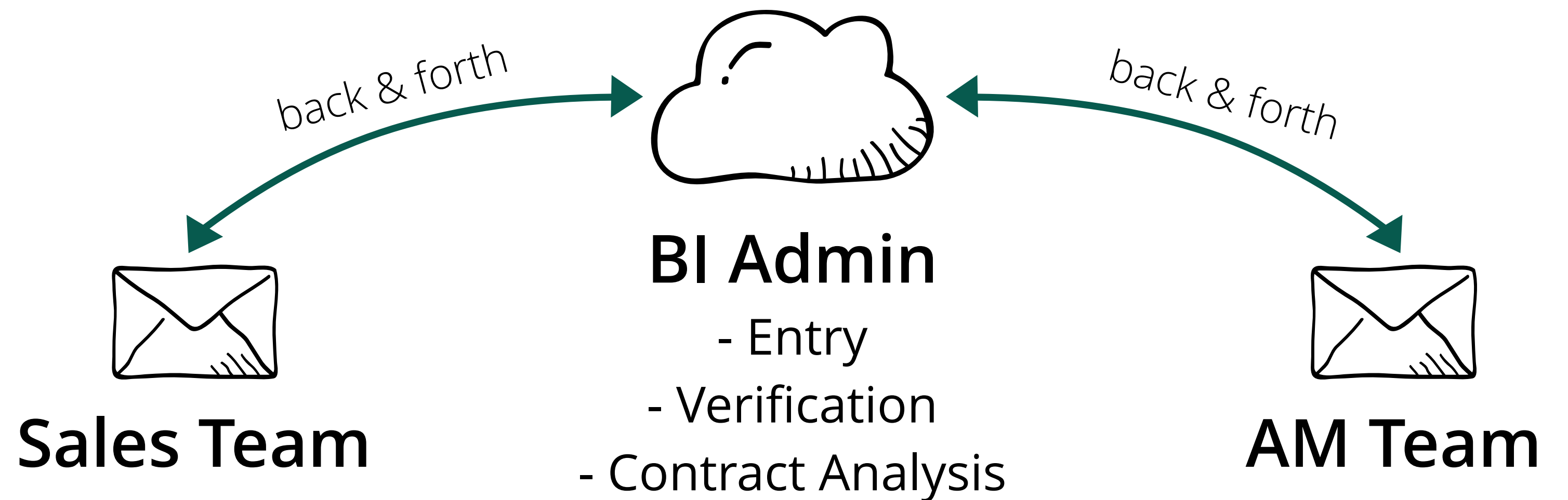
### Management Team

Setting client expectations for queue, connecting key content and research members

# Salesforce Flow

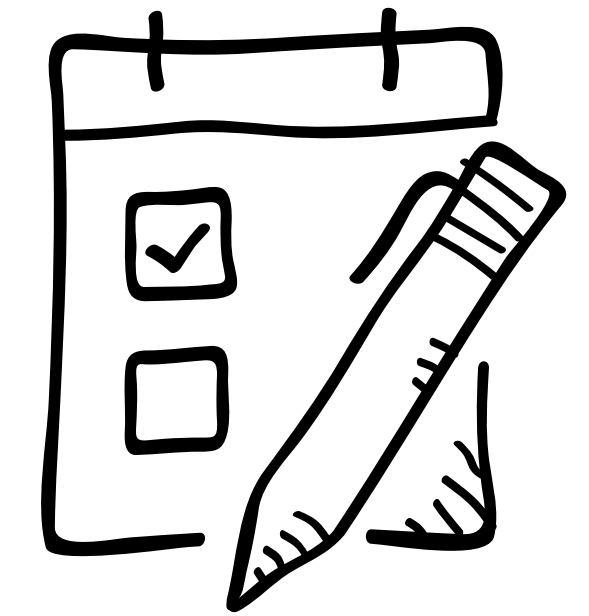
---

Who has  
Salesforce admin  
privileges and how  
does that impact  
each team's  
workflow?



# Trackable Labor

---



Are we able to track a tasks' progress within a team's respective workflow?

- Numerous internal email chains with no Salesforce Tasks to track time and efforts
- Varying methods within teams to keep tabs on client interactions
- **Basis of completion should be based on the successful handoff to next team**

# Findings

---

## Key Findings

1. **Handoff Friction:** Sales handoff to BI non-standardized and difficult to track, with contract and account details sent via email
2. **Information Loss:** with BI entering all contract formalization revenue details and verification, managing info is happening through email, leading to varying wait time client onboarding start times
3. **Manual Comms:** Welcome Call scheduling completely manual with HD portal access requests managed by multiple departments



# Current Timeline

---

Contract Closed

Sales Workflow

BI Workflow

AM Workflow

1

Sales Contract Email

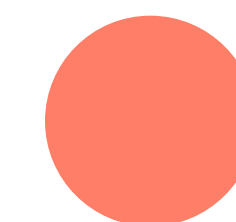
1 hr

2 hrs

2

Welcome Call Scheduling

1.5 wks (business days)

