

**SESSION #1**

CS Leadership Bootcamp - Q2 2024

# Re-Onboarding: Proactive Approach to Improve Adoption, Address Turnover and Support Program Evolution

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**DID YOU  
KNOW?**

The Average Business  
Changes it's Strategy  
at Least Once Every  
12 Months.

On average, a company will evaluate  
it's strategy once every 12 months -  
The company will have new priorities,  
new goals and new initiatives.

In 2023, companies planned  
**721,677 job cuts,**  
a 98% jump from 2022.

# TEAMS ARE CHANGING

## Gen Z

**Plan on changing jobs with  
in 18-24 months.**

Almost two-thirds of Gen Z workers plan to leave their current employer within the next two years.

## Millennials

**Will stay with a company  
for 2-5 years.**

Almost half of Millennials intend to stay at their current employer for two to five years or longer.

## Gen X

**Will stay with a company  
longer than 5 years.**

Nearly two-thirds of Gen X expect to stay with their companies longer than five years.

**TEAMS AND  
STRATEGIES  
ARE CHANGING  
AND SO IS  
THEIR USE OF  
YOUR  
SOFTWARE.**





# Launch of Systematic Reonboarding

right  
relation or f  
point of view

# Objective

goal intent  
to achieve  
based on  
t for

- Allows us to realign with customers on goals and objectives
- Re-establish relationships with leaders
- Opportunity to re-deploy and improve adoption with change management and end user training

# Criteria for Reonboarding

Which are the right customers to focus on and why?

01. Poor adoption or lack of strategic use cases
02. Executive or Main POC turnover in the past 6 months
03. Renewal is 5+ months away
04. ARR is XYZ or Greater
05. Customer for 18+ Months
06. Executive is bought in, supportive and engaged

## DEFINING REONBOARDING

# WHAT DOES THE REONBOARDING PROGRAM LOOK LIKE?

Kickoff Meeting - Establish the objective with the Executive stakeholder

Define 1 goal for the program - How will we know it's been a success?

Create a plan - no more than 4 sessions. This should be half the effort of the original program.

End user training and enablement to ensure proper adoption.

30 Day Post Onboarding Review to ensure proper usage and value realization.

# KICKOFF MEETING

- Align on the objective for the reonboarding
- Commit to one focus area or use case that should be directly inline with a priority for the leadership team
- Define key players in the program and their roles and responsibilities
- Establish expectations for both sides



# ESTABLISH GOALS

- Determine the goal for the reonboarding program
- Outline the KPIs for measurement
- Set a baseline for the start of the program to benchmark against
- Have a shared and visible tracker for accountability and ownership

## Goal Setting

- S Specific
- M Measurable
- A Attainable
- R Realistic
- T Time-bound

# CREATE YOUR PLAN

- Create a modified plan that can be easily built for each customer
- Modify the modules or content based on the customers needs and outcomes
- Assign ownership to the customer
- Share weekly updates on progress with the broader team



# END USER TRAINING

- Establish the audience for any training sessions
- Lead with hands on session or workshop style to keep folks engaged
- Collect feedback before and after to focus on critical areas
- Track metrics to measure effectiveness and impact of sessions



# 30-DAY FOLLOW UP

- Establish an appropriate timeline with your customer to follow up
- Set a call or meeting in advance to not have scheduling issues
- Review data and the plans in advance of the call and share talking points prior to the meeting
- Align on the necessary next steps





# TAKE NOTE

1. Establish your business objectives in advance of designing a formal reboarding plan
2. Define your criteria and stick to it - this will make managing a program much easier
3. Design a repeatable process for your Customer Success team to execute against
4. **PRIORITIZE!** If bandwidth is a challenge, prioritize where there is mutual benefit
5. Measure the impact of the program

**THANK YOU**  
**Q&A**