

Meet your Customer Engagement Manager Onboarding Experience



Meet Your Customer Engagement Manager

I'm **Leah Grassie**, your dedicated TechInsights Platform Client Engagement Manager.

I'm here for you to discuss onboarding, training, platform features and anything else you might need to get the most out of your subscription.

If you want to book a meeting or chat, please send me request using the button below.

You can also email me:
lgrassie@techinsights.com

I look forward to working with you!

 Book a Meeting With Leah

 Remind Me Later

Introduction:

1. New Feature in planning for development
2. Started Christie our VP of Customer Success earlier this year
3. Christie asked if Design could help develop the idea connect CEM's with customers
4. We collaborated on this new "Meet Your CEM" feature

What is it?

1. What does this do?
2. Introduces customers to the specific CEM assigned to work with them
3. Provides in-platform tools for customers to directly book CEM consultations

Why is this important?

1. Our customers want to find insights and value in our content and our CEM's are able to help customers to find what they are looking for.
2. Our CEM team really helps customers find DEEP VALUE in our content

How does this contribute to our Strategic Objectives & Priorities?

1. We know that customers who find significant value in our content renew and expand their subscriptions and this improves our quality and growth of revenue.
2. The new tools will help to make this consultation process easier and repeatable, so we can connect with and help more clients
3. Developing value through Customer Success is really important and this makes the feature quite a high priority as we add more and more user to the platform

Finish

1. Hope that gives insights on what design in our org is right now
2. As I mentioned this is not yet in development (soon)
3. If you have any questions, about this material reach out to me

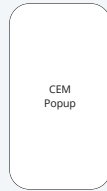


High Priority !





4.13.1.1. CEM Popup



Required CEM:

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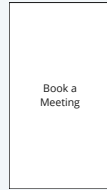
Required CEM:

Template:

- Why?**
- Worst question in customer survey was: "Who do I go to for help?"
 - This will directly address it

- Integration:**
- For Meetings:**
- Outlook Meeting
 - Zoom
 - Outlook 365 (Teams?)
- Mailings:**
- Facebook (social)
 - Google

4.13.1.2. Meeting Request



CEM Start:

Select Appointment:

Find a Date & Time:

Confirmation:

Send SMS & Email message reminders

Part of email messages
Need to manage in Notification Preferences in device app
Can also send to self (for CEM's)

This is UI but also UX

4.13.1.3. What will trigger the CEM dialogue?

Support Interaction

CEM - system message

"White Glove" Services

High priority

White Glove Services

High priority

Add 45 day email

45 days after last login

45 days after last login

Define initial experience:

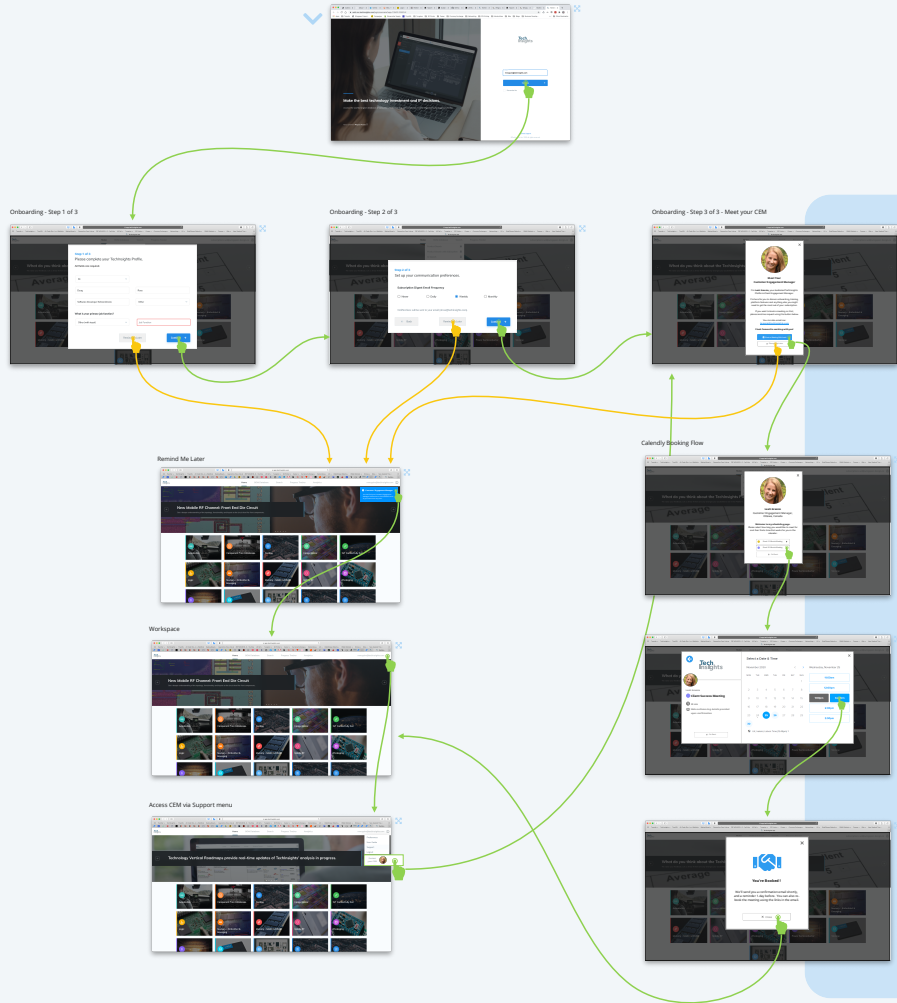
1. On First Login
2. Switch to Second Login
3. Banned new users on 1st Day Check in?
4. Banned dormant users after login 30 days?
5. Send 45 day initial reminder
6. Trigger on CEM change, new CEM, regional CEM

Show in help menus.
Show new/old platforms

NO interruption on SHARE link
We should not be trying to onboard users not actively seeking to be part of platform)
Respect users' context & privacy

Basic Experience View





This is UX!