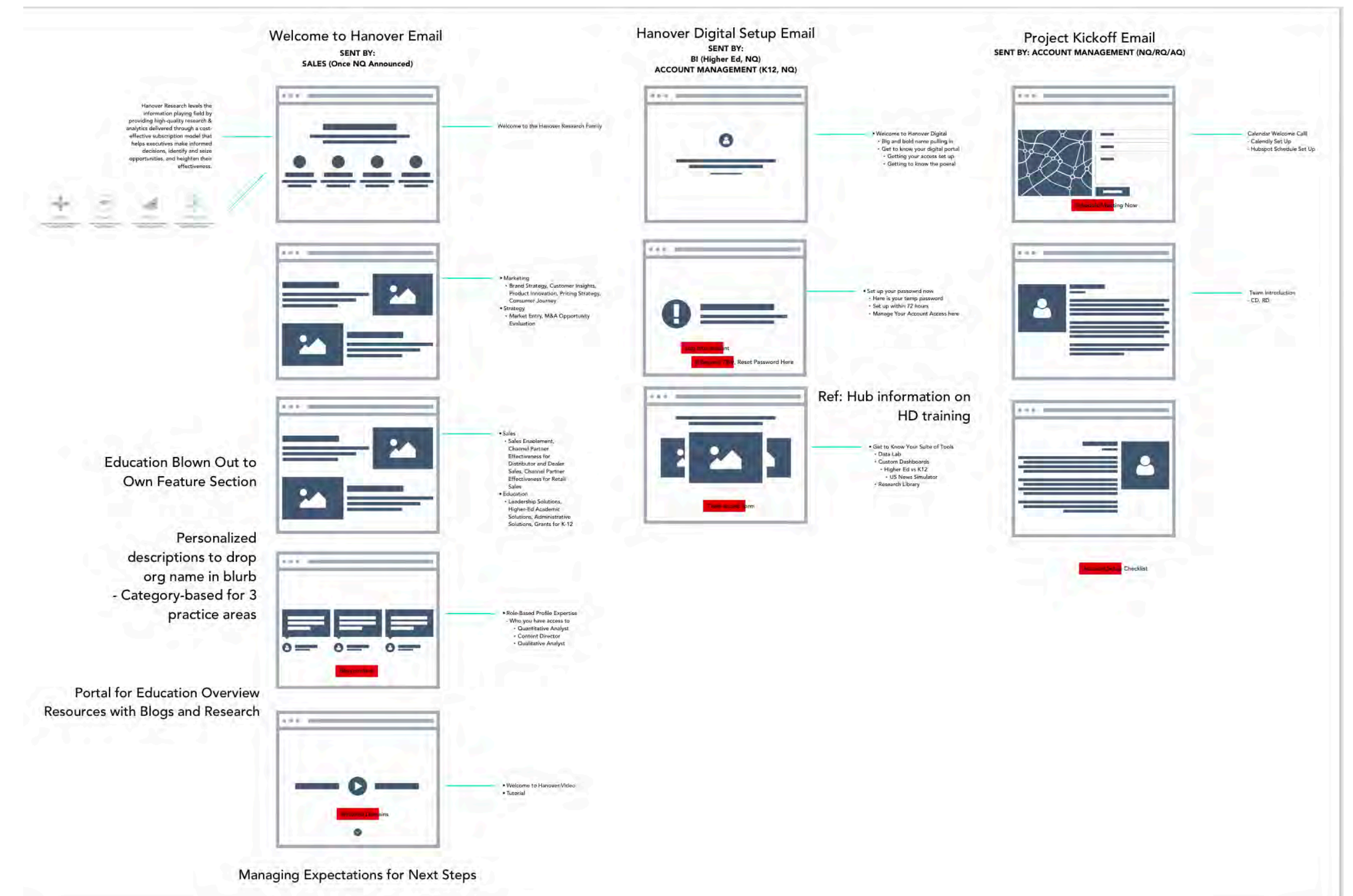


Client Communications

# Concept Design

## Design Priorities

- Quickly established rapport with client
- Early education and tool access
- Personal feel to value delivery

