

Stages Onboarding Process (CSM)

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Purpose

This article provides Bold Group staff with standardized best practices for managing ****Stages onboarding projects****. It captures common risks, customer responsibilities, and internal processes to improve customer outcomes and reduce escalations.

Scope

- Applies to: All Bold Group employees engaged in Stages onboarding projects (Customer Success, Implementation, Professional Services, Support).
- Does not include: Customer-facing instructions (see Stages Knowledge Base).

Overview

Stages onboarding follows a structured path:

1. Kickoff & Discovery – Align on goals, assign internal and customer roles.
2. Data Mapping & Conversion – Customer-prepared data scrub and mapping into staging documents.
3. Training & Validation – Customer completes assigned training, replicates key workflows in Stages.
4. Go-Live & Transition – Final conversion, checklist validation, support handoff.

Each phase has critical internal checkpoints that prevent downstream issues.

Responsibilities

Customer:

- Prepare and scrub data prior to staging (duplicates removed, formats standardized).
- Complete required training before 1:1 sessions are scheduled.
- Assign internal Implementation Lead and Data Owner.
- Actively participate in weekly status calls.

Bold Group:

- CSM: Own customer relationship post-kickoff, monitor adoption, ensure success plan is documented.
- PM: Drive project timeline, track milestones, escalate blockers.
- Support: Accept handoff post-go-live, provide SLAs for case handling.
- Product: Provide roadmap transparency when customer expectations exceed current functionality.

Common Risks & Pitfalls

- Data not scrubbed → Incorrect/incomplete staging, delays in conversion.

- Training incomplete → Customer unprepared at go-live, higher case volume.
- Unclear ownership → Customers bypass PM/CSM, causing miscommunication.
- Resource constraints → Delays in escalations, longer response times.

Best Practices

- Provide customer with a formal onboarding checklist during kickoff.
- Reinforce early: Stages offers extensive customization through Sequences and workflows. However, these must align with industry best practices and Bold-supported functionality. Requests for custom development outside of standard features must be reviewed with Product.
- Set expectations that data prep is customer-owned. Offer templates/examples, but do not perform the cleanup.
- Conduct at least two test conversions (C1, C2) before go-live.
- Schedule a warm handoff call to Support to introduce portal, SLAs, and escalation process.
- CSM to schedule a post-go-live pulse check (30/60/90-day cadence).

Internal Escalation Points

- Sales → CSM: If scope misalignment is discovered at kickoff.
- CSM → Product: If customer expectations exceed delivered functionality.
- PM → Support Lead: If case resolution times exceed agreed SLAs.

Related Articles

- Customer Journey Map – Stages (internal reference)
- [How to Submit a Case in Support Portal \(download as a PDF\)](#)
- CSM Handoff Checklist Template (internal KB)

Planned Customer-Facing Resource

A customer-facing Stages Onboarding Guide is currently in development.

- This will mirror the structure of existing onboarding guides for Managely and Manitou.
 - The guide will provide customers with step-by-step instructions, role expectations, data prep requirements, and FAQs.
 - Once published, this internal article should be updated with a direct link.
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