

Customer Engagement - Best Practices

Build Efficient Projects

- Utilize templates & update these regularly based on feedback
- Set hard dependencies to engage customers in the moment when work can be completed so they don't jump ahead or complete tasks out of order
- Make the first customer task easy to complete - this helps customers learn the process
- Keep it simple
 - Are task instructions clear, concise, and actionable?
 - Do task names reflect the main action desired?
 - Have you set appropriate task durations?

Conduct Warm Handoffs

- Collaborate with sales to ensure a smooth handoff and create excitement for the customer
- Enable your sales team to speak to the investment and value of the onboarding process
- Craft an experience overview (sent with the project invite email) that sets the tone for the customer onboarding experience

Clearly Define Expectations

- Showcase GUIDEcX during the kickoff call + share the value of using this tool for mutual success
- Share the role your customers need to play + the responsibilities they will have

“View as Customer” makes it easy to impersonate a customer so you can walk them through the experience in GUIDEcX and set expectations.

Enable Successful use of GUIDEcX

- Invite your customers to the project + set customer roles to ensure you have the key stakeholders represented for project success
- Show your customers how they can add team members
- Adjust notification settings according to preferences (SMS, App, Email)
- Adjust the project view to match the needs of your customer's role
- Walk through a practice task together

Communicate via GUIDEcX

- Utilize notes / messaging to keep communication in GUIDEcX for visibility and accountability
- If customers respond outside of GUIDEcX, copy their message and respond from GUIDEcX to reinforce the correct behavior
- Leverage the PM note to keep stakeholders updated & motivated
 - User to communicate key objectives for the upcoming week or....
 - Wrap up the previous week (make sure to update regularly)

Integrations & Reporting

- Integrate into the key systems other teams rely on for updates like:
 - Slack and Teams
- Create reporting to share out on process, efficiencies, and performance
- Send CSAT surveys to collect feedback for continual process refinement + improvement