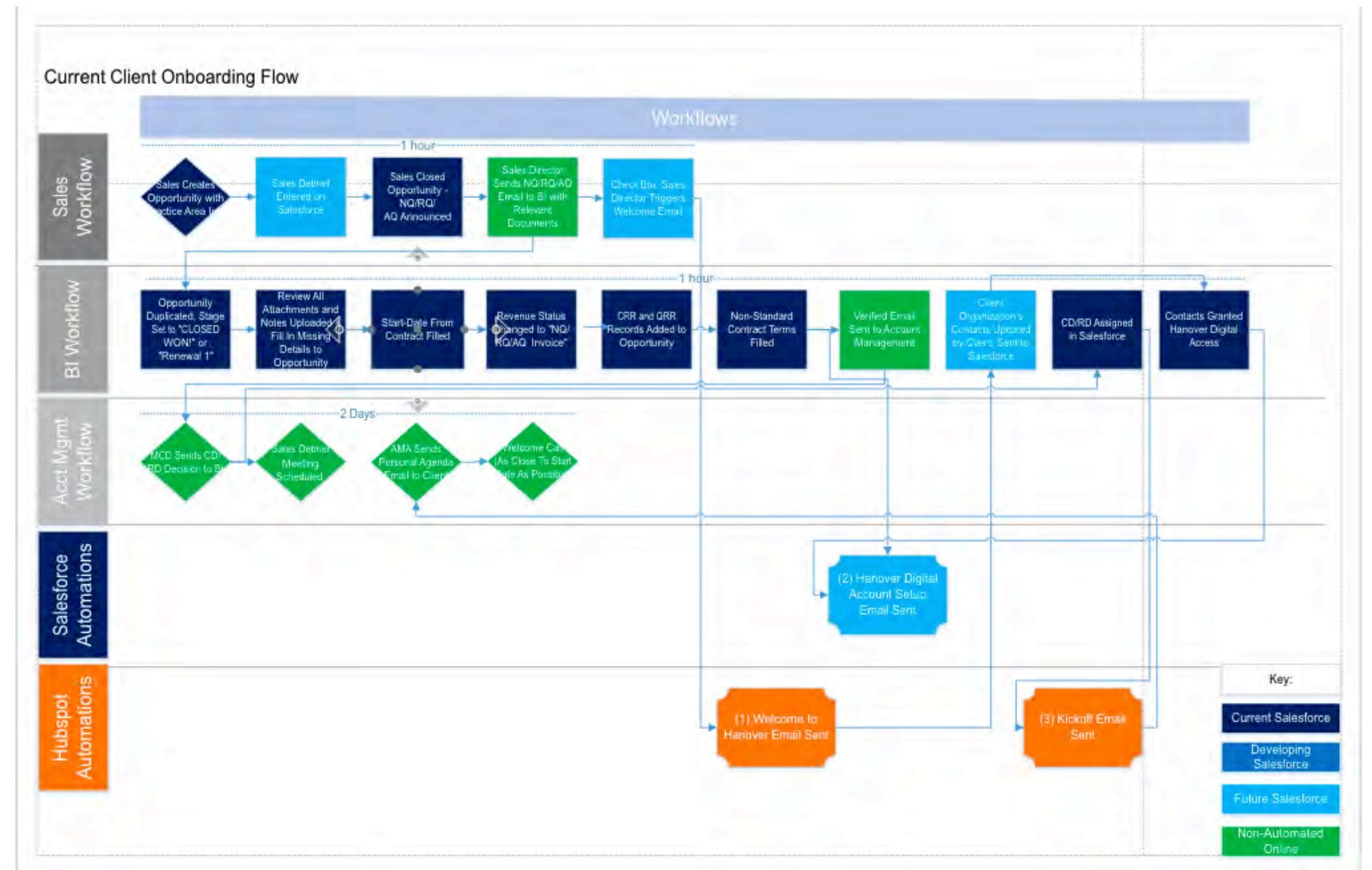




# Concept Design

## Integrations

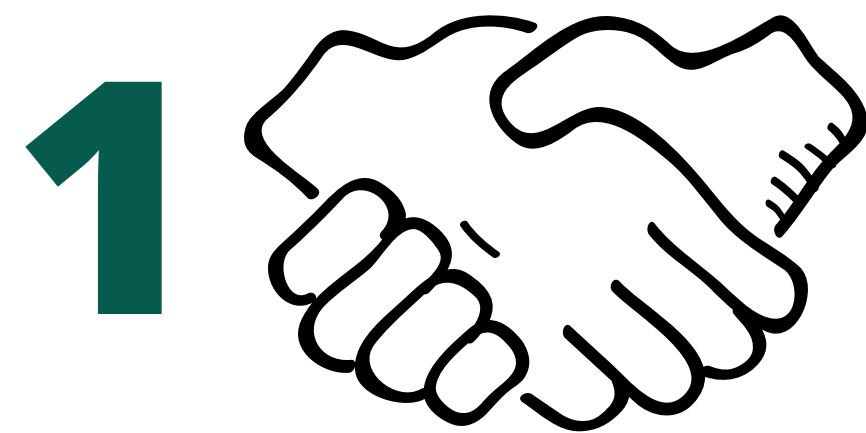
- SFDC Account, Contact, Start-Date, Contract Fields
- Hubspot Email Automation
- Hubspot Scheduling Tool



