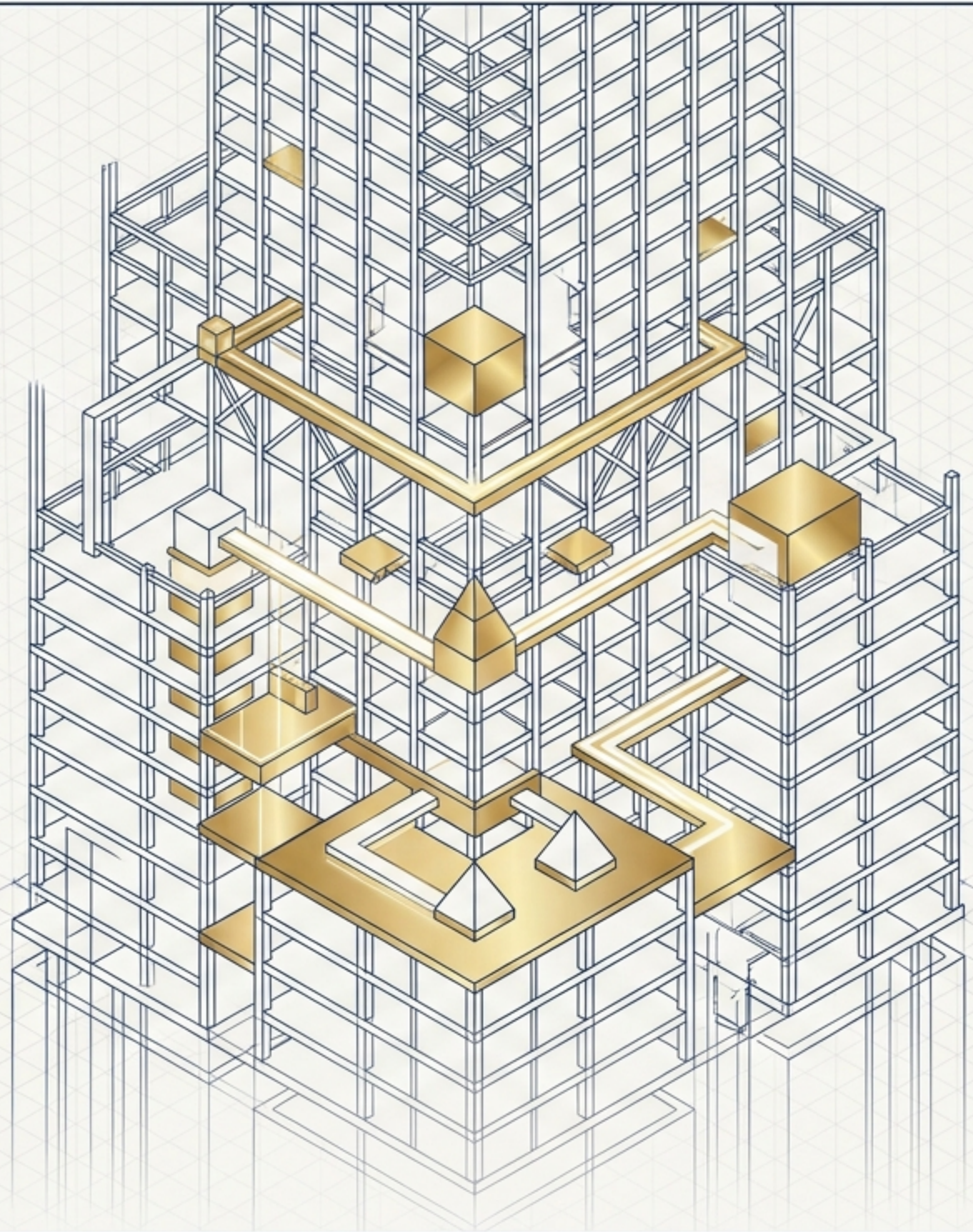


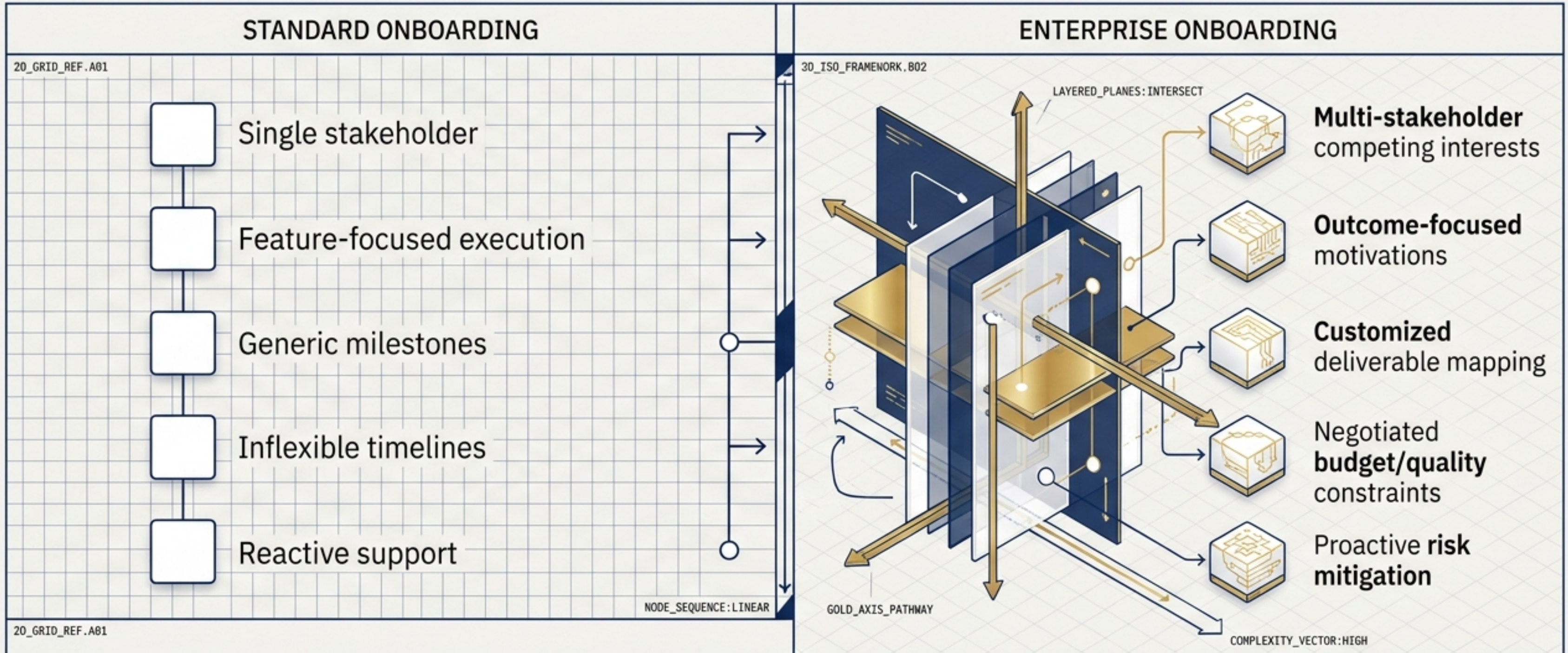
Architecting Enterprise Onboarding

A Strategic Blueprint for Large Client Deployments

A structured methodology for reducing time-to-value and engineering long-term partnerships.

