

TRIAL TO PROFIT

MSP ONBOARDING JOURNEY MAP

Edgecore/wibipOS Trial Kit

STRATEGIC FOUNDATION

Customer Onboarding

"Onboarding is complete not when they're configured, but when they're seeing **first value**"

Nailing The Onramp

Three-circle model: Quick Win + Monitor + Invest = **Activated Customer**

Building Account Success Plans

Success = Desired Outcome + Desired Experience; milestone-based journey

Churn Buster Cheatsheet

"Increase commitment so clients take action" + handoff momentum principles

3-Way Call Transcript

"Order today, trial next week, deploy this month, profit this quarter"

DESIGN PRINCIPLES

01

First Value \neq Setup Complete

First value = MSP's first **paying subscriber** on wibipOS

02

"Trial" Language

Never "PoC" (validated in 3-way call)

03

Multi-Stakeholder Reality

MSP has technician, owner, and billing personas

04

Hybrid Environment

MSPs likely have legacy gear (Ruckus, Meraki) alongside trial kit

05

Time-to-Revenue Focus

MSPs care about **profit**, not features

THE MSP SUCCESS EQUATION

DESIRED OUTCOME

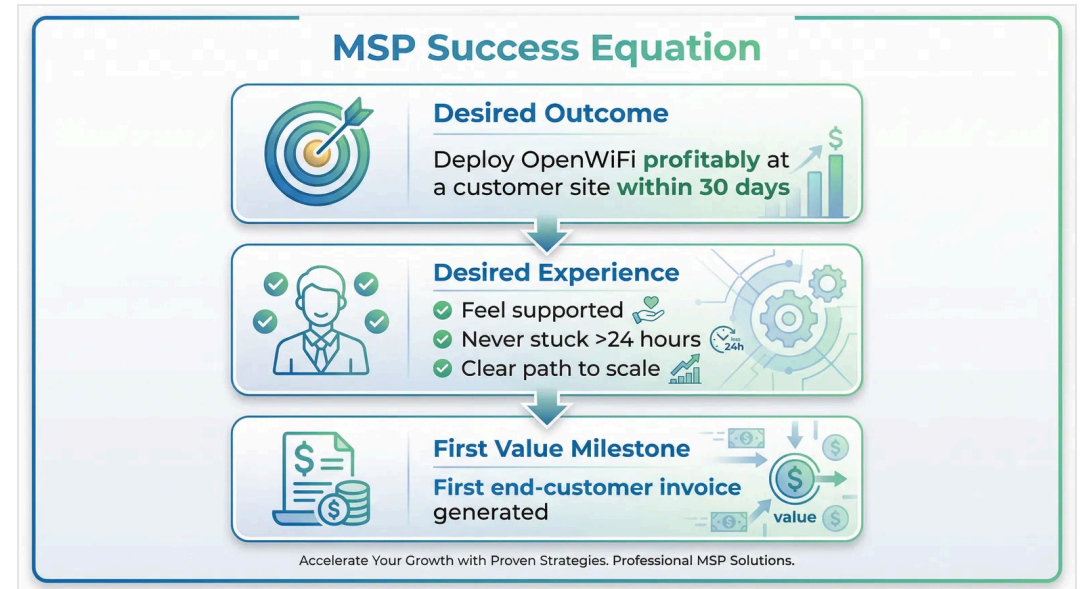
Deploy OpenWiFi **profitably** at a customer site within 30 days of kit arrival.

DESIRED EXPERIENCE

- Feel supported, not abandoned
- Never feel "stuck" for more than 24 hours
- See clear path from trial → production → scale

FIRST VALUE MILESTONE

First end-customer **invoice generated** through wibipOS-managed network.



JOURNEY MAP OVERVIEW

TRIAL TO PROFIT

PHASE

01

Days 0-3

COMMIT

| *"I'm in—show me this was the right decision"*

OBJECTIVE

Eliminate buyer's remorse, establish momentum, create psychological investment.

MSP EMOTIONAL STATE

Excited but skeptical. Made a bet on OpenWiFi. Needs reassurance.

PHASE 1: TOUCHPOINTS & ACTIONS

DAYS 0-3

DAY	TOUCHPOINT	OWNER	ACTION	DELIVERABLE
0	Order Confirmation	WiBUZ (auto)	Trigger welcome sequence	Email: "Your OpenWiFi journey starts now"
0	Internal Handoff	WiBUZ Sales → CS	Handoff brief with context	Shared doc: MSP profile, goals, existing stack
1	Welcome Video	WiBUZ CS	Personalized Loom from CSM	90-sec video: "Here's what happens next"
1	Kit Tracking	Edgecore/WiBUZ	Share tracking link	Email: Hardware ETA + prep checklist
2	Kickoff Scheduling	WiBUZ CS	Calendar invite for Day 5	30-min "Kickoff & Configuration" call
3	Pre-Work Assignment	WiBUZ CS	Send onboarding questionnaire	Form: Target site, existing gear, billing system