# Automations Flow

---

## CEO Welcome



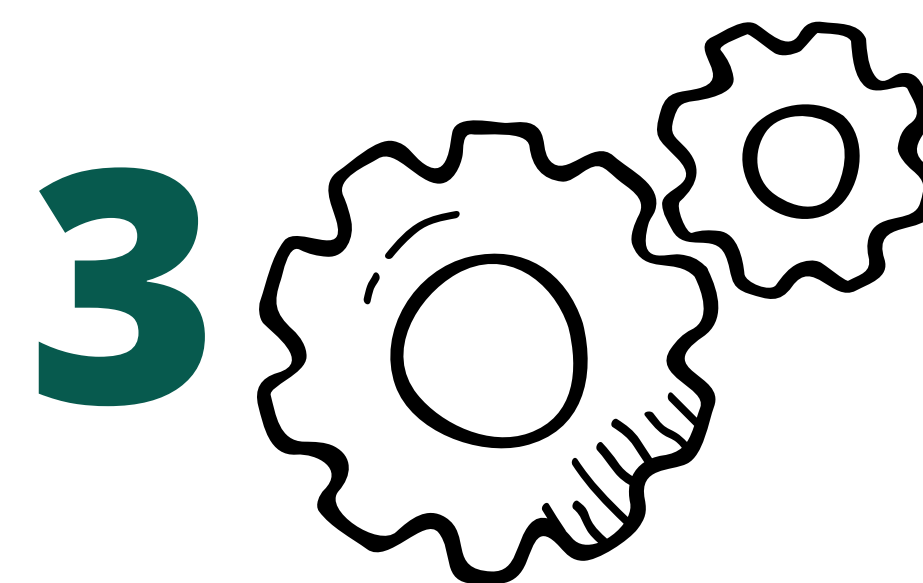
*Sent when:  
Sales announces NQ*

## Hanover Welcome



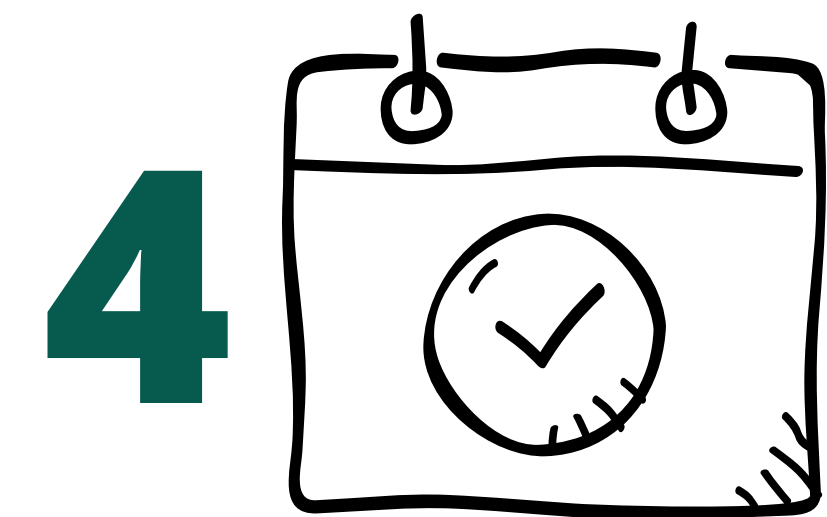
*Sent 24 hrs after:  
Sales announces NQ*

## Hanover Digital Setup



*Sent when:  
Contact granted access*

## Project Kickoff



*Sent when:  
CD/RD assigned to project*



# CEO Welcome

---

## Purpose + CTA

- Hubspot Email using plain text for personal feel to message client right after contract has been signed and processed by Sales Team



Hanover Research  
4401 Wilson Boulevard  
Arlington, VA 22203

Date: July 30, 2018

Wesley Givens  
CEO, Hanover Research

Dear Name Customer,

Thank you for choosing Hanover Research for your information services and market research needs. We are pleased to serve you with the highest quality market research and analysis tools to meet your needs. We have been committed to providing the best service for over 10 years and we want to ensure that we will do whatever it takes to meet your specific needs.

As a token of our appreciation for your business, we would like to offer you early access to our digital portal to access our latest research and case studies. To take advantage of this access, please make your Hanover Digital account as soon as possible, with your setup email coming shortly.

Hanover is available anytime to answer any questions or concerns you may have regarding your new account. We have also assigned John Smith from Client Services to assist you with any other needs you may have.

Welcome to Hanover and we can't wait to get started!

