Strategies for Effective Customer Onboarding

1. Remember Human Nature

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We’re All Human: We Depend on Habits

Asking someone to change and use a new software for work seems simple, right? Not quite!

What you’re really asking them to change is a habit. When it comes to habits, there are some psychological aspects involved that make us successfully form, continue, and change habits.

Definition of a Habit:

Environmental Cue + Behavior = Reward

When the environmental cue, expected behavior, and reward are clearly defined, a person is more likely to try, and repeat, changing their habit. Experts say it takes around 40 repetitions to form a habit that does not require much thought to repeat.

Change =	Asking to change a habit
An interruption in habit =	Resistance
Changing a habit =	Awkward

How to Address Habit Changes in Communication

Define the **cues, expected behaviors,** and **rewards**

Cue

- Manager disapproves an expense
- Office officially removes scanner from 1988

Behavior

- Employee must review policies more carefully
- Employees must use app and email submission

Reward

- Reimbursement is received faster
- Receipts are no longer missing and lost amongst paperwork and files

We're All Human: Priorities & Concerns

People are naturally wired with the same set of general priorities and concerns when faced with change.

Priorities

Status: What is the importance of this?

Certainty: Is this permanent?

Autonomy: How does this affect my work?

Relatedness: Who is in this?

Fairness: Is this fair?

Concerns

Information: Why are we doing this?

Personal: How does this affect me?

Implementation: How/when is this happening?

Outcome: Will this be worth it?

Collaboration: Who was/is involved?

Maintenance: How will I get help?

How to Address Priorities & Concerns

WHAT?

- We've invested in new software to help you and our Accountants manage your expenses more easily!

WHY?

- Processing and monthly recon issues and timelines.
- We all lose receipts.

WHEN/HOW LONG?

- Login details are coming in two weeks.
- You'll then have two weeks to transition into the new system.

WHO?

- The ELT has been looking at systems for six months.
- Pilot Group *[list names]* has tested it.
- One rep from each department is available for help beginning *[date].*

HOW does it affect you?

- It will take time to get used to!
- This will make expense entry easier and faster, you'll have an online archive, and you can get rid of paper receipts!

WHAT IF you need help?

- Use our internal support group first.
- Attend online training, use Help articles, and watch video tutorials.
- Submit a Support case.

2. Stage the Process

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The Change Process

Identify the Need

Your Team with Emburse Marketing and Sales rep

Build the Lead Team

Your Org

Gather Data, Plan the Stages

Emburse Implementation and **Your Team**

Announce the Change

Your Org

Maintain the Change

Your Org backed by Emburse Support, Training, and Customer Success Manager

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Identify the Need

Explaining why your organization is making this change will be instrumental in convincing employees that it's worth their time to learn and adapt. Start with the background.

Problem	Need
50% of submitted expenses are missing receipts.	We need something that enforces policy.
No one can remember European mileage rates.	We need something that stores mileage rates.
We have three forms to fill out for approval notes and processing information.	We need something with built-in approval that eliminates paper.
We have consistent questionable spend on Las Vegas vendors.	We need something that requires details and reviews policy violations.

How to Build the Team, Gather Data, Announce, and Maintain

Preparation for the implementation and rollout process is key. This involves people, data, communication, and a support plan.

Build the Team: Include an executive whose assistant submits on her behalf, an infrequent traveler, a frequent traveler, an approver, and a secretary/AP representative/accountant.

Gather Data: Agree on a timeline that the team can commit to. Assign roles, such as "Policy Definer," "Receipt/Scenario Gatherer," "Configuration Point Person," and "Main Tester 1," etc.

