# WHITEPAPER



# Introduction

Switching vendors: it's a decision that's met with more than just trepidation about the onboarding process. At the core of this hesitancy lie two primary concerns.

First, there's the genuine worry of disruption to business operations.

- Will a new vendor affect our delivery timelines?
- Might there be unforeseen delays in our projects?
- What if they make mistakes that we hadn't experienced with our previous vendor?

Even beyond these operational questions, there's a more personal apprehension: What if the new vendor under-performs and, as the person who recommended them, my reputation or job is at stake?

Secondly, there's the consideration of the workload involved. Onboarding a new vendor can seem like a daunting task, adding another layer to an already busy schedule. The mere thought prompts questions like, "How much extra effort will it take to get them up to speed? Do I really want to invest this time?"

At Nahan, we understand these concerns deeply, and that's why we're committed to simplifying and optimizing our onboarding process. We aim to make transitions seamless, minimizing disruptions and ensuring our partners feel confident in their decision to join forces with us.

## Why Onboarding Matters and How Nahan Prioritizes It

When considering a switch in vendors, clients invariably face the decision with a measure of concern. Questions about potential disruptions, additional workloads, and unforeseen challenges frequently arise. We get it. At Nahan, we recognize the significance of the onboarding process as a crucial transition phase for our clients, and it's precisely why we've honed our approach to address these concerns head-on.

The onboarding process, when executed seamlessly, is more than just a series of introductory steps. It's the foundation of our partnership. It determines the pace at which your projects take off, the clarity with which objectives are outlined, and the efficacy with which potential challenges are tackled.

A meticulous onboarding process is paramount because it sets the stage for success, minimizing risks and ensuring our clients feel heard, supported, and valued.



At Nahan, our commitment is unwavering: to make the onboarding journey a reassuring experience that underscores our promise of reliability and excellence.

In a world where change can be daunting, our onboarding process is designed to be the bridge of trust between Nahan and our clients.

- Krista Black, VP of Marketing Services

In this white paper, we will explore the nuances of Nahan's white-glove onboarding, emphasizing the personalized attention and exceptional customer service you can expect throughout the process.

# Key Takeaways of a Streamlined Onboarding Process

## Streamlined Onboarding Improves Efficiency and Organization

A streamlined onboarding process plays a crucial role in enhancing efficiency and organization in partner/client relationships. A partner that provides this type of onboarding can help minimize the time and effort to get your direct mail program up and running smoothly. When a partner efficiently guides your business through this process, they help establish a strong foundation for collaboration, reduce the potential for misunderstandings or delays, and foster a sense of trust and confidence in the partnership.

Additionally, a partner who streamlines onboarding can ensure consistency across different client partnerships and avoid ad hoc approaches that may lead to confusion or inefficiency. A well-defined onboarding process enables teams to allocate resources effectively, anticipate and address potential challenges, and align internal workflows to support client need, not only saving time, but boosting productivity.

A streamlined onboarding process facilitates better communication and collaboration between internal teams and clients, ensuring everyone is on the same page and working towards shared objectives.

# Structured Onboarding Sessions for Enhanced Productivity and Collaboration

Breaking up the process into short, pre-scheduled sessions provides significant benefits. Firstly, it allows for better time management and resource allocation. By dividing the

onboarding process into manageable sessions, customers can allocate specific time slots for each session, ensuring that they have sufficient time and the right resources and key stakeholders needed to accomplish the tasks at hand. This prevents overwhelming each other with information, which can lead to confusion and inefficiency. Instead, we approach each session with a clear understanding of the objectives and requirements, to maximize productivity and engagement.

Secondly, scheduled sessions enable the customer to actively participate in the onboarding process. By breaking the process into smaller chunks, customers can provide timely feedback and more easily ask questions, promoting a more interactive and collaborative relationship.

# Involvement of the Account Team Ensures Well-Rounded Experience

The involvement of different members of the account team, from directors to managers, ensures a thorough and well-rounded onboarding experience for clients.