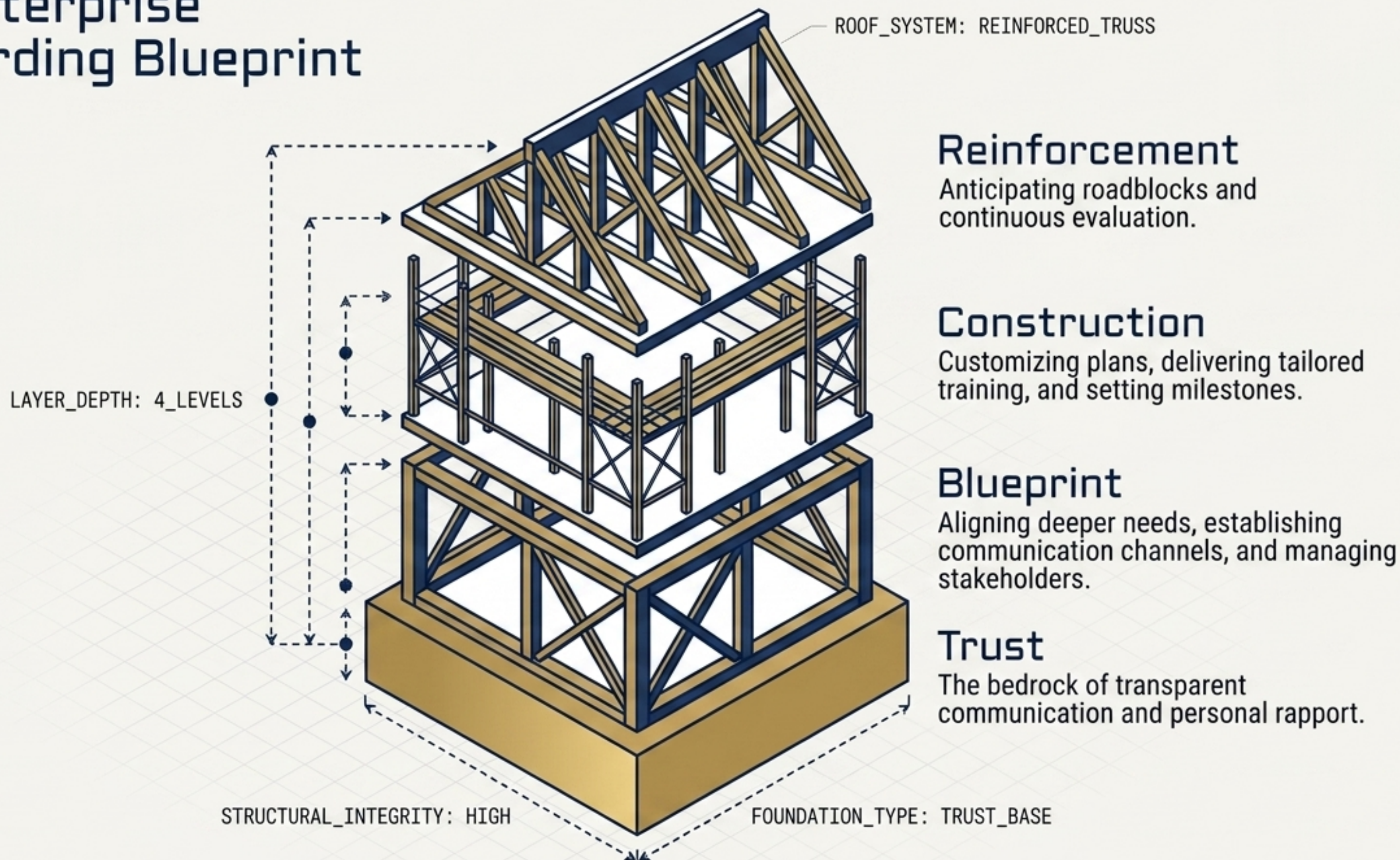


The Enterprise Complexity Gap

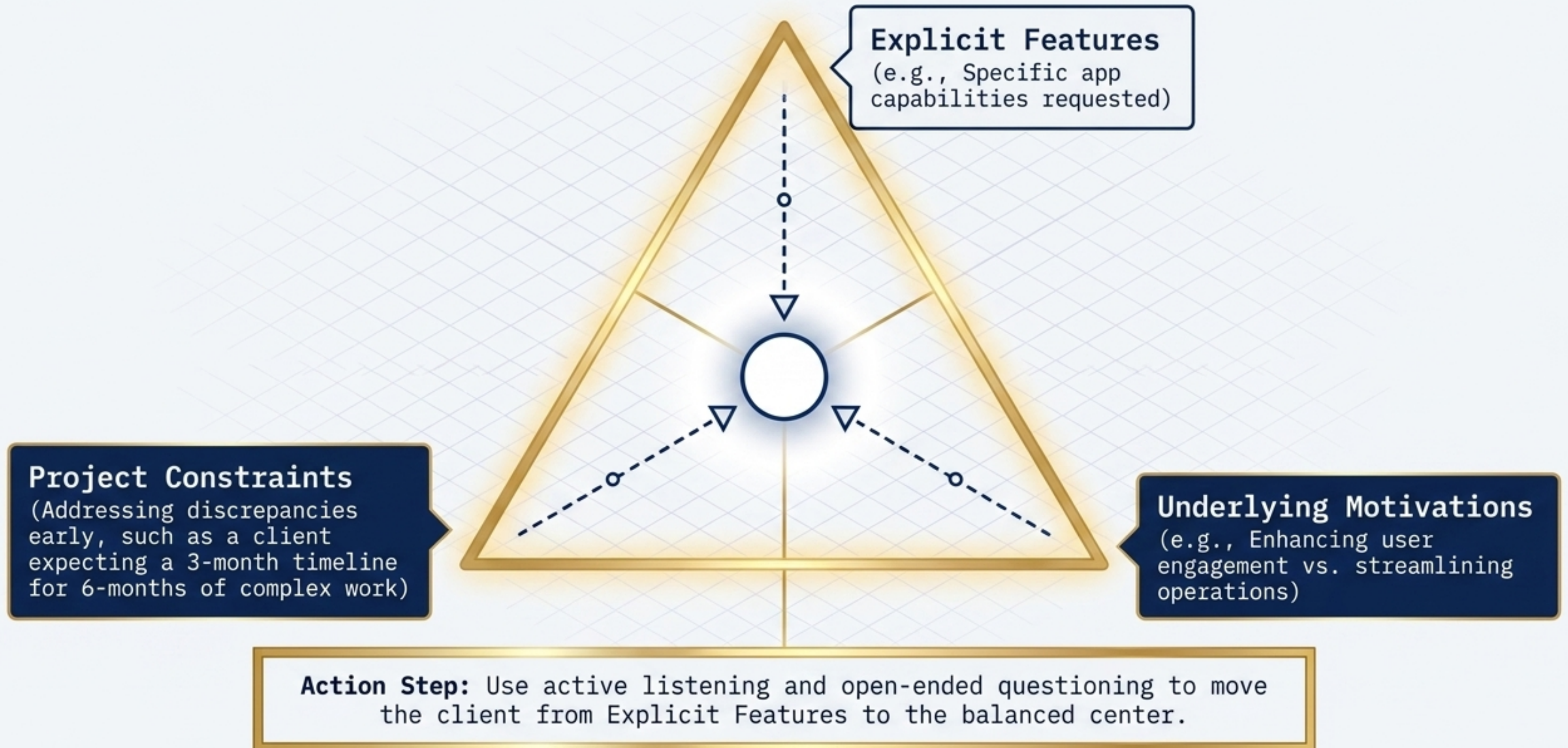


Large client onboarding is not a linear checklist—it requires a custom architectural blueprint.

