

Onboarding an Enterprise Customer at Writesonic

Step 1: Conduct an Agreement Review with the Legal Team

To initiate the onboarding process for an enterprise customer at Writesonic, it is vital to conduct a comprehensive agreement review with the legal team. This involves:

- Collaborating with the legal department to ensure that all terms and conditions align with the customer's requirements and company standards.
- Reviewing the contract thoroughly to address any legal concerns and ensure compliance with regulatory standards.
- Seeking approval from the legal team before proceeding to the next steps of the onboarding process.

Step 2: Perform a Security Review with the IT Department

Following the agreement review, it is essential to perform a thorough security review with the IT department. This includes:

- Engaging the IT team to assess the security implications of onboarding the enterprise customer, particularly concerning data privacy and protection.
- If applicable, conducting a comprehensive review of the customer's requirements and identify any integration needs where professional services needs to be engaged. This is typically identified during the sales cycle, but it needs sign off from IT.
- Addressing any security concerns and ensuring that the IT department approves the project from a security standpoint.

Step 3: Sign the Agreement Using PandaDoc

Once the agreement and security reviews are completed and approved, the next step is to sign the agreement using PandaDoc. This involves:

- Sending the agreement to the customer for review and electronic signature, ensuring a seamless and efficient signing process.
- Make sure there is alignment with the customer's onboarding timeline.

Step 4: Send a Welcome Email to the Customer Introducing Them to the Customer Success Team

After the agreement is successfully signed, the customer will receive a warm welcome email to introduce them to the customer success team. This includes:

- Introducing the customer to the dedicated customer success team members who will be overseeing the onboarding process.
- Providing an overview of the onboarding timeline and key milestones to set clear expectations for the customer.
- Encouraging the customer to reach out for any assistance or clarification, establishing open lines of communication from the outset.

Step 5: The Customer Success Team Arranges a Call with the Customer to Initiate the Onboarding Process

Following the welcome email, the customer success team arranges a personalized call with the enterprise customer to kickstart the onboarding process. This involves:

- Scheduling a convenient time for the call based on the customer's availability and time zone.
- Conducting a comprehensive onboarding discussion, including introductions, onboarding objectives, and a walkthrough of the next steps.
- Addressing any initial queries or concerns from the customer to ensure a smooth transition into the onboarding journey.

This step-by-step process ensures a seamless and structured onboarding experience for enterprise customers at Writesonic, setting the stage for a successful and collaborative partnership.