DISTRIBUTORS ON RAB360

The pilot phase has taught us a lot about onboarding. The most effective strategy we've seen is to first get buy-in with an influential figure at the top, then move down to the branches.

We've organized our learnings into repeatable steps to help you deliver a seamless onboarding experience for your customers!

REQUEST FOR A DEMO ACCOUNT

Contact jerryc@rabdesign.ca to get your personalized Demo 360 Account and Demo Email Login for the customer you are onboarding.

The account will be from the customer's point of view, personalized with their logo, pricing, CSR, sales agency, etc.

INTRO EMAIL & SCHEDULE DEMO CALL

Introduce RAB360 to a top-level manager at the distributor and schedule an initial demo call.

Send them the Sell Sheet Fr and Signup Process Fr documents as part of the introduction.

PREPARE FOR DEMO

Use the Demo Outline and Demo Example Video to help you prepare for the call. You can contact jerryc@rabdesign.ca at any time if you have any questions.

INITIAL DEMO CALL

After the demo call, the manager sees the value and becomes a RAB360 Champion. Let them help you push RAB360 to the branches!

Next Step: Ask them to schedule a second demo with branch managers and lighting managers.

SECOND DEMO (EXPANDED GROUP)

You can record this session to use as training material for the branch users. The people in this demo are future branch admins. Once they see the value, they are eager to get their branches online.

Next Step: Send them the Admin Guide Fr and the Signup Excel They need to fill in the excel with their branch's initial users so we can take care of the initial user setup.

INTRODUCE 360 TO BRANCH USERS

When you get the excel sheet back , send out an email to the new users to let them know what to expect. Attach the How to Login Fr and Quick Start Fr documents to get them started.

To incentivize them to log in, mention the core benefits of the portal - quickly check cost, availability, and track orders.

SEND US THE EXCEL TO CREATE USERS

Send the excel sheet back to us and we will take care of adding all of the initial users.

FOLLOW UP FOR BRANCH TRAINING

Follow-up with the branch managers to see if they require a demo with their new 360 users.

You can send them your recorded demo video (from second demo call) to use as self serve training material for their branch.

https://linktr.ee/rab360_support

CHECK LIST

Use the check list below to make sure you have everything for each step.

- [ ] Contact RAB
- [ ] Demo Email Login
- [ ] Demo 360 Account

- [ ] Sell Sheet Fr
- [ ] Signup Process Fr

= found by clicking the buttons on this document

- [ ] Demo Outline
- [ ] Demo Video

- [ ] Demo 360 Account
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- [ ] Hidden Access Fr

- [ ] Demo 360 Account
- [ ] Signup Excel
- [ ] Admin Guide Fr

- [ ] How to Login Fr
- [ ] Quick Start Fr
- [ ] Sell Sheet Fr

- [ ] Send us the excel

- [ ] Follow Up