Customer Onboarding Process

A guideline to getting started with Skynamo now that you're a customer.
Getting you set up with the software to create transparency in your business and turn data into knowledge, helping your business get smarter about sales.

CLIENT — SKYNAMO

Phase 1

ACQUISITIONS (<1 week)

The duration of this phase depends on client availability for a handover detail discussion, and how soon the signed contract reaches our Accounts dept.

1.1. Signed contract
Forward the completed contract to our sales representative, so that the handover to our Success Team can be started.

1.1. Signed contract
When the signed contract is received, our accounting team will issue an invoice for all once-off billing, including the set-up fee. If you are paying on a monthly basis your recurring billing will be invoiced on the 1st of each month. If you are paying annually upfront, your invoice for the license fees will be billed along with your once-off fees

1.2. Complete Client Profile
We will then arrange a handover details call during which we complete the client profile together.

TIP: For the most comprehensive set-up possible, choose a Skynamo champion to maintain harmony between Skynamo and your business.

1.3. Book a Setup Discussion
A questionnaire will be completed together by your Skynamo champion and our setup specialist.

1.4. Confirm Payment
Once settled, a payment confirmation document must be sent so that the handover to our Success Team can be started.

Phase 2

CUSTOMER SUCCESS (CS) (1-6 weeks)*
The duration of this phase will be determined by our service level agreement (SLA), and how co-operative you are in providing us the necessary data!

2.1 Introductory Setup Discussion and Overview
This is the start of our Customer success journey where we will discuss how to best utilise Skynamo as a business tool. An hour long Implementation Discussion will prepare you, and then take you through the setup conversation.

2.2. Setup Summary
This will be sent to cover the discussion.

2.3. Data
At this stage we require your relevant company data to be supplied to our team.

2.4. Data Check
Once the data has been imported, configuration details are sent to our support team. (No integration = two week setup)

NB: INTEGRATION SLA: In some instances Integration may be required. If either Dropbox or standard integration is selected, setup will take four weeks. If there's a need for more advanced integration, the setup could potentially be a bit longer, depending on the complexity.

2.5. Arrange Training
During the setup process you may start booking your team for training.

2.6. Implementation

2.7 Credentials Issued
Login credentials will be provided.

Go-live

Phase 3

MONITORING (8 weeks)*
After the go-live, your Skynamo account will be monitored for a period of 8 weeks with regular health checks.

3.1. Introductory Discussion

3.2 Health Checks
3 health checks over the monitoring period will be conducted to ensure everything is on track.

Phase 4

KEY ACCOUNT MANAGEMENT (Ongoing)
After 2 months, when we are happy that our tool has proved itself to be efficient in your business, you will be introduced to your own dedicated Key Account Manager (KAM). Your KAM guarantees ongoing access to support, analytics and integration teams.

Now that you understand the process, we can't wait to get started!
*All timing guidelines are an indication only.

Get in touch.
+27 (0)861 345 345
www.skynamo.com