# Nahan's 3-Step Approach to Onboarding

Onboarding is a complex process and can be overwhelming when not approached correctly. We break it down into multiple, shorter, more manageable sessions to remove the headache.



## **Session 1: Program Overview**

In our first session, we focus on introducing the team, reviewing the onboarding process and timeline, and provide a summary of the first job's schedule, followed by time for Q&A. This session is led by the client's dedicated Account Executive and sets the stage for the rest of the onboarding process.

This session sets expectations and helps to build trust between the Nahan team and the client team. We want to make sure everyone is on the same page, feeling energized, and organized from the very beginning of our relationship.

- Krista Black, VP of Marketing Services



## Session 2: Program Details

In the second session, we dive deep into the nitty-gritty aspects of your program to ensure alignment between your expectations and our execution. This critical session is co-led by your Account Executive and Account Manager, and it's the phase where we hash out – and clearly document – all the finer details that make your program uniquely yours so that we can educate team members across all departments that will touch your work on your requirements and expectations.

#### **Meet Your Nahan Team Members**

Before we dive into the specifics of preferences and requirements, let's clarify who you'll be working with on our end:









Each role has a unique focus to ensure smooth and effective project execution.

Session 2 is not just about checking boxes; it's about entering into a collaborative partnership where we co-create the road map to your project's success.

- Jen Bender, Director of Account Services

#### **Unveiling Preferences and Requirements**

Right off the bat, we'll discuss your preferences for print and proof samples. Do you have any particular styles, colors, or formats you want to prioritize? We'll make sure to understand precisely what you'd like to review before releasing jobs into production.

#### Data Sign-Offs and Approvals

Who in your organization needs to see the data proofs? What's your expected turnaround time for proof review and approval? In this session, we solidify these details to eliminate any guesswork later, ensuring a seamless transition from data collection to production.

#### Mailing Instructions and Reporting Needs

Whether it's specific mailing requirements or reporting expectations, we want to hear it all. Do you need input and output counts? How granular do you want the reporting to be—down to counts by version, by state, by dropped records, etc.? Would a return file of records that were mailed (or records that dropped) be helpful?

#### Invoicing

Lastly, let's not forget about invoicing. Do you require specific outlines or accompanying documents with your invoice? It's these little details that help us serve you better, by making the invoicing process as painless and transparent as possible.

This comprehensive session not only helps us understand the logistical ins and outs of your program, but also serves as a strategic planning session for upcoming calls and any off-shoot meetings needed before finalizing the job.



#### **Session 3: Job Preparation**

The final session, led by the Account Manager, typically occurs roughly 3-5 business days prior to art and data coming in. The focus of this session is confirming that art and data will be coming in as scheduled and reviewing any questions that need to be answered to finalize job instructions.

At this stage, we want to make sure we have everything we need to move forward with the job and that there are no surprises for Nahan or our client when the job hits the production floor.

- Sheila Walter, Client Services Manager

The team also reviews the process that the client will experience once their files come in, providing reminders of proofing, reporting, and invoicing processes. This ensures that the client is aware of what to expect and that there is a clear understanding of the next steps.



# Conclusion

In the dynamic world of B2B partnerships, the onboarding experience is often overlooked, yet it sets the tone for the entire customer journey. Potential disruptions, added workload, and unforeseen challenges can deter businesses from exploring new vendor relationships.

Recognizing these genuine concerns, Nahan's commitment is to transcend the traditional onboarding process and offer an unparalleled white-glove approach. Our focus is on personalized attention, collaboration, and high-quality customer service to ensure a seamless transition.

It's clear that onboarding isn't just about integrating a new service or vendor into your workflow; it's about establishing a foundation of trust, setting clear expectations, and ensuring that both parties are aligned for mutual success.

With Nahan, you're not just gaining a vendor — you're acquiring a partner dedicated to your success from day one.

### Take the Next Step

Experience the difference of Nahan's white-glove onboarding firsthand. Let's start a conversation and begin a partnership where your concerns are acknowledged, addressed, and resolved.

Contact us today to get started

Call **320.217.7700** or email **info@nahan.com** 

# nahan

# Real Connections, Real People

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