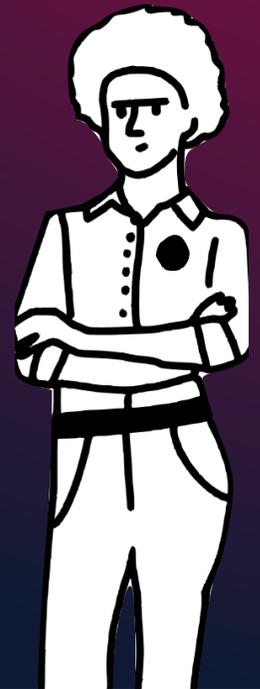




B2B Success Front Setup Checklist

Welcome to Front, the customer communication hub for success teams. No matter how many customers you're serving, Front will help your team make every one feel like a VIP.



6,500+ High-impact teams rely on Front





Use this checklist to set up Front for your success team. Need a hand? Reach out at onboarding@front.com.

STEP 1: Add your Structural Elements

- Add your inboxes
 - We recommend organizing your inboxes by the group of people handling the messages. For some success teams this means just a VIP customer (example: front@company.com), while others operate in a pooled model (example: success@company.com).
 - Tip: Front is an omnichannel platform, so be sure to add your social media channels, SMS, WhatsApp, phone, and more to get a full view of a customer's timeline.
- Import your contacts
 - Use the provided [CSV template](#) to easily and quickly upload your contacts.
 - Tip: Use the [Contact Details plugin](#) to see a full timeline of communication with each customer. You can see calls, texts, emails and more.
- Import your account information
 - Use the provided [CSV template](#) to upload all of the companies or organizations your team works with.
- Enable relevant integrations
 - Sync your CRM data or success solution like Gainsight with Front, so your success team can easily manage their renewals.



STEP 2: Build your Success Team Workflow

- Determine your message triaging with assignments and routing
 - You can build rules to automatically assign conversations based on their customer success or onboarding manager.
 - Create tags to track topics like “VIP Customer”, customer sentiment, and more
 - Build message templates to allow your team to reply to common questions or to schedule meetings and executive business reviews
 - Automate your processes through rules
 - Example: You can use the rules library to auto-tag all conversations from VIP customers, so your team can easily and immediately see when they write in.
 - Create SLAs for your team to respond on time, every time
 - Optional: Create CSAT surveys and signatures to capture customer satisfaction on every interaction
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STEP 3: Invite and Train your team

- Have your team attend a live Front Training Session
- Invite your team
- Set up signatures
- Have the team build scheduling links with Front Calendar to invite clients to meet