

Orchestrated Onboarding® Masterclass Syllabus

Overview

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

A successful customer onboarding program results in satisfied customers and employees, higher product adoption, and increased net revenue retention (NRR).

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:

- Creating an optimized onboarding framework to drive customers to value
- Mastering best practices to transform new and existing customers into loyal champions
- Delivering a scalable, proactive, and prescriptive process that delivers results for your company
- Learning with a cohort of peers in an interactive environment
- Obtaining exclusive examples, resources, and templates to quickly drive your impact

This four-week Masterclass includes four, two-hour sessions with options to include individual coaching with Donna Weber.

Go to www.donnaweber.com/onboarding-masterclass to get all the details and to sign up.

Audience

The Orchestrated Onboarding Masterclass is for you if you are in a customer facing role as a practitioner or leader on the following teams: Customer Success, Customer 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 three participants from the same team.

Learning Objectives

The Orchestrated Onboarding Masterclass enables you to:

- Explain why onboarding is the most important part of the customer journey
 - Quickly engage new customers and keep them accountable
 - Create an optimized framework to onboard and enable customers
 - Deliver meaningful value to your customers and your company
 - Calculate the cost of onboarding customers
 - Break down silos to create a seamless customer experience
 - Determine how to measure your success
 - Roll out the new onboarding process successfully
 - Re-onboard your existing customers
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Participation & Assignments

Active participation and assignments throughout the four-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](#).

Pre-work: Read Introduction and Part 1 of [Onboarding Matters](#).

Session One

Onboarding is the Most Important Part of the Customer Journey

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

Topics

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

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

Driving Customers to Value

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

Topics

- Driving customers to value
- First value and quick wins
- Success plans
- 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

The Principles of Orchestrated Onboarding

Session Three aids you in transforming your company and the companies of your customers.

Topics

- Listening to customers
 - Measuring the impact and articulating what it costs to onboard customers
 - Review the second half of your optimized onboarding framework with Donna and the cohort
 - Ongoing onboarding
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Assignments

- Listen to two to three customers
 - Gather data to calculate onboarding costs
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Session Four

Putting Orchestrated Onboarding into Practice

Session Four covers all you need to roll out a successful and impactful Orchestrated Onboarding program.

Topics

- Calculating onboarding costs
- Communicating with visuals
- Scaling customer onboarding and enablement
- Exploring the onboarding technology stack
- Customer Re-Onboarding
- Successfully rolling out the optimized onboarding approach

Assignments

- Pick a few baseline metrics to start measuring
 - Put your new onboarding framework into practice
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About Donna Weber



Creator and instructor Donna Weber is the world's leading expert in customer onboarding. For more than two decades, she's helped high-growth startups and established enterprises turn new and existing customers into loyal champions.

High growth companies hire Donna to increase customer retention, decrease time to initial value, increase customer lifetime value, reduce implementation time and costs, increase product usage and adoption, and scale Customer Success organizations.

Her award-winning book is [*Onboarding Matters: How Successful Companies Transform New Customers Into Loyal Champions*](#).

Learn more at DonnaWeber.com and by emailing Donna: donna@donnaweber.com.
