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| **STEP#** | **INTERNAL** | **EXTERNAL** | **WHY** |
| **1** |  | **Customers** sign up on **website** **[M]** | *All content & communication is housed on website* |
| **2** | **Website** saves customers to **database** + sends confirmation email to **Customers** **[A]** | **Customers** receive confirmation email **[A]** | *Website automates this entire step* |
| **3** |  | **Customers** open onboarding from **email** **[M]** | *Confirmation email has call to action button to complete* |
| **4** |  | **Customers** complete onboarding in **Software [M]** | *Onboarding materials were created in Software before website had required features* |
| **5** | **Software** documents completion of onboarding to **database** **[A]** |  | *For tracking Customers prepared to begin course* |
| **6** | **Instructor** downloads list of customer signups from **website [M]** |  | *Not possible to automatically email report to Instructor on website* |
| **7** | **Instructor** downloads list of completed onboarding from **Software** **[M]** |  | *Haven’t set up auto report feature in Software* |
| **8** | **Instructor** combines customer lists in a **spreadsheet** to create list of late Customers **[M]** |  | *Not sure whether there’s a way to auto-feed the list from the website into Software* |
| **9** | **Instructor** sends reminder email to any late Customers 3 days before deadline in **Gmail** **[M]** |  | *Ensure Customers complete onboarding. Current Software plan doesn’t include automatic reminders* |
| **10** |  | Late **Customers** complete onboarding in **Software [M]** |  |
| **11** | **Instructor** checks late Customers have completed onboarding in **Software** on deadline **[M]** |  | *Haven’t set up auto email notifications in Software* |
| **12** | **Instructor** sends cancellation email to **Customers** who missed deadline in **Gmail [M]** | **Customers** who missed deadline receive cancellation email **[A]** | *Courses become unwieldy when customers haven’t completed onboarding* |
| **13** | **Instructor** sends welcome email to **Customers**  who completed onboarding in **Gmail** **[M]** | **Customers** who completed onboarding receive welcome email **[A]** | *Inform customers of what to expect next*  *Current Software plan doesn’t include auto confirmation* |
| **14** |  |  |  |
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