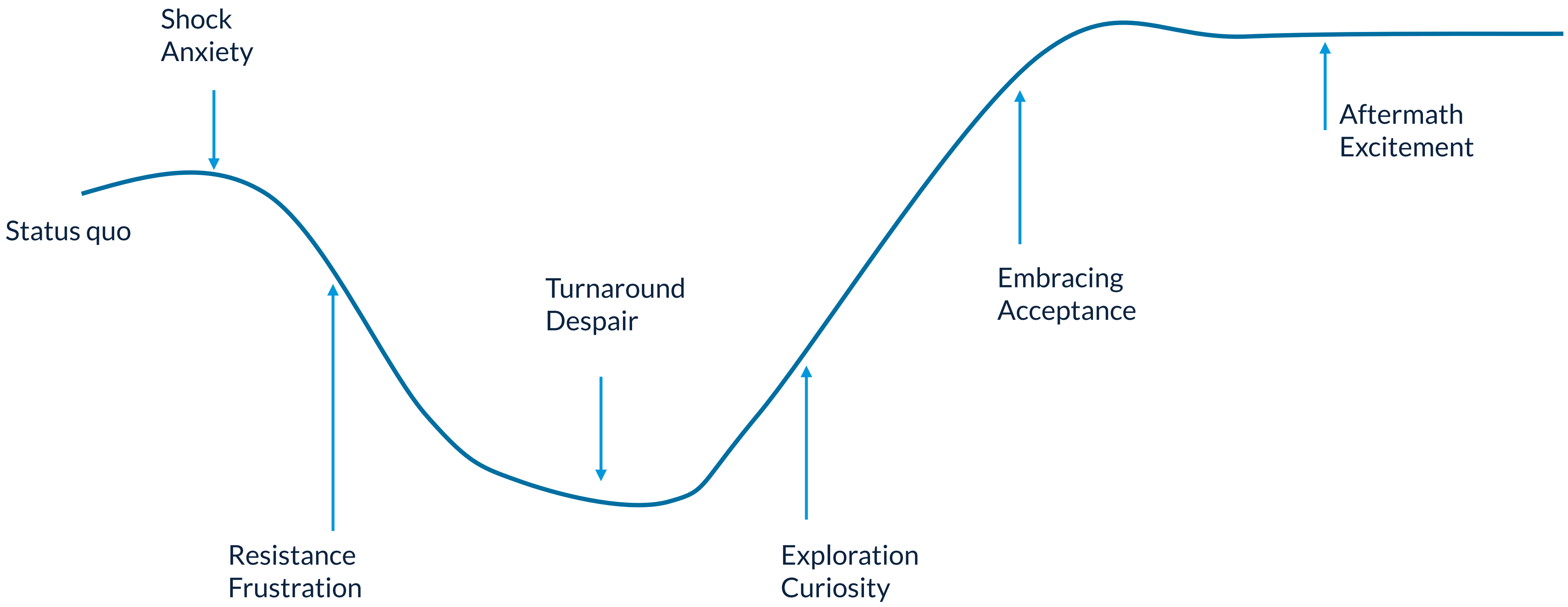
Announce the Change: Include all the background information. Address the priorities and concerns. Lay out what everything looks like for the next three to six months.

Maintain the Change: Set policy limits and stick to them. Ensure Support resources are communicated. Continually check in to keep the pace.

3. Anticipate the Change Curve

The Natural Change Curve

Your new investment may ultimately be a great thing, but we're all human. Most people will go through these stages – some quickly, some slowly. Some will inevitably get stuck at different points.



The Three Responders

Remember these groups when sending any communication and building the support plan. All three can be found at every organization.

Conservers

Cautious

Need the details and time

Ask questions

Originators

Comfortable with challenge

Innovative

Pragmatists

Mediators

Practical but non-committal

Change needs to serve a function

Getting Through the Change Curve

Keep the communication frequent, detailed, and positive. Provide all the plan details so that employees will trust that this is a good, well-thought-out change and they have been personally considered. Let them know all the ways in which they can receive support and how to voice their thoughts.

"Recurring info sessions will take place in Room A every Wednesday in April."

"Managers will be reviewing the new system and processes in your team meetings next week."

