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Embedded tool for self-directed sales and onboarding

ABSTRACT

This disclosure describes an embedded link (button) within a video or other media content that enables users to obtain additional information and perform self-directed onboarding, e.g., to an online service. Per techniques of this disclosure, an embedded link is provided within a video, document, email message, etc. that enables the user to navigate to a portal that is a source of additional information and that offers a self-directed onboarding process for the online service. The customized onboarding portal is utilized to obtain additional user information. Based on the user provided information, solution options, e.g., specific service configurations, are presented to the user.

KEYWORDS

- Customer onboarding
- Software-as-a-Service (SaaS)
- Training video
- Onboarding portal

BACKGROUND

Users researching a product or service, e.g., an online service such as a document management service, a cloud platform, etc. often view videos that provide information regarding available services. In some cases, a user may wish to obtain additional information, e.g., technical details, configuration details, pricing, etc. regarding the product or service without having to speak with a salesperson.

DESCRIPTION

This disclosure describes an embedded link (button) within a video or other media content that enables users to obtain additional information and perform self-directed onboarding, e.g., to an online service. Per techniques of this disclosure, an embedded link is provided within a video, document, email message, etc. that enables the user to navigate to a portal that is a source of additional information and that offers a self-directed onboarding process for the online service

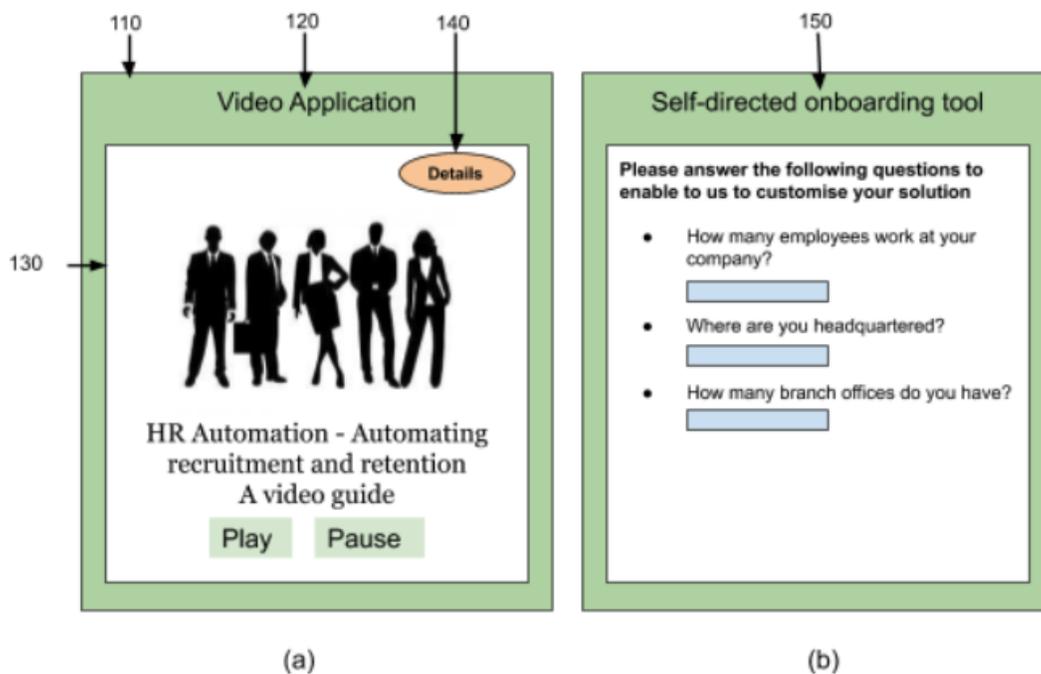


Fig. 1: (a) Embedded link in video; (b) self-directed onboarding via link

Fig. 1(a) illustrates an example video (130) viewed on a video application (120) (e.g., via a video hosting website) using a computing device (110). In this illustrative example, the user is viewing a video on HR automation as part of their research for a potential solution. An embedded link (140) is provided within the video that enables the user to obtain additional information.

Fig. 1(b) illustrates an example self-directed onboarding tool (150) accessed by the user based on the provided embedded link. The onboarding tool (portal) is utilized to obtain additional user information, e.g., company size, headquarters location, etc. and to qualify the user's interest in the product. The onboarding portal is customized for the particular product or service, and serves as a guide to the user. Based on the information provided by the user, suitable product configurations and options are presented to the user via the onboarding tool.

With user permission and express consent, the user provided information can be transmitted to sales personnel associated with the solution provider that sells the product. The user provided information can be utilized by the solution provider to tailor appropriate solutions based on user specified requirements and constraints. While Fig. 1 illustrates an embedded link in a video, the link can be included with any type of content such as an email or other document associated with the product or service.

A provider such as a SaaS vendor or a cloud platform vendor can provide the customer onboarding portal as a service, e.g., Customer Onboarding as a Service (COaaS). The onboarding portal enables new customers to onboard themselves in a self-serve manner. It can also enable fast sales routing alignment and provide lead data to sales representatives for efficient follow up. The portal educates potential buyers and can build customer trust even before engagement with a salesperson begins. A customer onboarding portal can reduce the time-to-revenue for products or services.

CONCLUSION

This disclosure describes an embedded link (button) within a video or other media content that enables users to obtain additional information and perform self-directed onboarding, e.g., to an online service. Per techniques of this disclosure, an embedded link is

provided within a video, document, email message, etc. that enables the user to navigate to a portal that is a source of additional information and that offers a self-directed onboarding process for the online service. The customized onboarding portal is utilized to obtain additional user information. Based on the user provided information, solution options, e.g., specific service configurations, are presented to the user.