Project Kickoff

Brief Overview

The Project Kickoff is the first stage of deploying WalkMe on your site. Your Digital Adoption Consultant (DAC) will contact you and schedule a meeting to discuss your business challenges and objectives. This stage is about gathering relevant information from you so your DAC can develop a tailored solution for your needs.

After this initial meeting, you will have a call with your DAC. In this call, your DAC works with you to identify business challenges or problem areas of your site. Business challenges are then grouped into use cases, which help the DAC hone in on solutions that may be the most relevant to you. your DAC also works with you to establish Key Performance Indicators in order to measure the impact WalkMe has on problem areas. Finally, be prepared to provide important information about your sites, such as site credentials, user information, and potential technical difficulties.

How It Works

Before the Project Kickoff, you have the Account Kickoff, this is the first meeting between you and your Account Manager (AM). The goal of this initial meeting is to align with your Account Manager on how your WalkMe initiative aligns with the goals of your department and the larger organization. Your AM will also outline WalkMe's project methodology so you know what to expect for the rest of onboarding.

After this introductory meeting, the Kickoff call is the first meeting you will have directly with your DAC. They have been previously briefed by our sales team but will use this time to gather more details on your specific challenges. The purpose of this call is to establish a clear use case and clarify your business objectives.

Use Cases

- **Conversion:** In this use case, your focus is on conversion, and providing a seamless experience to improve brand loyalty. [Read more about this use case in our Case Studies.](#)
- **Onboarding / Training:** This use case is about accelerating employee time to competence with onboarding and training. [Read more about this use case in our Case Studies.](#)
- **Customer Care / Support:** In this use case, your focus is ensuring customers have a simple, smooth and burden-free online experience to dramatically reduces the number of incoming support requests. [Read more about this use case in our Case Studies.](#)
- **Feature Adoption / Change Management:** This use case is about introducing new features, accelerating the adoption of new processes, and reducing support costs. [Read more about this use case in our Case Studies.](#)

Questions To Think About:

- What are your biggest pain points?
- How do you currently offer support?
- How do you currently provide training?
- Who are your users?

Who To Invite To Kickoff

You will be asked to invite a few colleagues to your Kickoff, each with a different role:

- **The Decision Maker:** Invite someone who has the final say on approving the WalkMe solution your DAC will provide. They can provide important context to what your organization is trying to achieve.
- **Technical Resource/ IT:** Invite someone from your development team that has access to your site's code. This individual can inform the WalkMe team of any technical roadblocks and advise on the best deployment method.
- **WalkMe Builder:** Be sure to include the person who will eventually build a WalkMe solution within the editor. The sooner they are involved in the process, the smoother the build will be. If you have allocated (purchased) SE Build hours, then our Solution Engineers team takes care of all the building, but having your future WalkMe Builder attend gives them the opportunity to learn about the process. To help get your Builder started we offer online courses and a certification program at the Digital Adoption Institute.