Warm regards,  
Wes



# Welcome

## Purpose + CTA

- Formal Welcome to Hanover, showing all resources while client's attention is still fresh right after contract is signed

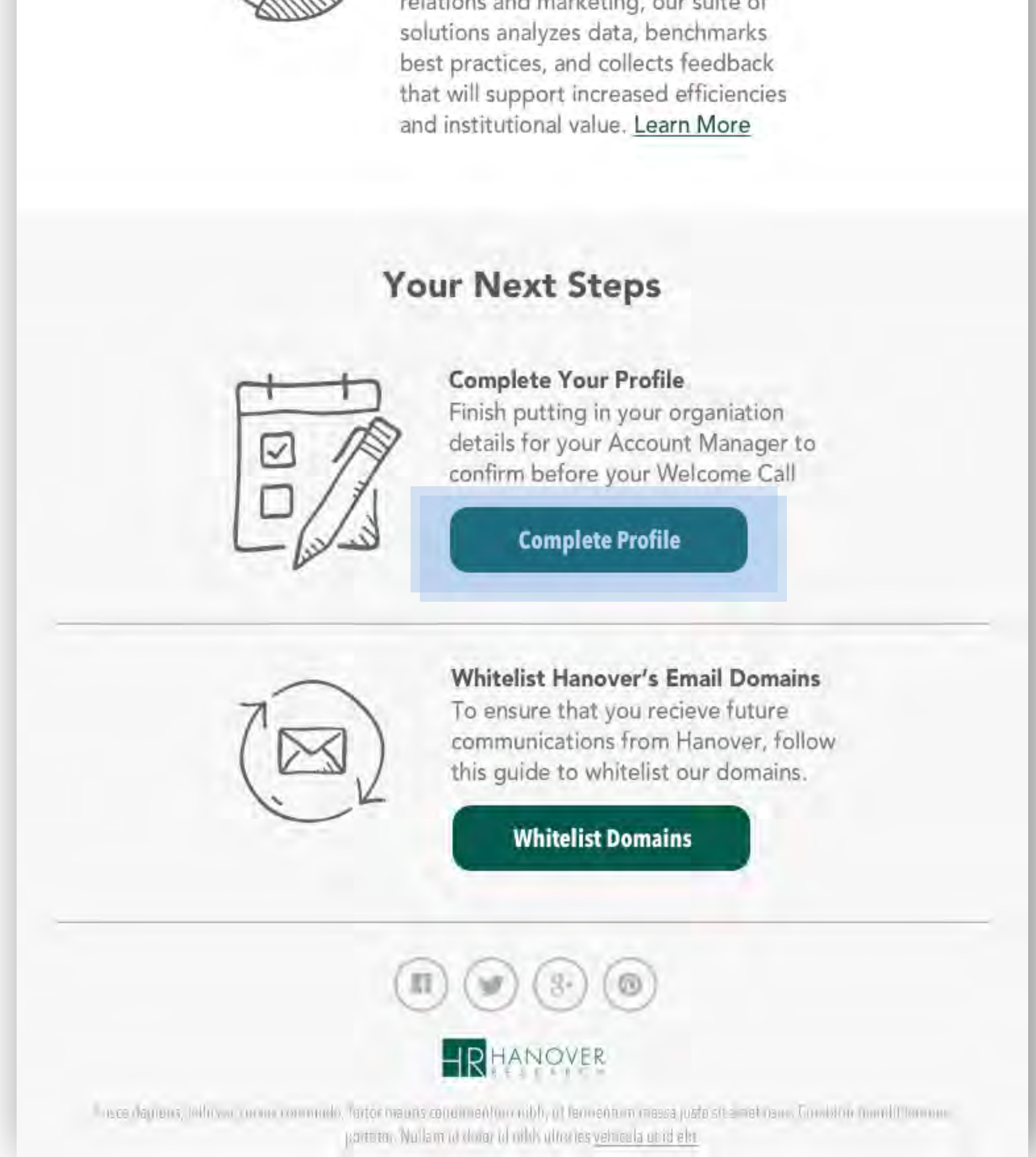




# Welcome

## Purpose + CTA

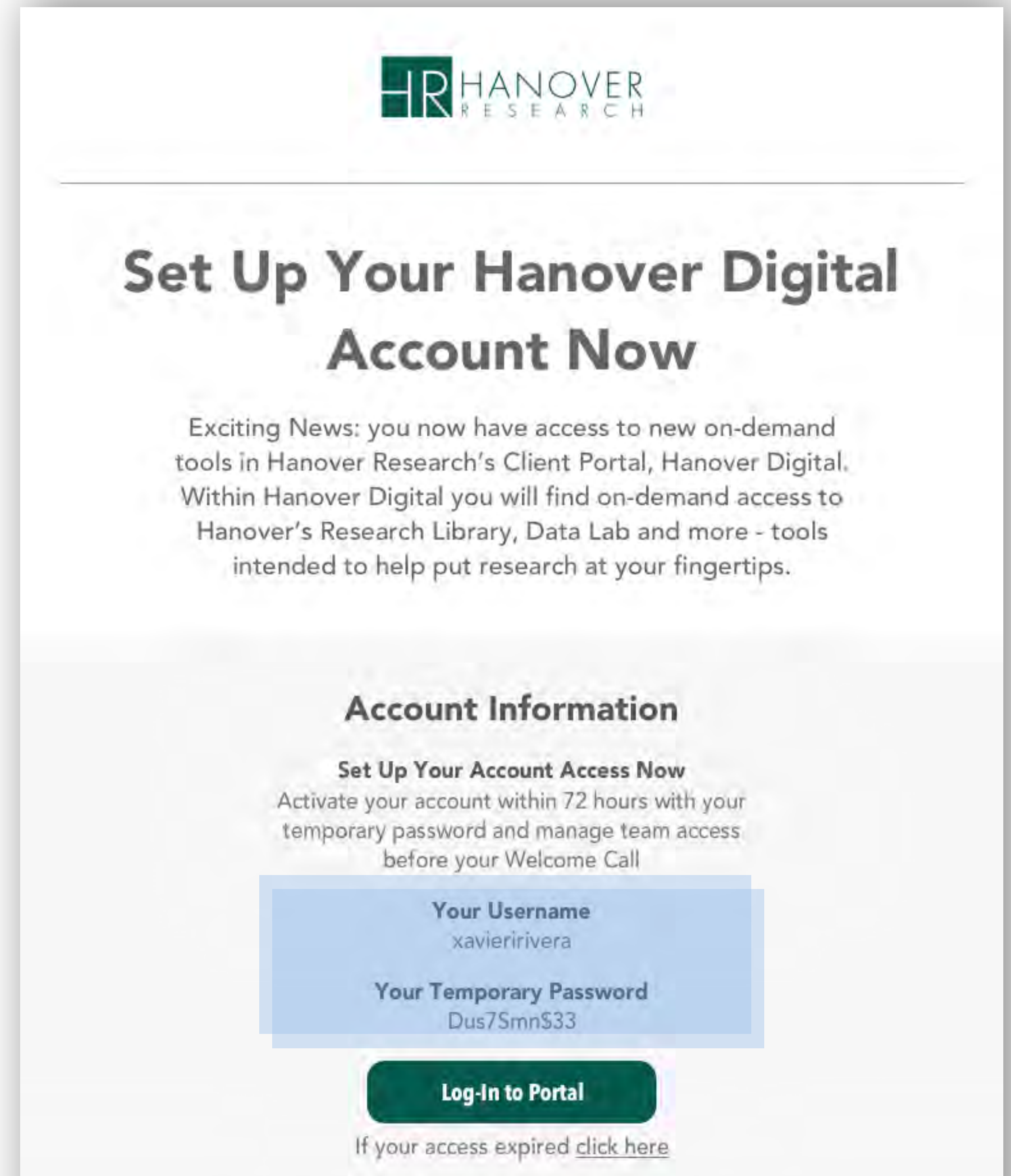
- Complete Profile
  - Verify and add client organization contacts
  - HD Access information
  - Roles of contacts' information
- Whitelist Hanover Email Domains




# HD Setup

## Purpose + CTA

- Welcome to Hanover Digital, showing all resources
- Log in and Set Password within 72 hrs
  - Set new password



The screenshot shows the 'Set Up Your Hanover Digital Account Now' page. At the top is the Hanover Research logo. Below it is a heading 'Set Up Your Hanover Digital Account Now'. A paragraph of text explains that users now have access to new on-demand tools in the Client Portal, including the Research Library and Data Lab. Below this is a section titled 'Account Information' with a sub-heading 'Set Up Your Account Access Now'. It instructs users to activate their account within 72 hours with a temporary password and manage team access before a welcome call. A light blue box contains the user's details: 'Your Username' is 'xavieririvera' and 'Your Temporary Password' is 'Dus7Smn\$33'. Below this box is a green button labeled 'Log-In to Portal'. At the bottom, there is a link that says 'If your access expired [click here](#)'.

 HANOVER  
RESEARCH

## Set Up Your Hanover Digital Account Now

Exciting News: you now have access to new on-demand tools in Hanover Research's Client Portal, Hanover Digital. Within Hanover Digital you will find on-demand access to Hanover's Research Library, Data Lab and more - tools intended to help put research at your fingertips.

### Account Information

**Set Up Your Account Access Now**  
Activate your account within 72 hours with your temporary password and manage team access before your Welcome Call