"Please post questions and concerns on our intranet page. We will keep the Q&A section updated."

"Expense a coffee or drink up to $5 during the month of April and let's celebrate!"

4. Prepare for Resistance

Why Does Change Fail?

Change often fails when employees cannot make sense of it. Explain why this new system makes sense for your organization and its goals in a relatable way.

- Implementing the change too late
- The solution doesn’t meet the goal
- Underestimating the amount of resistance
- Communicating the change ineffectively

- Driving the change too quickly/forcefully
- Not providing enough training to fully implement the change
- Misaligning the change with elements in the company structure or culture

How to Handle Resistance

Hear Them Out

"Ann doesn't have a smartphone. She's frustrated because we only talk about the app."

"John doesn't know who he reports to, so he refuses to submit anything."

Validate Them

"There is a learning curve for sure. We've assembled a team you can contact for help."

"You are not expected to be an expert. Just try your best and we'll help."

Be Firm with a Little Flexibility

Allow a period for users to explore the new system while still using the old system.

Advocate for support and training to alleviate misdirected frustration and encourage correct usage.

Keep Things Relatable

"The system is new, but we kept all of the policies the same."

5. Communicate

The Announcements

A major factor in successful change management is the communication. Remember the *who, what, where, when, why,* and *how* from grade school? These also indirectly address **Priorities** and **Concerns**. Too much information is better than not enough when persuading people to change.

- Build Up to It
- Name the Key Players
- Connect to the Company
- Introduce the Solution
- Detail the Desired Outcome
- Explain What's Next

Communication Examples

January 30, 2021: At the beginning of Q2, we will be launching a new expense management software! More info to come.

February 12, 2021: *[Name, title], [Name, title],* and *[Name, title]* are excited to launch *[product name],* an online expense management system that will automate the whole expense process, keep archives, and offer mobile capability. More info to come.

March 5, 2021: Look out for login credentials between April 1-2. With our rapid growth, it is imperative that we move from a manual process to something easier and online. You'll be reimbursed more quickly, managers can check policy compliance more easily, and everyone will have much more visibility into the whole process, from workflow stages to missing required details.

April 5, 2021: Now that login credentials have been sent, please attend training before April 30. At that time, all employees must be using *[product name]* going forward. Find Support and Help resources here: *[contact info].*

6. Keep the Momentum

Implement & Maintain

As the launch date approaches, it's important to make sure that the team driving the change stays engaged leading up to, and well after, the big day.

- Identify a clear date for the switch.
- Celebrate with something significant.
- Create positivity.
- Measure progress.

- Adjust as necessary.
- Silence the critics.
- Give the neutrals something to connect to.

Tips for Maintaining Momentum Before and After Go-Live

Hold a celebration, keep management accountable for their own teams, review analytics, adjust as you go, and use in-app automation and tools to help users adopt the change.

Do something celebratory—like a gift card raffle or a company-sponsored happy hour—after the first successful month.

Hold monthly management progress meetings for the first three months.

Use Analytics to adjust policy limits according to spend and submission patterns.

Check up on your approvers – are they thoroughly reviewing and asking questions?

Utilize system notifications for consistent reminders to set up the expected behavior.