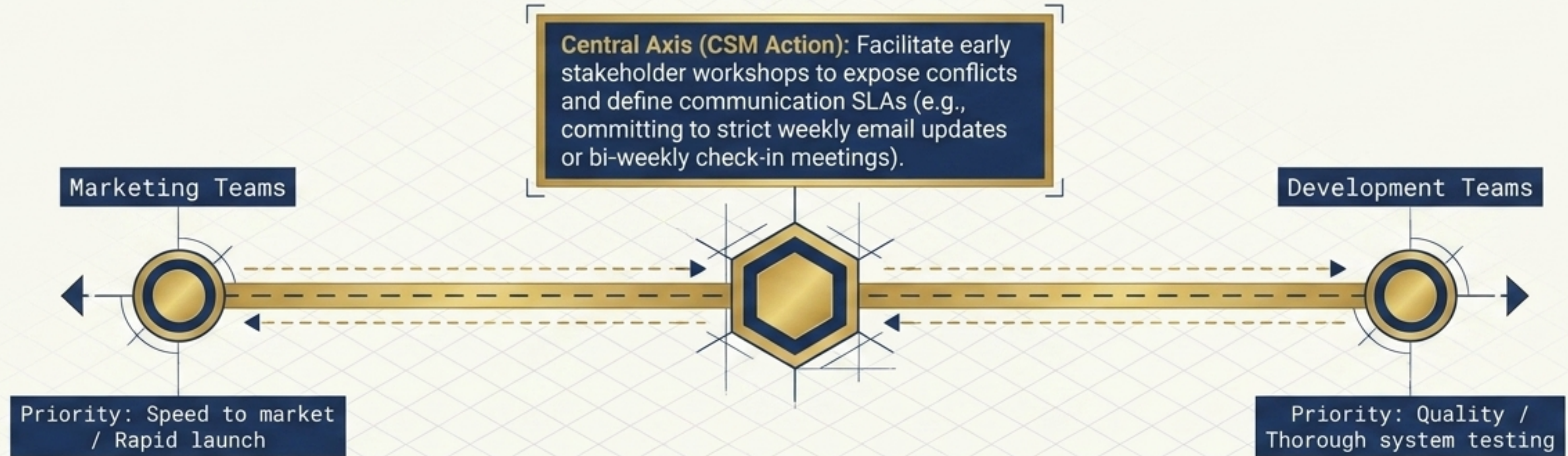
The Enterprise Onboarding Blueprint



Diagnosing Deep Requirements



Mediating Stakeholder Factions



Architecting the Custom Path

Path A: Net-New Users

Focus: Fundamental tutorials, basic navigation, user guides.

Deliverable: Project kick-off in Week 1.

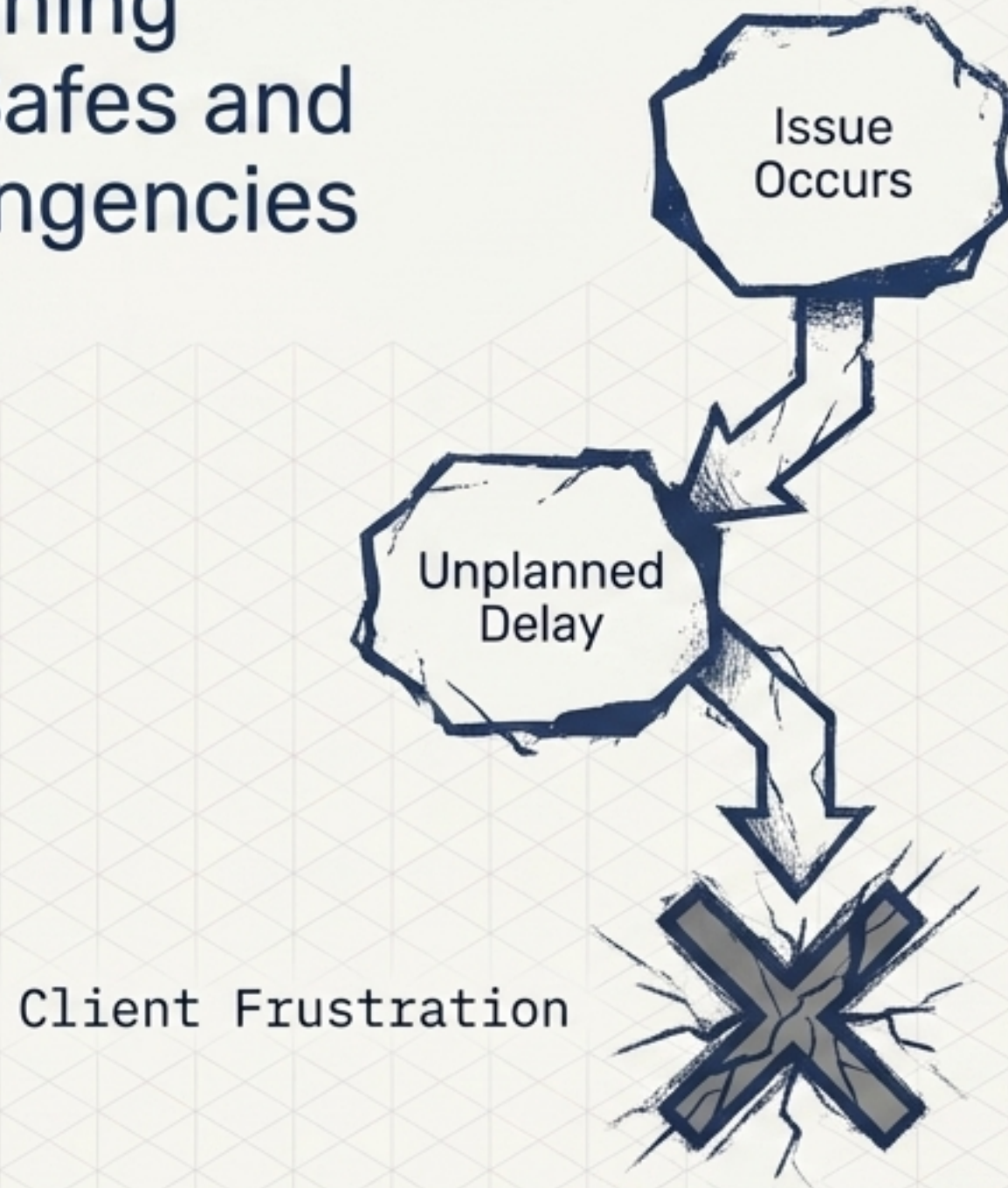
Path B: Experienced Users

Focus: Advanced CRM reporting features, legacy system integration.

