

Onboarding Process

Process documentation and templates for the onboarding process

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Templates - Kickoff Call & SOW

Download these two templates as you prepare for onboarding a new customer

[\[TEMPLATE\] Accelerate SOW | Revver + \[CLIENT\] .xlsx](#)

[\[TEMPLATE\] Revver Onboarding Kickoff Deck - \[COMPANY\].pptx](#)

Onboarding Process Flow Map

[Accelerate Onboarding Flow Chart \(1\).jpg](#)

Salesforce dashboard to
track Strategic onboarding
customers



Strategic Onboarding Dashboard

How do I know which accounts I'm onboarding?

Notifications of new client will come through the [#sales-cs-handoff](#) channel

1. The AE will @ mention the CSM who own's the account through the sales-cs-handoff channel workflow
2. The CSM will reply in the thread of the workflow that they have scheduled a kickoff call and the date of that call
3. Track which accounts do and do not have a Kickoff call by comparing these reports on the [Strategic Onboarding Dashboard](#)
 1. Accl/Transformation Strategic Accounts
 2. Kickoff Call Scheduled

Backup Plan - In case the accounts do not come through the #sales-cs-handoff channel

1. CSM's will subscribe to receive the [Strategic Onboarding Dashboard](#) twice a week (Mon/Wed)
 1.  or type unknown
 2.  or type unknown
2. CSM's will review the dashboard for accounts in their name to ensure no accounts fall through the cracks
3. If a new account has not been sent through the #sales-cs-handoff channel, the CSM will ask the AE to submit that workflow
4. Then the CSM will do the above process in the #sales-cs-handoff channel

How do I track which accounts have a scheduled Kickoff Call?

Track which accounts do and do not have a Kickoff call by comparing these reports on the [Strategic Onboarding Dashboard](#)

1. Accl/Transformation Strategic Accounts
2. Kickoff Call Scheduled