ZOOM/Five9 Internal Onboarding Process

Template

**Document History**

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| Version Number | Implemented By | Revision Date | Approved By | Approval Date | Description of Change |
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# **INTRODUCTION**

{This document introduces the process for onboarding new ZOOM/Five9 users/customers to the new platform}

# **PURPOSE**

{This document outlines the onboarding process for ZOOM/Five9}

# **ROLES AND RESPONSIBILITIES**

{Include a list of responsible teams and their roles}

|  |  |  |  |
| --- | --- | --- | --- |
| **Team** | **Roles** | **Responsibilities** | **Contact/Number** |
| Human Resource |  |  |  |
| IAM (Identity Access Management) |  |  |  |
| UC&C Team |  |  |  |
|  |  |  |  |

# **ZOOM/FIVE9 BENEFITS**

{List user/customer benefits} Sample:

|  |  |
| --- | --- |
| **Benefits** | **Explanation** |
| Improved Collaboration | Contact Center agents will be able to communicate with internal departments and specialists more seamlessly and vice versa to solve problems and unlock opportunities in real-time. |
| Enhanced Customer Experience: | End customers will benefit from a true customer engagement platform that enables them to interact with their brand of choice across channels and using rich media from voice, to chat to video, enhanced by artificial intelligence. |
| Optimized Deployments and Costs | Customers can benefit not only from fully cloud native solutions but combining UCaaS and CCaaS brings the communication stack together in a way that is more manageable, more flexible, and more efficient resulting in a quicker ability to adapt to customers and market demands. |

# **ONBOARDING PROCESS**

## **5.1 Internal Process**

|  |  |  |
| --- | --- | --- |
| **Steps** | **Process** | **Complete**  **Yes/No** |
| 1 | Create an automated welcome email that triggers when a new user/customer sign up |  |
| 2 | Schedule a follow up email to invite the new user/customer to log into the software that triggers after of inactivity |  |
| 3 | Build a greeting message for the initial login that includes a CTA to take their first action. |  |
| 4 | Design feature callouts that pop up when a user enters for the first time to help them navigate. |  |
| 5 | Create content for all campus locations |  |
| Tasks to be performed for each new customer | | |
| 1 | Schedule the first meeting between your customer success team and the new customer. |  |
| 2 | Prepare welcome packet for the new customer, filling in their specific Customer Success Team members, objectives, and due dates. |  |
| 3 | Send over the welcome packet with the due date for the Customer Intake Questionnaire. |  |
| 4 | Celebrate once a client hits an early milestone. This could come in the form of an in-app notification, handwritten note, or a small treat delivered to their office. |  |

## **5.2 Welcome Packet Template**

{Create a welcome packet template letter for both user/customer} See Appendix A

## **5.3 Onboarding Timeline Process**

{Include onboarding instructions you want the user/customer to follow} Sample:

### 5.3.1 Instructions:

* In the table below, outline the onboarding process for your new user/customer.
* In the “Date to Complete” column, include a date by which you want them to have a certain onboarding call, complete a training, finish IT setup, or use a certain feature of the service.
* Describe the activity or the content of the call in the middle column so that the user/customer understands what they need to do on or before that date.
* Set objectives so that it’s clear what successful onboarding looks like. By setting objectives, your new customers will find satisfaction in checking items off. Better yet, they’ll be interfacing with your product or service regularly as soon as they buy -- which is great for retention.
* Include length of onboarding schedule e.g. “1 week”
* Include the date range here -- e.g. “Runs from January 1, YYYY to February 13, YYYY”
* Add any important details around the cadence of onboarding calls, when the customer can expect to hear from you

### 5.3.2 Meeting Schedule/Agenda

{Include a detailed outline of what will be covered during the onboarding onboarding}

|  |  |  |
| --- | --- | --- |
| Date to Complete | Meeting/Task/Training | Objective(s) |
| Example  Jan. 9 | Example  First Onboarding Call | Example   * Meet Our Team * Go Over Onboarding Schedule * Define Onboarding Goals |
| Example  Jan. 18 | Example  Product Training Call  \*\* Please Review [This Resource](https://knowledge.hubspot.com/articles/kcs_article/account/get-started-with-hubspot-crm) Before The Call. \*\* | Example   * Create A New Contact * Review Import Process * Set Up Deal Pipeline In Settings |
| Example  Feb. 20 | Example  Import All Data From Previous System  - Note: Contact Our Support Team If You Run Into Any Challenges Along The Way! | Example   * All Data Migrated To Our Product |

# **TRAINING**

*{This section is intended to help share any important resources with the user/customer regarding training. This section explains detail on the trainings that the user/customer will have to complete,*

* Include the training due dates if applicable.
* List all Online, on-demand training required
* Be sure to link out to the resource so the user/customer can access everything they need from one centralized document.