Deliverable: Early wireframes and prototypes at set intervals.

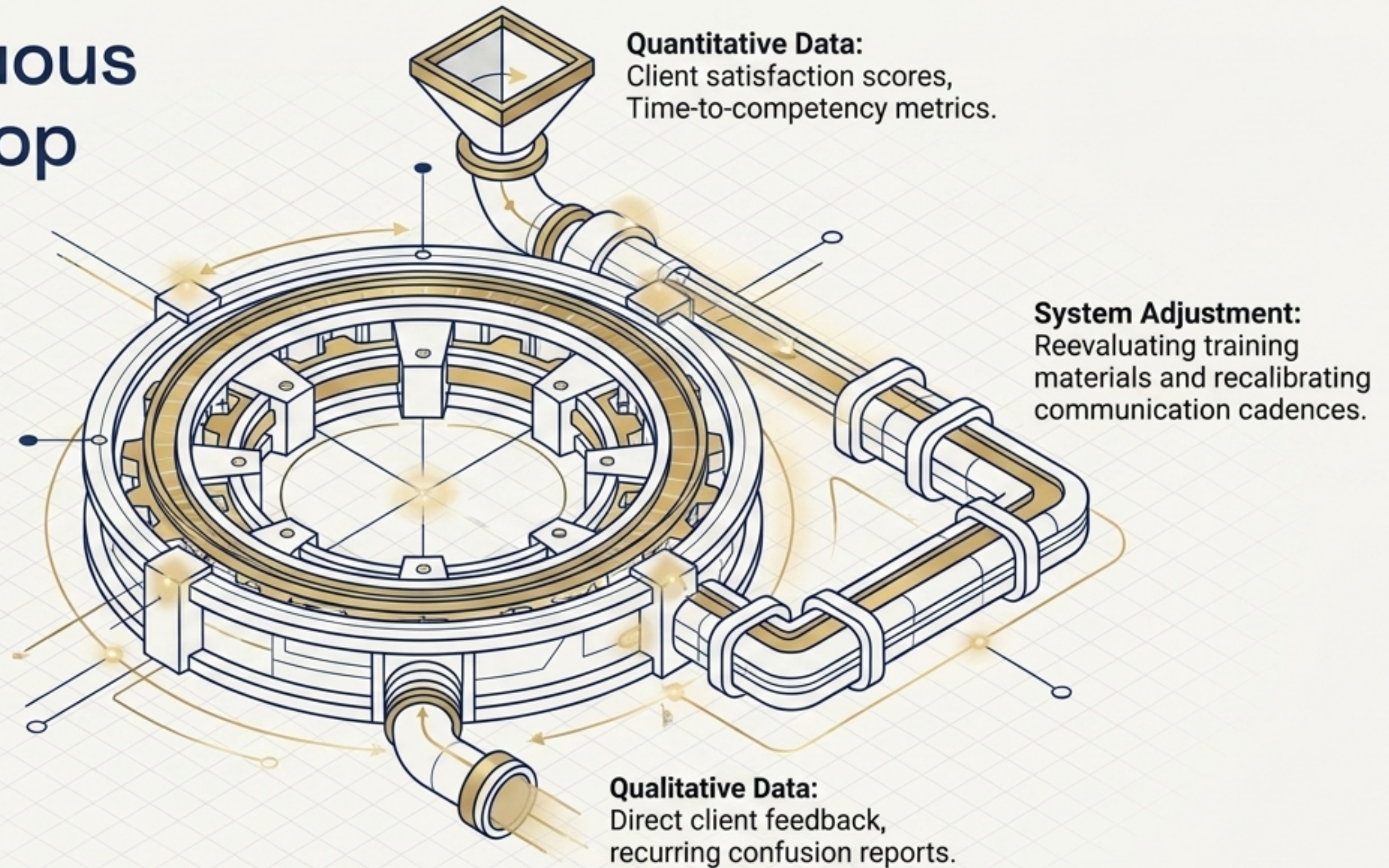
Support Anchor: Both paths require an ongoing helpdesk and a self-serve FAQ repository for sustained support beyond initial training.

