

# Onboarding Customer Qualification Criteria and Pain Point Remedies

This reference sheet is for sales and account management teams to qualify potential onboarding software prospects. Use the provided questions and recommended pain point remedies (key benefits) to evaluate lead opportunities. You may connect qualified leads with [sales@talent.software](mailto:sales@talent.software).

## QUALIFICATION QUESTIONS

1

**Are they actively onboarding new hires now or in the near future?**

→ *Listen for: Currently onboarding or will be soon*

2

**What do their current process and tools look like?**

A

Are they using existing software, pen and paper, or have no process?

→ *Listen for: Outdated processes, frustration*

B

What training or action items take place outside of the onboarding process/existing software?

→ *Listen for: Fractured or inefficient processes*

3

**What is most important for new hires to have completed as quickly as possible?**

→ *Listen for: Key components in their onboarding process that would be optimized with software*

A

Paperwork (W-4, direct deposit, etc)

B

Compliance documentation

C

Company-specific onboarding requirements (culture & compliance, intros to different departments, etc)

## PAIN POINTS → SOFTWARE BENEFITS



### Piles of Paperwork



Automation boosts productivity with a centralized and structured process.



### Challenge of Staying Compliant



Consistently cover compliance with automated and tracked documents, tasks, and reminders.



### No Flexibility with Current Tool/Process



Design your ideal solution by easily setting up and customizing company-specific workflows.



### New Hires Feel Lost and Churn is High



Showcase your company culture and boost retention by giving your new hires a world-class welcome.



### New Hires Have a Long Ramp Up Period



Fast-track new hire impact with effective onboarding that helps new hires get up and running fast (boost "Time to Productivity").

**Connect prospects to [sales@talent.software](mailto:sales@talent.software)**