PHASE GOAL

**Eliminate buyer's remorse,
establish momentum,
create psychological
investment.**

PHASE 1: PRE-WORK QUESTIONNAIRE

"Help us help you deploy faster"

01 What's your first target deployment site?

(Type: MDU / SMB / Hospitality / Education)

02 How many APs do you anticipate for this site?

03 What legacy equipment exists today?

(Ruckus / Meraki / Aruba / Ubiquiti / None)

04 What's your current billing/PSA platform?

(ConnectWise / Autotask / HaloPSA / Other)

05 Who will be your technical lead for this trial?

(Name + Email + Phone)

06 What does success look like in 30 days?

(Open text)

07 Any hard deadlines we should know about?

PHASE 1: WELCOME EMAIL SEQUENCE

DAY 0

"Your OpenWiFi Journey Starts Now"

Subject: Your Edgecore/wibipOS Trial Kit is on its way 🚀

- Welcome to the OpenWiFi movement
- **Timeline Overview:**
Kit Ships → Kickoff → First AP → First Invoice
- **Key Ask:** Complete the [Pre-Work Questionnaire](#) to tailor onboarding

DAY 2

"Your Kit Ships Tomorrow—Here's How to Prep"

Subject: Prep checklist before your kit arrives

- Identify your first deployment site
- Confirm PoE switch or injector is ready
- Ensure site has internet backhaul
- **Reminder:** Kickoff call scheduled for Day 5

PHASE 1: SUCCESS METRICS

QUESTIONNAIRE COMPLETION

>80%

■ Form submission before Day 5

KICKOFF CALL ATTENDANCE

>95%

■ Calendar show rate

TIME TO FIRST CSM CONTACT

<24 hrs

■ CRM timestamp

MSP ENGAGEMENT SCORE

3+

■ Interactions (Email, Video, Form)

PHASE

02

Days 4-10

CONFIGURE

| *"It works—I can see my network in wibipOS"*

OBJECTIVE

Technical activation—MSP sees Edgecore hardware in wibipOS dashboard, understands basic operations.

MSP EMOTIONAL STATE

Focused, task-oriented. Wants to see technology work before betting customer relationship on it.

PHASE 2: TOUCHPOINTS & ACTIONS

DAYS 4-10

DAY	TOUCHPOINT	OWNER	ACTION	DELIVERABLE
4	Kit Arrives	Edgecore Logistics	Delivery confirmation	Email: "Your kit has arrived" + unboxing guide
5	Kickoff Call	WiBUZ CS	30-min configuration walkthrough	Recording + action items
5	wibipOS Account	WiBUZ (auto)	Tenant created, credentials sent	Email: Login credentials + quick start guide
6	First AP Online	MSP (guided)	CSM available via Slack/chat	Celebration: 🎉 First AP connected!"
7	Config Checkpoint	WiBUZ CS	Async check-in	Loom video: "I see your AP—here's what to do next"
10	Tech Validation Call	WiBUZ CS	20-min "Is everything working?"	Checklist sign-off

KICKOFF CALL AGENDA

DAY 5

2 min Introductions + confirm goals from questionnaire

5 min wibipOS dashboard tour—where to find what

10 min Live: Add first AP to wibipOS (screen share)

5 min Explain: **NetExperience controller integration** (if applicable)

3 min Discuss: **Target deployment site**—timeline and requirements

5 min Q&A + confirm next checkpoint



CALL LOGISTICS

Duration: 30 minutes

Attendees: MSP Technical Lead, WiBUZ CSM, MSP Owner (Optional)

GUIDED CONFIGURATION CHECKLIST

PHASE 2

-
- | | |
|--|--|
| <input type="checkbox"/> Step 1: Unbox and power AP
Use PoE switch or injector. Check LED status. | <input type="checkbox"/> Step 5: Create first SSID
Best practice: Start with simple WPA2-PSK for testing. |
| <input type="checkbox"/> Step 2: Connect to internet
Connect AP to internet backhaul. DHCP recommended for trial. | <input type="checkbox"/> Step 6: Connect test device
Verify internet access works. Verify device appears in client list. |
| <input type="checkbox"/> Step 3: Auto-registration
AP auto-registers to wibipOS (Expected time: 2-5 minutes). | <input type="checkbox"/> Step 7: Notify your CSM
Message in Slack/email: "First AP online!" |
| <input type="checkbox"/> Step 4: Verify in dashboard
Navigate to Devices → Access Points. Confirm Status = "Online" . | |

PHASE 2: SUCCESS METRICS

TIME TO FIRST AP ONLINE

<72 hrs

- From kit delivery

CONFIG CHECKLIST COMPLETION

100%

- Checklist sign-off

VALIDATION CALL ATTENDANCE

>90%

- Calendar show rate

SUPPORT TICKETS

<2

- Per MSP during phase

CSM ENGAGEMENT

3+

- Async touches (Slack/Email)

PHASE

03

Days 11-20

CONNECT

| *"It's live—real users on a real network"*

OBJECTIVE

First production deployment at MSP's customer site. Real users, real traffic, real stakes.

