



Step 1 - The Kickoff Call

Published on 07/20/2017

We are excited to welcome you as the newest member of the inMotion family! The Customer Success Team is eager to guide you through The Onboarding Experience. Our **proven 5-step process** is designed to deliver a successful onboarding and training program aimed to facilitate higher productivity, optimize processes and keep the focus on your creative work!

Overview

Our **primary goal** during this exciting first step is to transition you from your Sales representative to your Customer Success representative and begin the inMotion onboarding process. Your Customer Success representative has been briefed by our Sales team, but will use the time on this call to gather more details on your specific goals with inMotion.

During the kickoff call, our objective is to gain a thorough understanding of your workflow processing needs and **overall desired outcome** so our expert Customer Success representative can assist you as you optimize your inMotion account.

Customer Prerequisites

- Familiarize stakeholders with the [Onboarding Experience](http://guide.inmotionnow.com/help/ra-onboarding-experience)
(<http://guide.inmotionnow.com/help/ra-onboarding-experience>)
- Review the [Onboarding Prep Guide](http://guide.inmotionnow.com/help/ra-onboarding-prep-guide) (<http://guide.inmotionnow.com/help/ra-onboarding-prep-guide>)

Kickoff Call Agenda

- **Overview** (5 min)
 - Introduce Team Members
 - Review Agenda
- **Goals** (10 min)
 - Recap with Sales



- Discuss Your Current Process
- Review Goals & Desired Outcome
- **Next Steps** (15 min)
 - Discuss Onboarding Schedule
 - Review Account Setup Checklist & Self-Paced Learning Guides

inMotionNow Responsibilities

- Discuss and review customer **goals**, **process**, and **timeline** during kickoff call

Next Steps!

- Complete [User and Contact Worksheet](http://guide.inmotionnow.com/help/ra-user-contact-worksheet) (<http://guide.inmotionnow.com/help/ra-user-contact-worksheet>)
- Provide additional items from the [Account Setup Checklist](http://guide.inmotionnow.com/help/ra-account-setup-checklist) (<http://guide.inmotionnow.com/help/ra-account-setup-checklist>)
- Move on to [Step 2 - Account Setup](http://guide.inmotionnow.com/help/ra-account-setup) (<http://guide.inmotionnow.com/help/ra-account-setup>)