Designing Fail-Safes and Contingencies



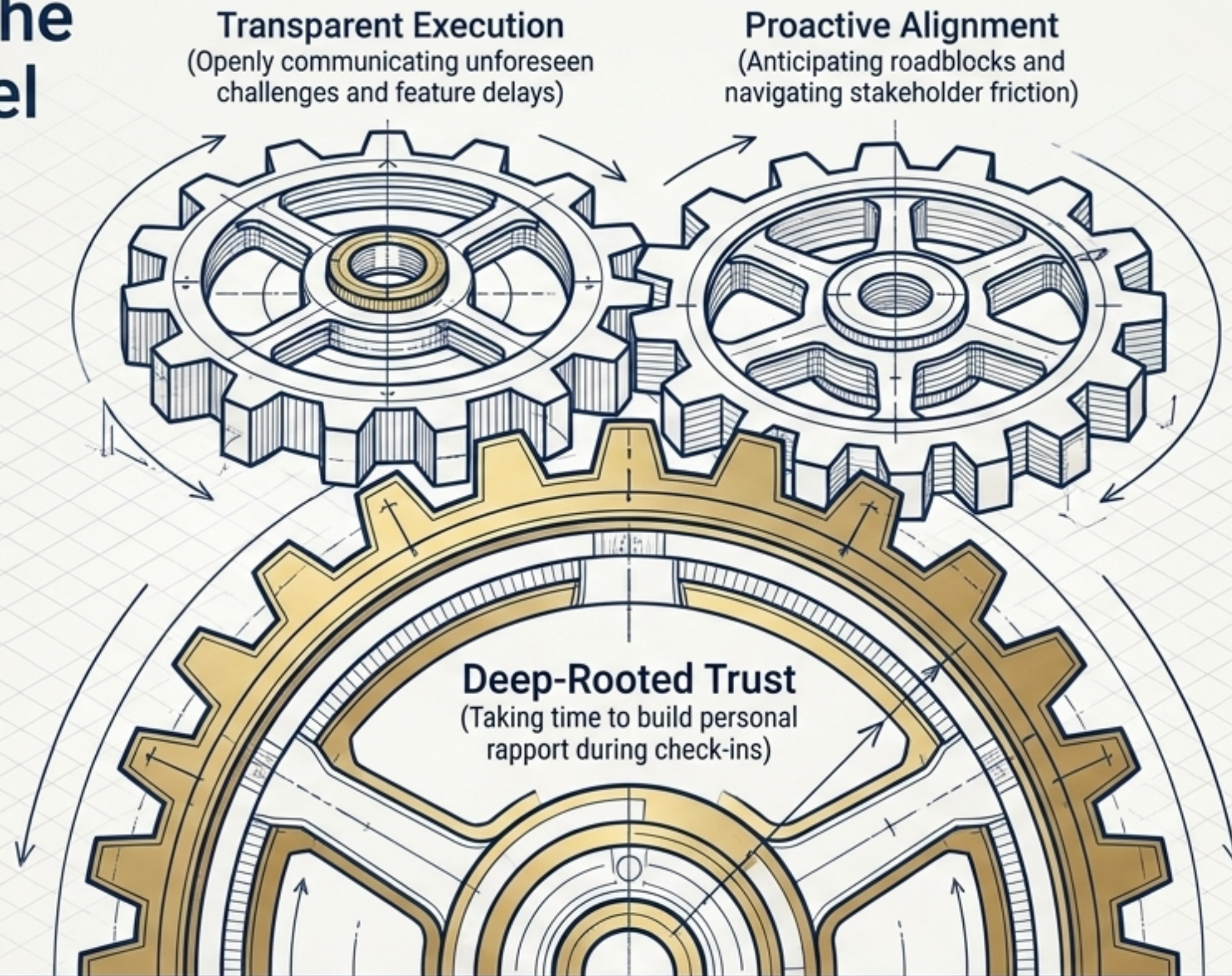
Takeaway: Anticipation mitigates impact. Analyze past enterprise failures to build current contingencies.