MSP EMOTIONAL STATE


Nervous but committed. This is where they're putting their reputation on the line with their customer.

PHASE 3: TOUCHPOINTS & ACTIONS

DAYS 11-20

DAY	TOUCHPOINT	OWNER	ACTION	DELIVERABLE
11	Deployment Planning	WiBUZ CS	30-min site planning session	<i>Deployment plan document</i>
12-15	Site Preparation	MSP (supported)	CSM on standby for questions	<i>Async support via Slack</i>
14	Pre-Deploy Checklist	WiBUZ CS	Send verification checklist	<i>Checklist: Site readiness</i>
16-18	Go-Live Support	WiBUZ CS	Live support during deployment	<i>Screen share / phone available</i>
18	First Users Connected	MSP	Confirm real traffic flowing	<i>Dashboard screenshot + celebration</i>
20	Post-Deploy Review	WiBUZ CS	20-min call: What worked, what didn't	<i>Lessons learned doc</i>

PHASE 3: SUCCESS METRICS

<div>DAYS TO PRODUCTION</div> <div><10</div> <div><ul style="list-style-type: none">From Phase 2 completion</div>	<div>GO-LIVE SUCCESS RATE</div> <div>>90%</div> <div><ul style="list-style-type: none">No critical issues</div>	<div>CONNECTED DEVICES</div> <div>>10</div> <div><ul style="list-style-type: none">First 48 hours</div>
<div>MSP SATISFACTION</div> <div>>8/10</div> <div><ul style="list-style-type: none">Post-deployment survey</div>	<div>CSM SUPPORT TIME</div> <div><4 hrs</div> <div><ul style="list-style-type: none">Go-live support</div>	<div><div>CONNECT</div><div>PHASE: PRODUCTION DEPLOYMENT & REAL TRAFFIC</div></div>

PHASE

04

Days 21-30

COMMERCIALIZE

| *"I got paid—this is a real business"*

OBJECTIVE

MSP generates first revenue from wibipOS-managed network. The "first value" milestone.

MSP EMOTIONAL STATE

Validation-seeking. They need to see ROI to justify expanding.

PHASE 4: TOUCHPOINTS & ACTIONS

DAYS 21-30

DAY	TOUCHPOINT	OWNER	ACTION	DELIVERABLE
21	Billing Integration Call	WiBUZ CS	30-min integration setup	<i>Connected billing system</i>
22-25	Invoice Configuration	MSP (guided)	Set up subscriber billing	<i>First invoice template</i>
26	First Invoice Sent	MSP	Generate and send first bill	<i>Screenshot of sent invoice</i>
28	Revenue Confirmation	MSP	Confirm payment received	<i>"First dollar" celebration</i>
30	Business Review Call	WiBUZ CS + Sales	45-min expansion discussion	<i>ROI summary + expansion proposal</i>

PHASE 4: SUCCESS METRICS

BILLING INTEGRATION

100%

- System connection confirmed

FIRST INVOICE GENERATED

100%

- Screenshot confirmation

TIME TO FIRST REVENUE

<14 days

- From go-live date

BUSINESS REVIEW ATTENDANCE

100%

- MSP Owner present

TRIAL-TO-EXPANSION

>60%

- Commitment at Day 30

PHASE

05

Day 31+

CHAMPION

| *"I'm sold—let me tell others"*

OBJECTIVE

Convert successful MSP into advocate, reference customer, and expansion opportunity.

MSP EMOTIONAL STATE

Confident and proud. They took a risk on OpenWiFi and won.

PHASE 5: TOUCHPOINTS & ACTIONS

DAY 31+

TIME	TOUCHPOINT	OWNER	ACTION	DELIVERABLE
Day 31	Expansion Proposal	WiBUZ Sales	Formal pricing for scale	<i>Contract/proposal</i>
Day 35	NPS Survey	WiBUZ (auto)	Measure satisfaction	<i>NPS score + comments</i>
Day 40	Case Study Request	WiBUZ Marketing	Request participation	<i>Case study interview scheduled</i>
Day 45	Reference Program	WiBUZ CS	Invite to reference pool	<i>Reference agreement</i>
Ongoing	QBR	WiBUZ CS	Ongoing success planning	<i>Updated success plan</i>

PHASE 5: SUCCESS METRICS

<div>NPS SCORE</div> <div>>50</div> <div>■ Survey average</div>	<div>EXPANSION RATE</div> <div>>40%</div> <div>■ Within 90 days</div>	<div>CASE STUDY PARTICIPATION</div> <div>>30%</div> <div>■ Of total trials</div>
<div>REFERENCE AVAILABILITY</div> <div>>50%</div> <div>■ Willing to take calls</div>	<div>QBR ATTENDANCE</div> <div>>80%</div> <div>■ Calendar show rate</div>	

— THE MSP OWNER WHO TEXTS YOU ON DAY 30

Just got paid for my first OpenWiFi deployment. My Meraki rep called asking why I didn't renew. **~~Told him I don't need him anymore.~~** Thanks for believing in us.

| That's the moment this journey is designed to create.