



CASE STUDY

Driving Success with Handshake's 4-Step Onboarding

How Vega made the transition to digital sales order entry software with Handshake's comprehensive onboarding process.



Drive more revenue and boost efficiency with a seamless Handshake onboarding.

At Handshake, customer success is paramount, and the foundation of that success is a great onboarding experience. From complex integrations to sales training, Handshake Customer Success Specialists work one-on-one with companies to make the process as smooth as possible.

An Onboarding Success Story: Vega

Vega, a leader in natural nutrition and performance products, has been fueling their active, health-conscious customers since their launch in 2001. They currently have rep teams across the United States and Canada, each visiting 30 to 50 stores on a weekly basis.

As a brand committed to sustainability, Vega was growing tired of the paper order forms and fillable PDFs they were using to take orders. Errors were all too common, and they had a team of seven working full-time to painstakingly re-enter orders from the daily wave of faxes, emails, and phone calls flowing into the back office.

When Lindsay Jesseau, Vega's Director of Customer Experience, discovered Handshake's order entry software, she knew it was the solution they'd been searching for.

With sales on the line, it was critical for Vega to get off to a strong start and avoid hiccups in the setup process. They eventually signed on for a Handshake Professional account, with a dedicated Customer Success Specialist to guide them through Handshake's 4-step onboarding.

Vega's Discovery Call

The first step to any Pro onboarding is a discovery call that serves as a deep dive into a company's needs, workflow, and goals. Vega explained that they would use Handshake's order entry software primarily in the field, as well as at trade shows four times a year.

The 4 Steps of Handshake Onboarding

Step 1: The Discovery Call

Handshake finds out about a company's workflow and other details critical to account setup.

Step 2: Account Setup

Data is organized and uploaded, from pricing and product information to customer lists and past orders.

Step 3: Admin Training

Internal admins learn how to add products, adjust pricing, and make other changes in Handshake when needed.

Step 4: Sales Rep Training

Sales teams participate in a customized training to get them fully ready to start making sales.

Average onboarding timeline:

1-4 weeks

Every onboarding is completely customized to a business's goals and workflow.

It also became clear that the complexities of their data-mapping would require a focused approach.

In sum, Vega's key priorities were:

1. Smoothly completing a complex integration between Handshake and their ERP, Netsuite.
2. Ensuring that Handshake would adapt to their unique requirements, like setting pricing and discount structures for certain retailers.
3. Making the implementation process easy and painless for a sales team nervous about new technology.

Vega's Account Setup

In accordance with Vega's system of transferring orders into Netsuite, the main goal during the account setup was to map the data correctly within Handshake. Stephanie, their dedicated Customer Success Specialist, worked directly with Jesseau and her team to make sure the data upload went without a hitch.

"How we upload orders into our Netsuite system is tedious, and we had to make sure the data matched up exactly. The Handshake team helped us create the right data columns and structure so order information could go out of Handshake and into Netsuite smoothly and efficiently."

- Lindsay Jesseau, Director of Customer Experience

Vega's Admin Training:

After all the products, customer lists, and pricing information were uploaded to their account, it was time to train Vega's Handshake administrators, including Jesseau, an IT Specialist, and Vega's Data Entry Supervisor.



Lindsay Jesseau

Director of Customer Experience, Vega

"It was amazing how quickly reps adopted Handshake and started using it. I think it was within a week of training. Typically, when you're looking at a project like this, it can take months and months to get it all put together, and that was my biggest fear. But Handshake made it quick and easy."



Stephanie Bell

Handshake Customer Success Specialist

"New technology doesn't have to be intimidating. The best part about onboarding is simplifying complex problems and really making it "click" for others so that they can improve their business."

Extensive, personalized trainings get teams on track to make more sales.

This step ensures that within the company, internal administrators have the ability to:

- Seamlessly manage the account post-onboarding.
- Make sure any seasonal or ad hoc changes are done correctly.
- Act as a direct line to their Handshake Customer Success Specialist when support is needed.

During the training, Vega's admin team was taught how to navigate Handshake, customize their account, and address any future issues.

Vega's Sales Rep Training:

For the last step in the onboarding process, Stephanie worked with Vega's administrators to plan and structure the sales rep training, and it was scheduled at a time convenient for the majority of their sales team, who were working across several time zones.

During the training, Stephanie pulled up Vega's new account, now fully stocked with familiar products and customers. Essentially, the sales team was able to see Handshake exactly as they'd use it in the field. Vega's reps were trained on the basics, including how to write an order and navigate their product catalog within Handshake's order entry software, and Stephanie answered whatever questions they had.

The ultimate goal of the sales rep training is to transform the way reps see the sales process. With Handshake, there is no special pricing, shipping terms, or contact information to remember. There are no extra steps to submitting an order after it's written. The only thing sales reps have to do is concentrate on selling.

Epilogue: After the Onboarding

Handshake is now successfully powering Vega's field sales teams, and the company has been able to reallocate resources from data entry to more revenue-generating projects. Errors have been

Handshake Sales Rep Trainings Include:

- A webinar presentation that all reps can join, regardless of location
- An interactive Q&A session
- Contact information for Handshake's Customer Success Team, who can offer ongoing support
- A recording of the training for future reference



Lindsay Jesseau

Director of Customer Experience, Vega

"The rep training was so thorough. The main feedback from reps was that Handshake seemed really easy, and they were ready to go!"

Onboarding designed with your success in mind.

drastically reduced, and orders are now processed more efficiently than ever.

Vega has also loved the benefits of having a dedicated Customer Success Specialist to help them through any questions they've had since the onboarding. "The level of service has been fantastic. Whenever we have questions, it's a quick email, and we get a response right away. Having a real person you can connect with is really helpful," says Jesseau.

From account setup to writing that first order, every Handshake onboarding is constructed to be as easy as possible for companies and their teams. Want to learn more about how Handshake's order entry software can transform your business? Contact us today.

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The 5 Key Impacts of Vega's Onboarding

1. A complete, seamless ERP integration
2. An easy transition for a large international sales team
3. Data entry resources reallocated to revenue generation
4. Instant order sync and no manual data entry needed
5. Customer-specific pricing automatically applied to each order