

So you signed your contract...now what?

What is a CSL?

Clients will be assigned one dedicated platform specialist, known as a Client Success Lead (CSL). Your CSL will work with your team leaders to facilitate the creation of your Cadence platform, training of account holders, and the rollout of texting communication. To ensure success, full Cadence implementation should be completed in no more than six weeks.

Post-implementation, your CSL will support Cadence account holders to foster sustained satisfaction and success in the platform. Your CSL will serve as your chief collaborator, advocate, and problem-solver for all things texting throughout the duration of our partnership.



Who should be a Team Lead?

- › Team Lead is a primary contact for the CSL and is expected to take a leadership role during the onboarding process
- › Team Lead would be granted ADMIN-level access to the platform - the highest level access
- › Team Lead is the first person to be given a Cadence account and complete Cadence training
- › Team Lead should be keen on collaboration, highly communicative, responsive, organized, and able to devote the time and/or resources to launch this initiative
- › Team Lead may be in a supervisory role, or may be tasked with overseeing the Cadence usage of other staff members at your institution
- › Team Lead should have demonstrated proficiency in an institution's system of record and how data is collected/stored
- › Team Lead should have a fundamental understanding of how to create/export files (Microsoft Excel, Google Sheets, CSV)
- › Team Lead should strategically offer insight and guidance into an office's existing communication flow and understands the needs of your target constituencies
- › Team Lead must have willingness to learn/use new technologies

Who?

You will be introduced to your CSL by your Sales Director via email and provided with a meeting link to schedule your introductory call within 5-7 business days.

What?

To set your team up for success, your Team Lead(s) should be identified prior to the scheduling of your introductory call. The purpose of this call is to discuss your texting goals and objectives, determine your projected timeline, and discuss what training/implementation will consist of. All Cadence account holders are not required to attend.

Where?

45 minute conference call via Zoom

When?

Ideally, the introductory call should be executed no later than 14 business days from your signing date.

Why?

The Cadence onboarding process is designed to ensure your ultimate success through direct guidance and support by texting professionals. While Cadence is a very user-friendly tool, our clients benefit immensely from our recommended, industry-proven insights and best practices.

How?

Estimated Onboarding Timeline:

