



Project Summary

Welcome to GreatCo!

The broad goals of onboarding are getting to know:

- GreatCo (the product)
- GreatCo (the culture)
- The greats (the peeps).

Customer Experience | Key Elements of our role at GreatCo

Services, Support & Success:

- How we interact with our fellow GreatCo teammates
- How we engage with prospects/customers
- Implementation/Onboarding approach
- How we scale going forward
- Metrics we are tracking

Learn more about all of the above and you'll reach a clearer understanding of what we do as Customer Success and how we do it. Remember that the learning never stops, and you're already well on your way to becoming a CSM yourself!



Helpful resources include:

- The CX team! – Please ask us questions and let us know when something doesn't make sense to you— we are always learning too :)
- Our Guru instance (GreatCo HQ) – GreatCo HQ is our team's internal single source of truth. Utilize Guru to search Cards for content as well as the Q&A feature. Remember to try and "check Guru" before you ask.
- GreatCo's Help Center [\[link\]](#) (also the "Help Center" Collection in Guru) – This is our external-facing resource full of "how-to's" and overviews related to using our product. Search for answers and drill down to discover more about our product. (And make sure to let us know if anything you see is unclear or has a typo!)