CS Operating Model - Onboarding Phase

First Impact

Deliver First Impact Quickly to Build Confidence.

First Impact refers to the moment the customer achieves tangible impact through the use and adoption of a product or service. The First Impact must be clearly defined at the beginning of the engagement and ideally goes beyond a simple login. To drive this conversation, you need to understand the various Impact a customer wants to achieve, prioritize them, and choose a “First Impact.”

Achieving First Impact will signal the end of the Onboarding phase. It does not mean that your implementation work is complete. It simply means that an initial milestone towards a larger goal is achieved.

Examples of First Impact definitions:

- Downloading a report for the first time
- Completing a task in the system

Time to First Impact is the time it takes for a customer to achieve First Impact as defined during the Business Kickoff meeting, usually measured in days. Research has shown that customers with shorter Time to First Impact are generally more successful, and their likelihood of churn is much lower than those with longer Time to First Impact.

- Define First Impact: What do they want to achieve with your product, and by what date?
- Align the implementation tasks with the desired Impact you agreed with the customer.
- Keep the customer engaged with short notification, and notify any delay regardless who or what caused it.
- Confirm if you got it right.
- Confirm via an email, that onboarding is completed.
- Do not lose the momentum, swiftly move from one action to another.
- Make sure the Onboarding Phase has a clear end and that the customer is aware of any new points of contact on the engagement.
- Update the JIP with new goals.
- Confirm First Impact is achieved.
- High churn risk!