# 4 Ways to Improve Client Implementations in a Hybrid Work World

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The coronavirus pandemic changed just about everything in our lives—including how, when, and where we work. Overnight, offices across all industries and around the world closed, and entire companies shifted to full-time remote work.

Now, as the pandemic subsides and offices reopen, many employees are choosing to stay remote. And many employers are embracing the benefits of a more flexible, hybrid workplace.

The benefits of a workplace model in which employees can move between in-person and remote work include cost savings for employers and higher productivity and morale for employees. But there are some potential pitfalls as well, especially during the new client implementation and onboarding process.

The hybrid workforce—where some employees work in the office and some work remotely—can exacerbate some common difficulties with the implementation and onboarding process, including

- stakeholder confusion about project status and responsibilities,

- missed or ignored steps, and

- a lack of clear communication.

Now more than ever, implementation managers need a tool built just for them—one that speeds up the implementation and onboarding process by reducing friction and enabling a self-service work model.

COMMON DIFFICULTIES with the implementation and onboarding process:

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**?**

Missed or ignored steps

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A lack of clear communication

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# 1. Trust Is the Currency of the Hybrid Workplace

As products become more commoditized, trust is increasingly a company's most important currency. This is even more true in the hybrid workplace: Even as remote work has become more common and shows signs of becoming more permanent, [many companies are experiencing an erosion of trust](#).

The implementation and onboarding process is the perfect chance to make a good first impression and start building a relationship of trust, but only if it is done correctly. [Eighty percent of future profits](#) come from 20 percent of your existing customers, so getting it right here really matters.

Predictability and transparency are key to reducing anxiety and making everyone comfortable. Giving customers insight and perspective into the process helps increase trust within your own internal teams and with your clients. Here are some questions to consider:

- Do you deliver what you say you will when you say you will?
- Do your customers have visibility into what is happening and what may be causing delays?

Miscommunications and misunderstandings are common in virtual work. Once trust is lost, it can be very hard to restore—if you can get it back at all.
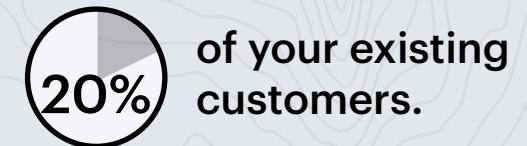
To hear more about how trust impacts revenue, watch GUIDEcx® CEO and founder Peter Ord's presentation:
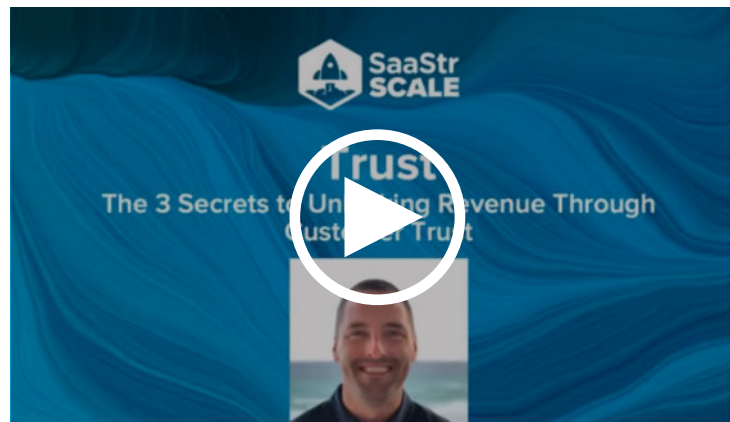


**The 3 Secrets to Unlocking Revenue Through Customer Trust**

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──── COME FROM ────

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## QUESTIONS TO INCREASE TRUST
within your own internal teams and with your clients include the following:

**?**

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**?**

Do your customers have visibility into what is happening and what may be causing delays?

# 2. The Traditional 9-to-5 Workday Is Gone

With apologies to Dolly Parton, the sudden shift to remote work shattered the 9-to-5 workplace paradigm. Flexibility is the mantra of the new hybrid workforce. After a year of juggling work-from-home schedules, remote learning, and other responsibilities, employees are used to getting their work done when and where they can. And that's not likely to change any time soon.

This flexibility is great for employees, but it can make the job of a project manager or implementation manager much more difficult. How do you make sure your project is moving forward if your stakeholders aren't available during regular business hours?

While your teams may not be in the office 24/7—or ever—your implementation software can be. Even without the pressures of COVID, many of your clients have more pressing matters filling their days. Regardless of the circumstances, they can't spend all their time completing tasks for an onboarding project.

## Flexible Onboarding for Flexible Schedules

GUIDEcx offers a self-service model that lets team members and stakeholders make a plan to complete their tasks when and where it is convenient for them. For example, a recent analysis conducted by GUIDEcx found that users completed 70 percent of tasks outside of business hours.

