GROW ONBOARDING CHECKLIST

ONBOARDING DEAL ASSIGNMENTS

How does Grow pitch onboarding?

We have brilliant onboarding engineers. Some are internal, some are external certified partners. Based on your use case and business, we'll match you with the best onboarding engineer. The level of service between the two onboarding types doesn't change.

Our Grow Certified Partners have the additional benefit of being business owners and experts in their industries.

Can I confirm customer fit?

Yes. Your PSM will reach out with initial info about a prospect and check with your team to ensure you have the capacity to take on a new onboarding customer.

How am I notified if an onboarding deal closes?

Two emails are triggered. The first includes account details and customer notes to your team. The second is an introduction to the customer and their team.

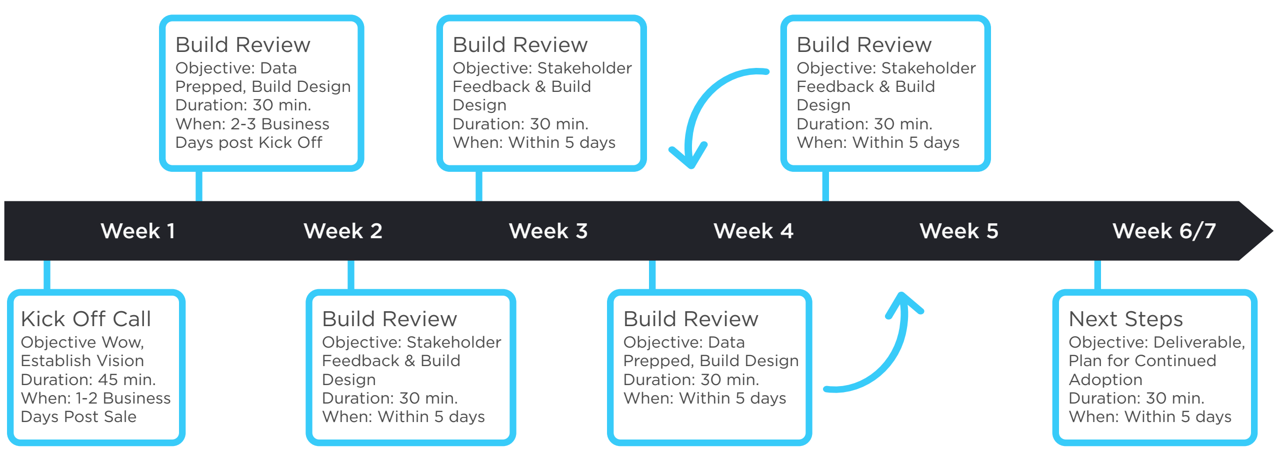
ONBOARDING STANDARD

Onboarding Basics

- 90-day onboarding including email, chat, and phone support. Support is heavily focused in the first 30 days.
- 4-6 calls at the customer's preferred cadence.
- 2-3 dashboards created (usually 15-20 custom metrics built, depending on metric complexity).
- Around 10 hours of support (including all onboarding calls).
- A complete focus on the customer's goals, building relevant metrics, and driving internal adoption.

Rally the Team:

Know whose approval you need, whether that be the CEO, department director, or team lead. Involve them throughout the proces to ensure they can approve and guide the direction of the dashboard designs.



KICKOFF CALL CHECKLIST

Call Preparation

- [ ] Schedule a call within 1-2 business days. Ensure the calendar event has relevant web conference details.
- [ ] Send a prep email with the dashboard design workbook or other engagement tool.
- [ ] Prepare for the call by learning about their company and their key data sources.

Kickoff Call Checklist

- [ ] Discover client goals & objectives
- [ ] Discuss data sources & technical needs
- [ ] Build & answer questions
- [ ] Schedule next call
- [ ] Establish next steps
- [ ] Send recap email
- [ ] Complete call documentation form

BUILD REVIEW CALL CHECKLIST

Call Preparation

- [ ] Send an email recaping the work you did between calls.
- [ ] Encourage stakeholders to be on the call and provide feedback on the direction of the builds.
- [ ] Provide value throughout, especially if a client reschedules a call. Build a metric, send a blog post or article relevent to them, etc.
- [ ] Check on their Grow activity since the last call. Are they logging in? Building? Receiving PDF reports?

Build Review Call Checklist

- [ ] Recap work completed since the last call
- [ ] Respond to any technical questions or needs they expressed on the prior call
- [ ] Apply any feedback they have for metrics and dashboards
- [ ] Offer an adoption challenge: share a PDF with a manager, set up a TV monitor, etc.
- [ ] Establish next steps/next call
- [ ] Send recap email
- [ ] Submit call documentation form

IMPLEMENTATION CRITERIA

Typically a deal is considered implemented when:

- Data sources are updating properly
- 2-3 dashboards are built out with relevant and custom metrics
- Client has expressed satisfaction with metric and dashboard build
- Adoption indicators are in place, such as PDF reports, TV monitors, and high daily activity.

Time to implementation:

Time to implementation varies by customer and is dependant on customer preparedness, data structure, and the complexity of their desired metrics.

The kickoff call is essential to outline their priorities and manage any expectations.

How do I indicate that a customer has been fully onboarded?

Complete the call documentation form. We will review and submit the service for payment. You'll be paid within 30 days after its review.