# **HELP DOCUMENTATION**

{Include link to key setup or onboarding documentation}

# **CUSTOMER SUPPORT**

{List numbers to Customer Support to assist with the onboarding process. Include the following}

* Support Email Address: *[Insert Support email address]*
* Support Phone Number: *[Insert Support phone line and extension if applicable]*
* Support Hours: *[Insert hours, including time zone]*

# **INTEGRATION PROCESS**

{Identify how ZOOM/Five9 integration with others system will work towards automation for seamless onboarding}

# **HANDOFF EMAIL TEMPLATE**

{This section is for teams who may handoff the onboarding packet to onboarding specialists. If your team has onboarding specialists who pass on the service role to a different long-term account manager or team once onboarding is complete, consider adapting the following email [located in appendix A) to alert the customer that the onboarding period is ending.

# **OFFBOARDING PROCESS**

{Identify proper offboarding process for terminating access to ZOOM/Five9 resources. Include the following}

* Deactivate access rights and passwords
* Terminate, or reassign licenses to new users/customers
* Turn in any related equipment
* Terminate access to ZOOM voicemail (if applicable)
* Remove user/customer from email groups, distribution lists, and appropriate websites
* Backup all user/customer related data for retention including recorded Zoom meetings and voicemails.
* Follow USC policies for data, voicemails, and zoom meetings retention.
* Conduct extensive interviews to gather feedback
* Other

# **APPENDIX A: WELCOME PACKET (SAMPLE)**

Welcome Packet Template

Welcome to the *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_* customer community. We’re honored that you’ve chosen to work with us on your transition to the new ZOOM/Five9 Platform. It’s our utmost priority to ensure you have an excellent experience with our team from day one, so we’ve compiled this packet of resources to provide a framework and clear path for success in the first *[Insert onboarding time frame]* and beyond.

Inside this packet, you’ll find:

*[Delete components that are not necessary for the onboarding process and add any that applies.]*

* An introduction to our team and your points of contact
* A customer intake form (Please return this to us by *[insert due date].*)
* A timeline for our first *[Insert time frame]* months together
* Links to help documentation and other resources

# **APPENDIX B: CUSTOMER INTAKE FORM SAMPLE**

Customer Intake Questionnaire: *[Insert user/Customer Name Here]*

**Please return by *[Insert Due Date]***

Please return this form back to us by *[Insert Due Date]*. We’ll review your answers together on your first call on *[Insert Date/Time of First Call]*.

Organization Fundamentals & Contacts

1. Explain organization in several sentences. Please describe the core products or services you provide.
2. How many team members do you have?
3. Please provide a list of the key team members who you expect will be meeting with us on a regular basis and their email addresses.

Previous Setup

1. Please describe your current technology stack, mentioning any tools you use that ZOOM/Five9 will replace.
2. Will you need assistance migrating data or system settings from your previous system to ZOOM/Five9? If so, what is your budget for technical assistance?
3. If you have an in-house team that will be handling the migration, please provide the best point of contact on that team and their email address.

Expectations

1. What are you hoping to achieve by migrating to ZOOM/Five9?

# **APPENDIX C: HANDOFF EMAIL SAMPLE**

{Create a handoff email if UC&C will be transferring the service to another organization for completion}

Hi *[Insert Contact Name]*,

We've come to the end of onboarding, and it's time to transition to your long-term point of contact at *[Insert organization name]*, *[Insert name of new POC or support team]* (cc'd). *[New POC or team]* will ensure you're maximizing the value you see with *ZOOM/Five9 resources.*  They also serve as account managers and can address any account or contract questions you may have.

I've documented our work together to date, and I'd encourage you to reach out to them directly if you have any questions or topics you would like to cover. You can also contact our Customer Support team at *[Insert phone number]*.

It's been a pleasure working with you and I wish you the best!