7. Use Your Emburse Team

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The Change Process

Customer Success Manager

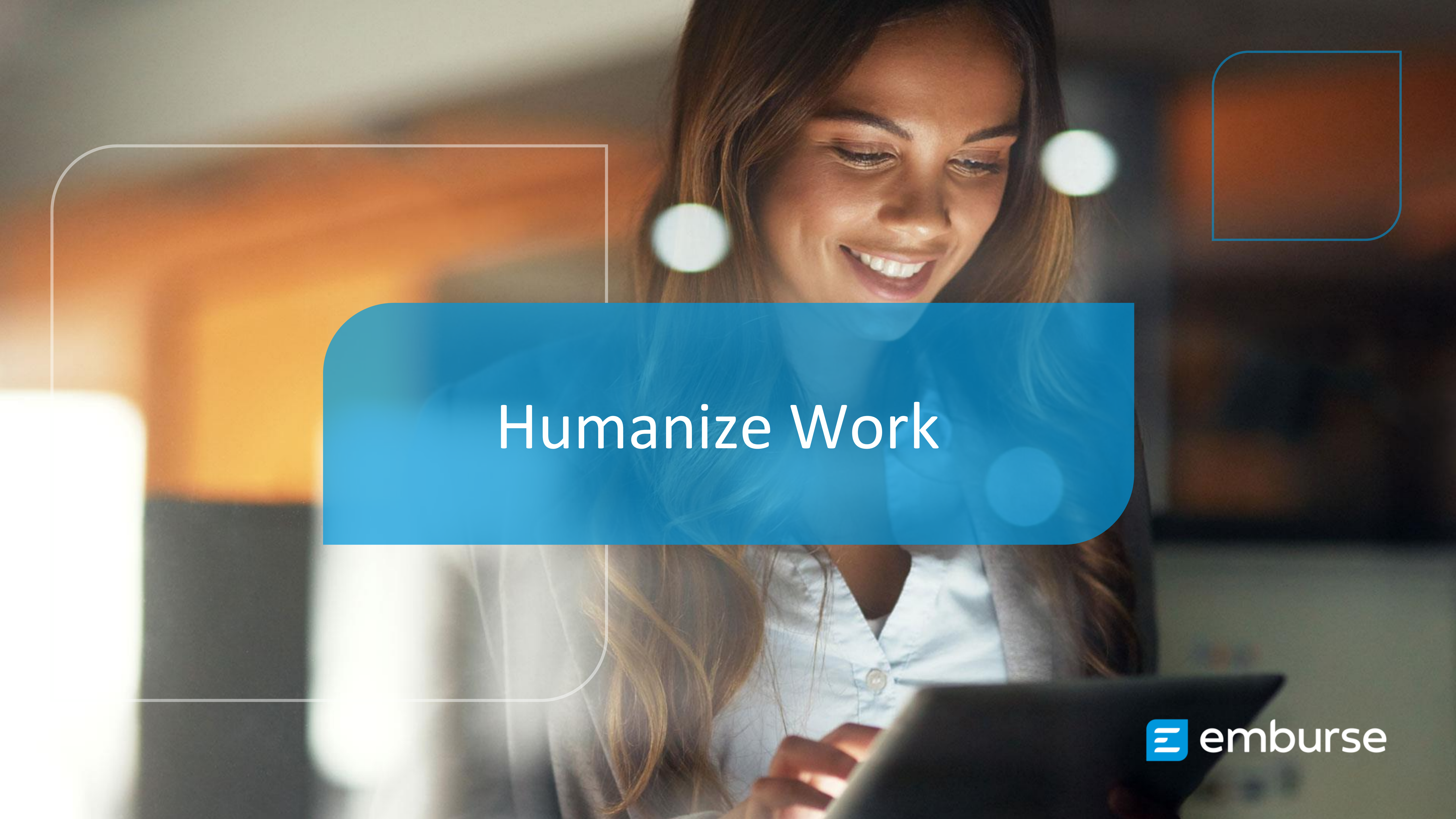
- Your consultant and advocate
- Offers personal account knowledge
- Identifies best practices and helps you plan
- Shares their portfolio experience

Support Team

- Always at-the-ready for questions
- Able to log in right with you
- The first to know about any technical issues, workarounds, and common user errors
- Takes all the standard user questions off your plate

Training Camp

- Scheduled and available as many times as needed
- Includes best practices and common examples
- Attendance reports available
- Always up-to-date with product enhancements


Humanize Work
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You know your employees better than anyone. Planning for effective change management within your organization ensures your long-term success with our products.

Keep in mind, we're all human. Together, we can humanize work!