

# 100 Day Onboarding Plan

## WHAT IS THE CLIENT SUCCESS ONBOARDING JOURNEY?

The VALD Client Success Team is here to support our clients in the implementation and adoption of VALD systems into their organization's unique context.

During the first 100-days with VALD, new clients are proactively engaged in onboarding activities by a Client Success Manager (matched with clients based on expertise, experience, and geography) who use their applied knowledge to execute implementation solutions to help clients and derive value from their new system/s. These engagements often come in the form of emails, online calls, webinars, and site visits. It is up to the Client Success Manager and their client to manage the engagements most appropriately for their needs.

## WHAT CAN CLIENTS EXPECT TO RECEIVE?

- ✓ Personalized guidance to fit their organization's needs
- ✓ Detailed implementation and advance usage resources
- ✓ Open two-way communication with your Client Success Manager
- ✓ Continued professional and personal development opportunities
- ✓ Expertly lead webinars and tutorials
- ✓ Access to our specialized team to support in troubleshooting technical and workflow issues

## WHAT DOES THE FIRST 100 DAYS LOOK LIKE?

### STAGE 1

#### GETTING STARTED (WEEKS 1 – 3):

Clients are sent necessary information via email to get started using their VALD system/s, including:

- ✓ Access to VALD Hub and other applicable software
- ✓ Resources - Getting Started Guides & User Guides
- ✓ Introduction to Client Success Manager
- ✓ Support to start basic testing and reporting using the new system

## STAGE 2

### **FOUNDATIONAL KNOWLEDGE** (WEEKS 3 – 6):

Foundational knowledge is developed through a client success onboarding call.

This onboarding call will build the client's knowledge of:

- ✓ Testing protocols
- ✓ Managing Profiles and reporting in VALD Hub
- ✓ Managing Groups and Categories in VALD Hub
- ✓ Available software integrations



## STAGE 3

### **WORKFLOW REFINEMENT** (WEEKS 6 - 9):

The workflow refinement stage is an opportunity to check-in on the client's onboarding progress to ensure that value is being derived from the system. This stage could comprise of email correspondence or an additional onboarding call. The client will be supported to:

- ✓ Embed the new VALD systems within their business context
- ✓ Ensure all users are upskilled in advanced testing practices and protocols
- ✓ Seek support in workflow adoption challenges
- ✓ Upskill in specific application of system



## STAGE 4

### **ADVANCED APPLICATION** (WEEK 9 – 12):

The final stage of onboarding is a client-lead check-in engagement to ensure that the client is feeling confident with system usage. This stage will be based on the client's needs within their business context.



## WHAT HAPPENS NEXT?

Following the first 100-days clients will be proactively supported through regular Client Success engagements as well as be a resource for clients to tap into should they require additional support in any facet of system adoption.