Implementing and Onboarding with Katana Cloud Inventory

Table of contents

katana

When businesses choose Katana Cloud Inventory

Thousands of SMBs upgraded to Katana Cloud Inventory from inefficient spreadsheets and out-of-date ERP systems because switching to us allowed them to:

- Manage increasing inventory levels
- Increase sales volume and locations
- Implement omnichannel selling strategies
- Manage both inventory and production in one place
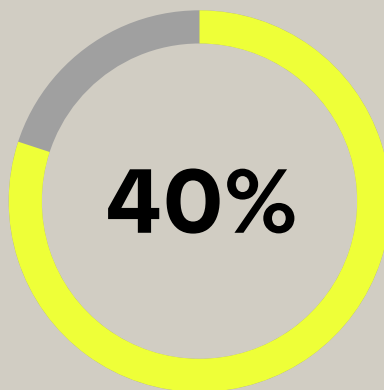- Integrate their favorite tools and create an ecosystem

★★★★★ xero

★★★★★ Capterra

★★★★★ shopify
STAFF PICK

★★★★★ quickbooks

★★★★★ GetApp

A little bit about Katana's customers

$2b

40%

4.8/5
★★★★★

Total processed revenue from sales in 2023

Customers connected to QBO or Xero

Average customer rating

Key highlights of the onboarding experience with Katana

- Personalized workflow from your **dedicated Onboarding Manager**

- If you have fully implemented, you are **7x more likely to scale** your business than those who have only partially implemented

- 50% of businesses are set up and fully onboarded within 3 months — **25% faster than the industry standard**

- Assistance with setting up and configuring your account to fit your workflow processes

The onboarding process is mandatory for subscribers of the Standard, Professional, and Professional Plus plans, with a one-time fee starting from $999, based on the selected plan.

Your personalized onboarding experience with Katana

We want to help you get the most out of Katana Cloud Inventory. To achieve this, we give everyone on the Standard, Professional, and Professional Plus plans a guided onboarding experience, with comprehensive support to guarantee a seamless implementation process customized to meet your unique requirements.

Here's what you can expect to be included in your onboarding experience:

- A dedicated Onboarding Manager guiding you through every step

- A personalized workflow design based on your unique business processes

- Expert data migration and account configuration support

- A dedicated Customer Success Manager after onboarding is complete

"The support is friendly and helpful, and the training videos are really well-presented and easy to follow. Overall, it was a really good software implementation experience. The integration with Xero was completely straightforward and worked like a charm."

Rowena J, Furniture manufacturing

How onboarding with Katana works

1 ENROLLMENT AND SETUP

Onboarding program enrollment
You'll be enrolled in the onboarding program, where you'll benefit from faster setup times and improved chances of long-term success.

Account setup and workflow definition
Up to 10 hours of individualized guidance are provided to set up your account, define any necessary steps, and establish efficient workflows.

2 DEDICATED ONBOARDING MANAGER

Personalized guidance
Each customer is assigned a dedicated onboarding manager providing guidance through live calls, emails, and learning materials.

3 COACHING AND ASSISTANCE

Workflow and data structure coaching
We'll provide you assistance to help you easily align Katana's data and workflow setup with your business goals and operations.

Data migration guidance
Get expert advice on optimizing data migration and configuring your Katana account.

4 SUPPORT AND RESOURCES

Additional support
Get access to Katana's support team, partner network, video academy, and Knowledge Base.

Integration help
Technical guidance on configuring integrations between Katana and other software like ecommerce and accounting tools.

5 POST-ONBOARDING SUPPORT

Ongoing personalized support
Continuous support from the Katana support team and a dedicated point of contact for ongoing assistance.

"The user interface is clean and intuitive, requiring no learning time. Some of the other MRP solutions we tried were difficult to navigate and use, and training on them would have been labor-intensive and costly. Katana is beautifully designed, and the batch-tracking and inventory management are easy to adapt to our business (MRPeasy/ ERPAG were very clearly not designed with food manufacturing in mind, so making them even remotely functional for that purpose felt like a bit of a fool's errand, whereas Katana just works)."
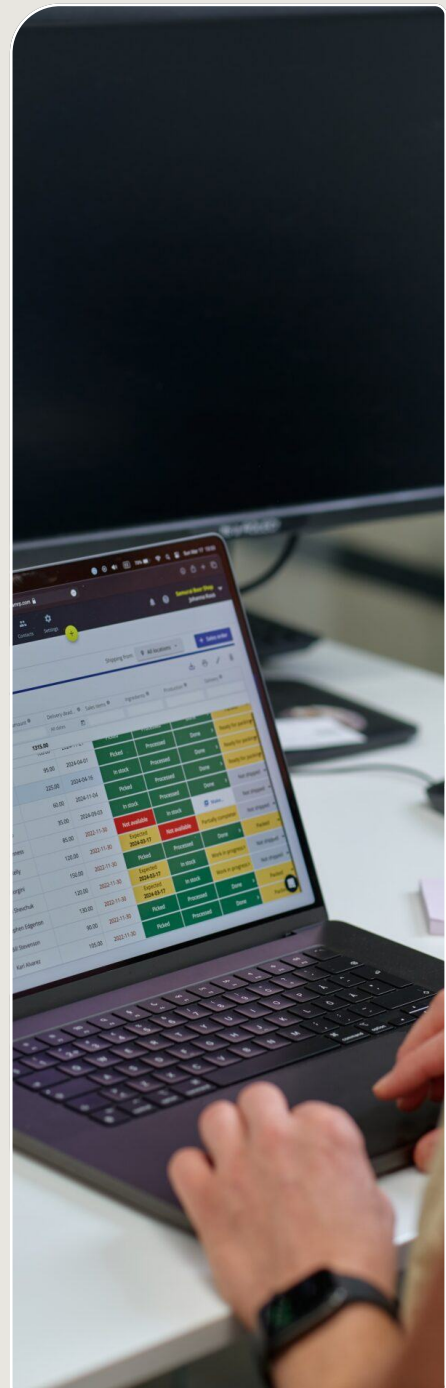
Rebecca R, Food and beverage industry

What a typical onboarding experience looks like

The onboarding process is tailored to each customer's industry and business needs. So, for that reason, the onboarding experience you'll receive will be entirely different from what another receives.
Here's a typical onboarding agenda and timeline:

Day 1

Introduction to Katana, review of existing workflows, and uploading products and materials.

Day 4

Optimizing production and workflows, including preparing for a stocktake.

Day 7

Live check-in for operational fine-tuning.

Day 12

Refining inventory setup, including a review of product and material uploaded and bill of materials (BOM)/product recipes.

Day 30

Finalizing integrations and enhancing operations.

Day 45

Onboarding graduation and introduction to your Customer Success Manager.

"We were developing a new cloud-based software stack for all operations. Overall, we were able to implement Katana as the central point for our entire software stack. Each piece of software gets its orders and data from Katana. Normally, I would be hesitant to put any of the software that small businesses see on a daily basis into this important position, but I had no issue putting Katana into this position."

Jason C, Medical devices

katana

Get started with a personalized demo

Schedule a call with a product expert for a detailed overview on how Katana can help your business — from the features you you need to building an integrated tech stack to optimize inventory, sales, and financial processes.

Book a free consultation

katana

Sales orders

	Stock	Materials	Production	Delivery
eBay	✓	✓	✳	
Amazon	✳	✓	✓	✳
BigCommerce	✳	✓	✓	✳
Shopify	✳	✕	+	

Multi-channel sales order delivery