So how does this self-service model work? Key components of the model include the following:

- Automated task-related reminders—including assignments, overdue notifications, and updates—that eliminate the need for manual follow-up and meetings about meetings.

- Overall project views that help everyone see where the project is, what comes next, and who is responsible. Your customer should never have to call you to find out where their project stands.

- Access to tasks—including the ability to update tasks or mark them as complete—without logging into the system.

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**Automated task-related reminders**

- Assignments
- Overdue notifications
- Updates

**Overall project views**

**Access to tasks**

# 3. Customers Need Effective Communication Anytime, Anywhere

Hybrid work is here to stay. Project stakeholders, both for your company and your customers, could be working from any location and at any time. That makes client communication a challenge.

So, how can your implementation teams make sure everyone knows what's going on and what their responsibilities are? First, you need the right implementation and onboarding software solution. Predictable automation will make the onboarding process as simple and frictionless as possible for your customers, and it will make your implementation teams more efficient.

## Stay in Touch Whenever, Wherever

GUIDEcx lets you establish prebuilt task descriptions that are detailed and clear so everyone understands what to do. The system also takes care of sending tasks to the right people at the right time. Task descriptions in GUIDEcx can include checklists and step-by-step directions, such as "Mark this task as 'Done' when you've completed the required action." You can even add video explanations or screenshots to your task descriptions for ultimate clarity, helping your clients feel comfortable getting started.

GUIDEcx also gives you flexibility to say how many days a task should take and what else needs to be done before or after. Automated notifications go out when your customers are assigned tasks or when they miss deadlines so you know if something is going on that could impact the project timeline.

## A Single Project View
## No Matter Where You Are

GUIDEcx offers comprehensive project overviews and timelines so everyone can see exactly where the project stands, no matter where they are and no matter how they prefer to access project information. For example, a mobile app lets everyone on your project access the information they need, how and when they want. Other features to look for include a project overview page and email status reports that keep everyone in the loop and help implementation managers see when tasks are completed—or stalled.

With the GUIDEcx project overview, you can do the following:

- Pick the project view you like best

- See where the dependencies are and what is creating any bottlenecks

- Get up-to-date information so no one repeats work or falls behind

- Communicate with the team in a centralized location where everyone can access notes easily

If there are any updates to the delivery timeline—for example, if a user completes a task early—the dependent deadlines move up automatically. If they complete a task late and the deadline slips, GUIDEcx sends an automated project and timeline update, so everyone has the latest information all the time.

> GUIDEcx also lets you invite as many people as you want to a project **at no extra cost**, so all the right people have all the right information when they need it.

# 4. A Unified Project View Unites Remote Teams

Not only are employees in the same city working from different locations—some in the office and some from home, for example—but you probably also have team members, stakeholders, and clients working across different cities and time zones.

With project stakeholders separated by distance and time, it's even more important to have a single shared view of the project that everyone can access any time they need it. If your customer is in the UK and needs a status update before their 10 a.m. meeting, you don't want to get on the phone at 3 a.m. to get them up to speed.

So how can you keep everyone on the same page about where your implementation stands, especially when you can't rely on traditional communication like phone calls and emails to share real-time information?

# Processes Your Customers Can Trust

**GUIDEcx is a software solution designed *by* implementation managers *for* implementation managers that can help you build the trust you need, whether you're in the same office or in different countries.**

## The GUIDEcx solution will help you do the following:

- **Do things quickly and predictably**

  The more examples your clients have of you delivering on-time, high-quality results, the more they will trust you. The more trust you build, the more of a buffer you have when things don't go exactly right.

- **Be transparent about your process**

  If something you ordered is late and you have no idea why, where it is, or when it will be arriving, you freak out. That's exactly how your customers feel when they don't understand where they are in the implementation process, what comes next, and why there are delays. Letting people see into the process helps them trust the process more.

- **Be easy to work with**

  Do you do what you say you will? Do clients feel safe opening up to you? Is there a frictionless way to provide feedback about processes and results? Giving clients an easy way to engage with you and making them part of the process accelerates trust and makes your clients happier. And happier customers benefit every department of your organization.

## GUIDEcx can also help you do the following:

- Identify and automate repeatable steps in your process to make them more predictable, more consistent, and faster

- Measure and optimize predictable steps to identify and resolve common bottlenecks

- Give customers a transparent view into the entire project, all in one place

- Control privacy settings so internal details stay hidden while allowing clients to see you are working hard on their project

# GUIDEcx

## GUIDEcx is the right tool
for client implementation managers in the hybrid workplace.

GUIDEcx is a purpose-built software tool designed specifically for new client implementation and onboarding. With GUIDEcx, you can not only address the most common pitfalls and complaints about the onboarding process but also overcome the specific challenges of the hybrid workplace that make implementation and onboarding even more complicated.

**Ready to see how GUIDEcx can meet your implementation and onboarding needs today and in the future?**

REQUEST A FREE TRIAL TODAY