**Your Username**  
xavieririvera

**Your Temporary Password**  
Dus7Smn\$33

**Log-In to Portal**

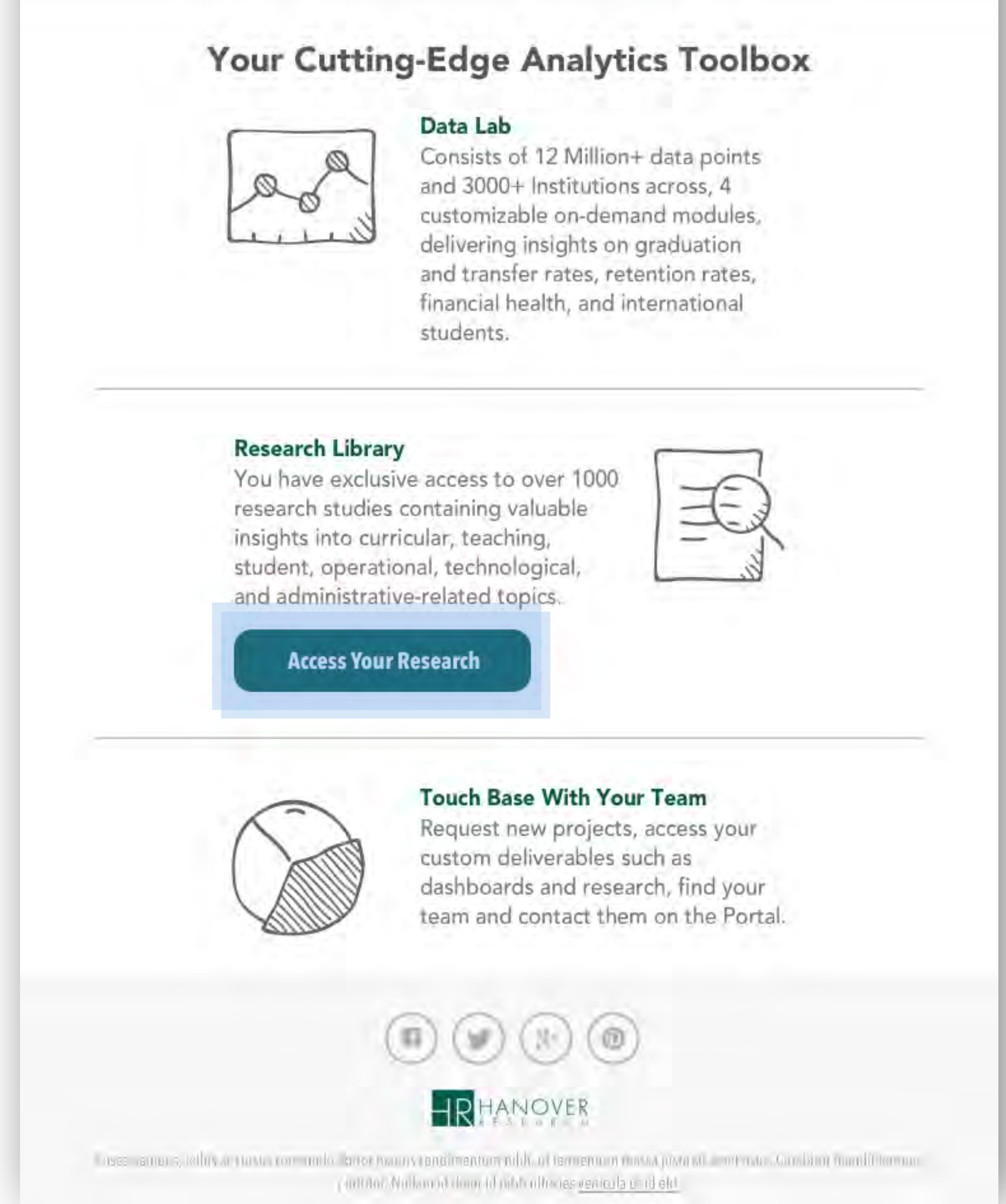
If your access expired [click here](#)



# HD Setup

## Purpose + CTA

- View Hanover's Case Studies + Research
  - Direct link to Research library, requiring client to log in



# Kickoff

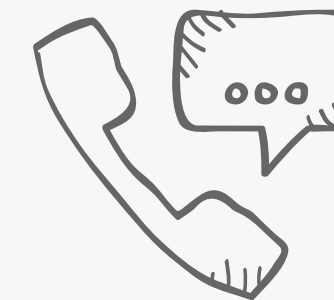
## Purpose + CTA

- Kicks off project welcome, with integrated welcome call scheduler from Hubspot and visual introduction to Hanover personnel
- Schedule Welcome Call
  - Retrieve temporary password from email and set new one

## Let's Kickoff Our New Partnership!

Get started with your account access to Hanover Digital and learn more about our **research** and **custom dashboard solutions**

### Book Your Welcome Call Now



**Choose a time in the next two weeks**  
Your Account Manager, Xavier Rivera is going to have a one-hour Welcome Call to discuss the details of your queue

**Book Appointment**

**Meet Your Team**

# Kickoff

---

## Purpose + CTA

- Log in to HD before Welcome Call
  - Direct link to Portal, with button leading to log in screen

## Meet Your Team

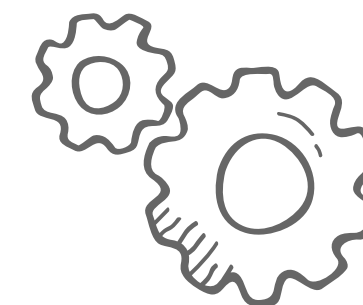


**Matthew Tringali**, Content Director  
Duis mollis, est non commodo luctus,  
nisi erat porttitor ligula, eget lacinia  
odio sem nec elit. Vivamus sagittis  
lacus vel augue laoreet rutrum faucibus  
dolor auctor.