The Continuous Iteration Loop



Takeaway: Enterprise onboarding is not a static manual; it is a dynamic process requiring periodic reviews to track progress over time.

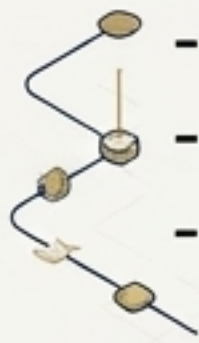
Engineering the Trust Flywheel



Synthesis Statement: Trust is the inevitable output of transparency and competence. It transforms the CSM from a mere vendor into a trusted advisor, securing long-term enterprise loyalty.

The Master Architect's Checklist

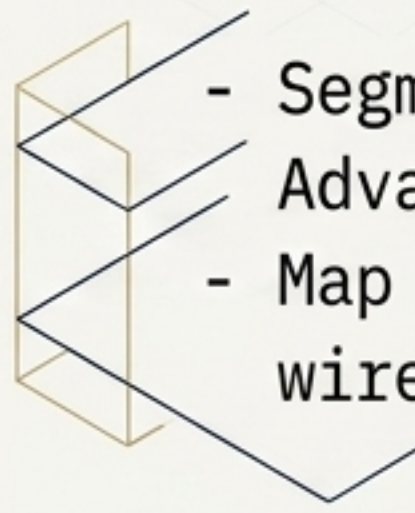
Alignment

- 
- Uncover underlying motives
 - Define budget/timeline constraints
 - Set communication SLAs

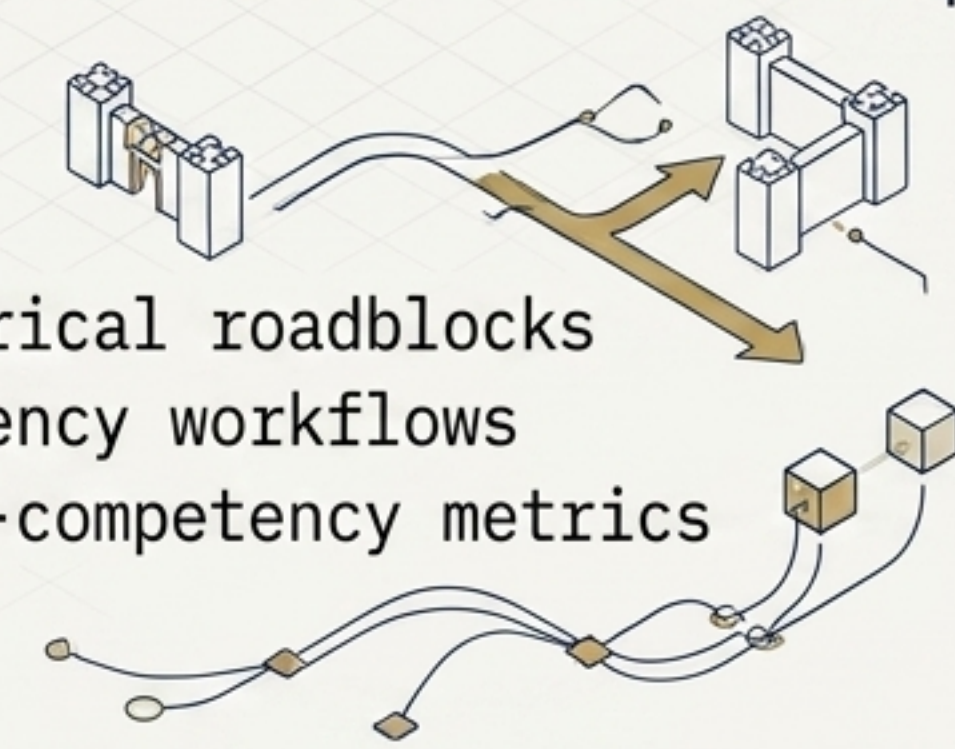
Stakeholders

- 
- Map competing priorities (Speed vs. Quality)
 - Run early alignment workshops

Customization

- 
- Segment training (Net-new vs. Advanced)
 - Map out Week 1 kick-offs and wireframe intervals

Resilience

- 
- Analyze historical roadblocks
 - Build contingency workflows
 - Track time-to-competency metrics

Constructing outcomes, not just delivering features.