

# Customer Onboarding

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## Purpose

To take a new trial signup from first contact to an active, value-realising customer — consistently, within 14 days of signup.

## Owner

**Predrag Tasevski** — CEO / Visionary

## Trigger

This process starts when a new trial signup is confirmed — either via the unicis.tech signup form (Mautic notification) or via a direct outreach that results in a trial account being created.

## Steps

1. **Signup confirmation** — Mautic sends automated welcome email with getting-started link. Predrag receives notification in Matrix (#sales channel). *\\Tool: Mautic, Matrix*
2. **Account created in Dolibarr** — Create a new third-party (Tiers) record in Dolibarr for the organisation. Link the contact to the Mautic subscriber record. *\\Tool: Dolibarr*
3. **Qualification check (day 1-2)** — Predrag reviews the signup: company size, country, use case. If the customer fits the [Ideal Customer Profile](#), proceed. If not, note in Dolibarr and continue nurture via Mautic only. *\\Tool: Dolibarr, Mautic*
4. **Welcome call booked (day 2-3)** — Send a personal welcome message via email (FreeScout) offering a 30-minute onboarding call. Use the Unicis Nextcloud Calendar link for scheduling. *\\Tool: FreeScout, Nextcloud Calendar*
5. **Onboarding call (day 3-7)** — 30-minute call via Jitsi. Cover: their primary compliance need, which framework to start with, how to import controls, how to invite their team. Record the call if the customer consents. *\\Tool: Nextcloud Talk*
6. **Follow-up + resources (within 24h of call)** — Send follow-up email via FreeScout with: summary of call, link to relevant documentation, link to the [Unicis Docs](#), and community Discord invite. *\\Tool: FreeScout*
7. **7-day check-in** — Automated Mautic email at day 7: “How is it going?” with link to feedback form. Predrag reviews opens and replies in FreeScout. *\\Tool: Mautic, FreeScout*
8. **Conversion conversation (day 10-14)** — If the customer is active (logged in ≥ 3 times, has at least one framework mapped), initiate a conversion conversation. Send Dolibarr quote/proposal with subscription options. *\\Tool: Dolibarr*
9. **Subscription activated** — Customer selects a plan. Dolibarr invoice sent. Wise payment link shared. Account upgraded in the platform. Record confirmed in Dolibarr as active customer. *\\Tool: Dolibarr, Wise, Unicis Platform*
10. **Handoff to ongoing success** — Add customer to the active customer Matrix channel or Discord. Assign to Alexander for ongoing support and community engagement. *\\Tool: Matrix, Discord*

## Output

The process is complete when:

- The customer has an active paid subscription in [Dolibarr](#)
- The customer has at least one framework mapped in the platform
- The customer record is complete in [Dolibarr](#) (contact, organisation, plan, notes)
- The customer has a support channel (Matrix or Discord)

## Tools

- **Mautic** — automated emails, lead tracking, nurture sequences
- **Dolibarr** — CRM record, quoting, invoicing, customer lifecycle
- **FreeScout** — personal outreach and support email
- **Jitsi** — onboarding call
- **Nextcloud Calendar** — meeting scheduling
- **Wise** — payment link for invoice
- **Unicis Platform** — customer's actual product environment
- **Matrix / Discord** — ongoing customer community

## Notes / Exceptions

- **EU Projects participants:** Organisations joining via OSC RAT, VIC, or other EU projects may have free access. Skip the conversion steps; ensure they are in [Dolibarr](#) as a project-linked account.
- **Self-hosted customers:** Steps 8-9 differ — they receive a licence key from billing.unicis.tech rather than a SaaS upgrade. Document separately once billing.unicis.tech is live.
- **Inbound partner referrals:** Note the referring partner in [Dolibarr](#) for commission tracking.

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## Revision History

Date	Change	Updated by
2026-05-25	Initial version	Predrag Tasevski

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[processes](#), [onboarding](#), [customer](#), [sales](#)

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