

WORKPLACE SAAS ONBOARDING & ADOPTION ENABLEMENT

Functional Focus:

SaaS Onboarding & Adoption Enablement

Overview

Managed customer-facing implementation communications and onboarding resources in partnership with Service Delivery. Served as the liaison between customers and internal teams for onboarding communications, implementation expectations, and transition to ongoing support. Connected workplace SaaS implementation milestones with the information and resources customers needed before, during, and after launch. Coordinated contributions from Service Delivery, Product, Platform Architecture, and Marketing to create a clearer, more consistent onboarding experience across overlapping customer rollouts.

Project Scope

7-12

Customer onboardings supported quarterly

Multiple

Concurrent rollouts

Pre-launch → ongoing use

Implementation support span

Customer Onboarding & Adoption Framework



Implementation Challenge

Onboarding information came from several functions and appeared across multiple customer touchpoints throughout the project.

The challenge was to turn those inputs into one coordinated path so expectations, education, and follow-up remained connected to the rollout.

ONBOARDING SUPPORT ACROSS THE CUSTOMER LIFECYCLE

01

Prepare

Set expectations and organized customer next steps through checklists and journey guidance.

02

Onboard

Sequenced customer messages, training content, and product tours around implementation milestones.

03

Transition

Maintained continuity as customers moved from active onboarding into ongoing support.

04

Adopt & Improve

Reviewed usage patterns, refined resources, and surfaced friction points to Product and Platform Architecture teams.

CROSS-FUNCTIONAL DELIVERY

Gathered and reconciled input from Service Delivery, Product, Platform Architecture, and Marketing through structured reviews and feedback loops, keeping customer guidance accurate and connected to implementation priorities.

Service Delivery

Product

Platform Architecture

Marketing

OUTCOMES

Approximately 25% Shorter Onboarding Time

Combined workflow and resource improvements contributed to a measurable reduction in onboarding time.

Greater Delivery Consistency

Customers received a clearer sequence of expectations, education, and support across multiple engagements.

Feedback Put into Action

User insights informed documentation updates, customer touchpoints, and platform-experience improvements.