



Best Practices for Onboarding, Ongoing Adoption, and Sustained Engagement

Onboarding New Users

- 1. Total Expert onboarding journey:**
Leverage the Total Expert Onboarding journey to continue to drive adoption beyond implementation.
- 2. Leverage pre-recorded trainings:**
Use recordings of webinar trainings as a refresher or to train new hires.
- 3. Use quarterly onboarding series:**
Leverage Total Expert's quarterly onboarding series to onboard any new end users after your implementation.
- 4. Develop a 6-month success roadmap:**
Map out a 6-month success plan for new end users on the platform and be sure to include training milestones that should be completed along the way.
- 5. Conduct a 30-day check-in call:**
For each new user, schedule 30-, 60-, and 90-day check-ins to review their data (contacts, email metrics, and so on) and onboarding progress, and suggest additional training as needed.

Promoting Ongoing Adoption

- 1. Create a centralized engagement hub:**
Create an intranet page dedicated to Total Expert and other technology partners with links to help resources, training videos, and new creative materials. Create playbooks, handouts, and training videos for how to best use Total Expert so that your end users can easily access. View the Total Expert knowledge base to leverage pre-built resources.
- 2. Host monthly field enablement calls:**
Use recurring calls to showcase new content, engagement metrics, upcoming trainings, and feature releases. Add gamified challenges or incentives to boost attendance and engagement.
- 3. Drive attendance to the Expert Academy trainings:**
Promote and attend monthly Total Expert led trainings from the Expert Academy.
- 4. Secure executive champions:**
Focus on executive buy-in and ensure that your leaders promote and encourage use of the system.
- 5. Highlight top users:**
Showcase quotes and data from top producers—champions are your biggest asset! Leverage our gamification email templates or your own monthly marketing email to share this information with the field.



Sustaining Long-Term Engagement

- 1. Adopt an all-in, all-on mindset:**

Make Total Expert the preferred technology partner for your end users and ensure journey communication is automatically running for all of your end users.

- 2. Gather feedback from power users:**

Engage your top performers to identify high-impact use cases and convert them into scalable templates for broader team adoption.

- 3. Host quarterly Total Expert bootcamps:**

Host internal training sprints to onboard new users or re-engage seasoned ones. Keep sessions short, tactical, and interactive. Consider adding gamification into your sessions.

- 4. Stay on top of product releases:**

Make sure you are staying on top of new product releases and sharing information and training your end users on any new features that are applicable to them.

- 5. Review and refresh your journeys:**

Each time Total Expert releases updated Expert Content journeys or content, set aside time to review the materials and update your existing content accordingly. Consider building a quarterly journey review cadence to ensure your platform aligns with our current best practices, messaging trends, and user engagement insights.