**Phil Handler**, Research Director  
Duis mollis, est non commodo luctus,  
nisi erat porttitor ligula, eget lacinia  
odio sem nec elit. Vivamus sagittis  
lacus vel augue laoreet rutrum faucibus  
dolor auctor.

## Have you finished your Hanover Digital Setup?



### Set Up Your Account Access Now

Get access to your account, set up  
your new password and manage team  
access before your Welcome Call

**Log-In to Portal**

If your access expired [click here](#)

# Current Timeline

---

Contract Closed

Sales Workflow

BI Workflow

AM Workflow

1

Sales Contract Email

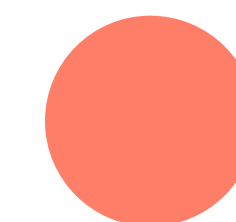
1 hr

2 hrs

2

Welcome Call Scheduling

1.5 wks (business days)



Client Communications



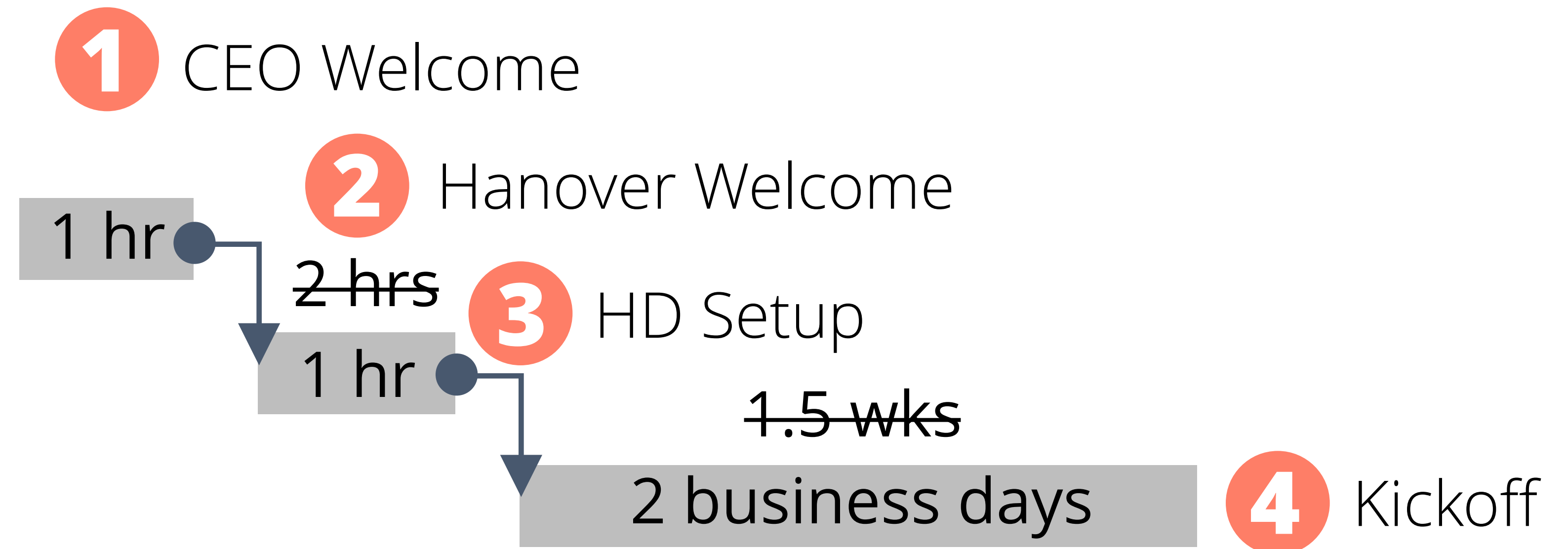
# New Timeline

Contract Closed

Sales Workflow

BI Workflow

AM Workflow



● Client Communications

# Summary

---

- Manual process
- Inconsistent approaches
- Informal coordination
- Untrackable communications

**Creates a high risk for losing contract renewals**



## Hanover Client Experience (CX)

- Earliest Possible Value Delivery
- Client touch points at critical timing, aligning with existing internal decision points

**Automation-driven and standardized onboarding process to pinpoint and fix any friction quickly**

# Future Work

---

- User-testing within practice areas
- Hubspot Email Template Creation
- Hubspot Scheduler
- Salesforce Automation Requirements
- Finalization and socialization of email copy

# Thank You!!!