

Monthly Newswire

Welcome to our monthly newswire. We hope you enjoy reading this newsletter and find it useful.

November 2020

Customer Onboarding

If your customers have a positive experience from the very beginning, they are going to stick with your product or service and continue to do business with you.

Customer onboarding is the nurturing process that gets new users and customers acquainted and comfortable with your product or service. A positive onboarding experience confirms to your customers that they made the right choice. It also, ultimately, helps you retain them.

A good customer onboarding program can include step-by-step tutorials, guidance, support, and milestone celebrations when a customer achieves success through your product or service.

Creating a customer onboarding strategy is relatively easy. Start by creating a key objective such as “get your new customers to use your product or service more than once a week for the first 10 weeks”.

In order to onboard them effectively, you need to really know your new customers. Some of the information that you gather about your customers during the marketing and sales processes will carry over into the initial stages of onboarding. Try to understand the challenges and pain points that each new customer faces. You can then help them to create solutions to some of those challenges, through using your product or service.

Your sales process should set clear expectations so that customers are prepared to invest time in getting set up with your product or service.

A good onboarding process should reiterate the value that your product or service provides to customers. You could include a personalised kickoff call, specialised training, or documentation to help your new customers get everything set up in order to address some of the pain points or challenges that they face.



Regular communication is important during the customer onboarding phase of a business relationship. An initial welcome message is a good place to start. Following the welcome message, you should spend some time with your new customers in order to help them set goals and KPIs that are unique to their business. Allow them to define success and help them to create measurable milestones.

Once you have agreed a set of goals you should continue to contact your new customers on a regular basis for the first couple of months in order to offer tutorials, guides and training, and to keep them on track with achieving their business objectives.

Diversity in Leadership

The business case for diversity is clear - diverse teams produce better solutions to complex problems.

Diversity can boost innovation and employee engagement. Businesses with greater gender and racial diversity tend to be more successful and perform very well financially.

However, progress within the business community has been slow and there is still a lack of women and minority ethnic groups in leadership positions. In order to create truly inclusive and diverse firms, businesses need to start by creating more diverse teams, from the top down.

Making Diversity and Inclusion part of your culture puts your business ahead of the curve and focusing specifically on your leadership team can help facilitate a top-down approach, so that it trickles through your entire firm. However, adding diversity to your board is not a simple task, and there are numerous ways to implement a D&I initiative at leadership level. The way in which you decide how diverse your board should be and which individuals are right for the role will vary from one business to the next.

Many businesses are now adopting an approach where existing senior leaders sponsor the next generation of managers and directors. Pairing sponsors and proteges in a way that aligns with the goals of the businesses can help to bring the next generation of successful senior people through.

While sponsors don't have to mirror all the qualities of their mentees, it is certainly easier for an individual to be led by someone who they can relate to. This is worth bearing in mind when you are selecting your sponsors from the current leadership team.

When looking at how to create a more diverse leadership team in your firm, it is important to think about your customers. Every business relies on creating a strong relationship with its customers.

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Call: 028 90 32 00 39 Email: info@dntca.com

As such, the makeup of your leadership team should reflect the diversity of your customer base. For example, if your firm sells products that are mainly aimed at women, a leadership team that is made up entirely of men may have more difficulty understanding the needs of the women who buy your products or services. A more diverse board with a blend of genders can add different perspectives that can help to align the objectives of the business more closely with the goals of its customers.

Managing a Hybrid Team

As businesses manage the gradual return to the office, some of your team will be able to come back while others may need to continue working remotely.

As firms begin to navigate the complexities of returning to the office, some employees will have to contend with challenges around childcare, health issues that prevent them from returning to work, anxiety and other factors. By contrast, other employees will be racing back to the office as they may have found working from home to be isolating or challenging in other ways. All of this creates a new challenge for managers - how to manage a hybrid team, where some people are in the office and others continue to work remotely.

Set expectations

Avoid creating an atmosphere of "them versus us". Set expectations and make accountability clear to all staff so that both home and office-based employees can work together productively and know who is doing what.

As part of this, you might run daily or weekly meetings with your entire team to start each day or week on the right foot, then share progress regularly on key projects with the entire team to maintain momentum.

Define clear working hours

This will help you and your team know who is working when and where. Sharing your work calendars will help to further boost visibility of this crucial information, enabling your team to know what each person is doing at any one time, including colleagues who they do not physically sit next to in the same space.

Communication is key

Remote workers can miss out on face-to-face interaction. This means you'll need to think carefully about how you can make them feel equally included via virtual remote meetings, during which you as the leader might be sitting next to an office-based member of your team.

When communicating with remote team workers, choose voice or video over email or chat, depending on the task. Seeing and hearing you regularly will help your remote staff to feel included and part of the team. Encourage your remote workers to switch on their video when attending team meetings.

Bring everyone together

Once COVID-19 is over and government restrictions lift, it can help team unity, harmony and morale if you arrange occasional opportunities for your hybrid team members to meet and get to know each other face-to-face. In "normal times" maybe try to arrange an all-team social or dinner, every 6 months. The relationships that are built through these events will help your team to function better as a unit.

The Off-Grid Day

Blocking out a whole day once a month can work wonders for your productivity.

Time management courses, books and best practice all suggest carving out some time each day to focus on being productive and working towards your goals and personal business objectives.

However this often conflicts with the emails, notifications, calls and reminders that we are all bombarded with on a daily basis.

The traditional approach to time blocking simply doesn't go far enough. Blocking out an hour each day might give you time to focus on progressing a particular project, but just as you start to get into your groove, your hour will be up and you'll have to move on to the next thing on your agenda.

Calculating the return on investment on time blocking is pretty straightforward. If you are focused on what you want to achieve, then the more time you block out, the greater the return you will experience in terms of productivity. So how about blocking out an entire day, once a month?

To make this work, focus on your key business objectives. Perhaps you are working on a particular project such as entering a new market or launching a new product. Try blocking out one day per month to progress those key objectives. Aim to start early, say 7am and finish late. Log out of your email and block out the time in your calendar. Make sure that your colleagues know that you are uncontactable for the day and ensure that there is another senior person available to handle any queries that come up during the day.

Even short interruptions can interrupt the continuous flow of your off-grid day so make a deal with yourself - no calls, no email and no distractions. In order to make these key days work, populate your off-grid days in your calendar for the next 12 months and defend those days - don't give them up for anything.

Finally, in order to maximise your off-grid day, you may need to enlist the support of your family to take care of the day to day logistics of family life. The key thing is to remember to say thanks and to pick up your share on other days. Like everything in life, it's all about balance.

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