

## Orchestrated Onboarding® Masterclass Syllabus

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### Overview

**Are you serious about growth?  
Then, it's time to get serious about how you onboard your customers.**

A successful customer onboarding program results in more satisfied customers and employees, higher solution adoption, and increased customer lifetime value.

The Orchestrated Onboarding® Masterclass delivers a front row seat and tailored guidance from Customer Onboarding Expert, Donna Weber, in a series of intimate and interactive sessions. Course benefits include:

- Come with your current customer onboarding approach. Leave with your optimized framework
- Master best practices to transform new customers into loyal champions
- Quickly guide new customers to value through a prescriptive and proactive process
- Learn with a cohort of peers in an interactive environment
- Obtain exclusive examples, resources, and templates to quickly drive your impact

This three-week masterclass includes three 2.5 half-hour sessions, with options to include 1:1 coaching with Donna Weber.

Go to [www.donnaweber.com/onboarding-masterclass](http://www.donnaweber.com/onboarding-masterclass) to get all the details and to sign up.

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### Audience

This Masterclass is for you if you are in a customer facing role, whether practitioner or leader on the following teams: Customer Success, Onboarding, Implementation, Customer Education, Professional Services, and Support.

Come with your team mates to learn and transform your organization together. Discounts are available for more than four participants from the same team.

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### Learning Objectives

The Orchestrated Onboarding Masterclass enables you to:

- Explain why onboarding is the most important part of the customer journey
  - Quickly drive customers to success
  - Create an optimized framework to onboard and enable your customers
  - Deliver value to customers and your company
  - Determine the cost of customer onboarding
  - Break down silos to create a seamless customer experience
  - Determine how to measure your success
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### Participation & Assignments

Active participation and assignments throughout the three-week course ensure participants get the most from the Masterclass. Please block out one to two hours each week to complete the assignments.

Masterclass text: To ensure the limited class time is dedicated to tailored guidance and discussion rather than basic concepts, the course text is [Onboarding Matters](#).

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Pre-work: Read Introduction and Part 1 of *Onboarding Matters*.

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### Session One

In session one, you'll learn the impact customer onboarding has on your company and your customers.

#### Topics

- Why onboarding is the most important part of the customer journey
- The costs of treating every customer with special care
- The neuroscience of customer onboarding
- The six stages of Orchestrated Onboarding: Embark, Handoff, Kickoff, Adopt, Review, and Expand
- First value and quick wins

#### Assignments:

- Read Part Two of *Onboarding Matters*
  - Read from Touchpoints to Journeys
  - Map the first half of your optimized onboarding framework
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### Session Two

Session two details how to quickly drive new customers to value.

#### Topics

- Driving customers to value
- Success plans
- Listening to customers
- Review the first half of your optimized onboarding framework with Donna and the cohort

#### Assignments

- Read Part Three of *Onboarding Matters*
  - Map the second half of your optimized onboarding framework
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### Session Three

Session three aids you in transforming your company and your customers' companies.

#### Topics

- Measuring the impact
- Communicating with visuals
- Scaling customer onboarding and enablement
- Review the second half of your optimized onboarding framework with Donna and the cohort
- Putting Orchestrated Onboarding into practice
- Ongoing onboarding

#### Assignments

- Listen to a handful of customers
  - Pick a few baseline metrics to start measuring
  - Put your new onboarding framework into practice
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