WalkMe Onboarding Process Overview

Brief Overview

Welcome on board, we are excited to start your WalkMe journey together with you!

From kickoff to go-live everything you need to know about your journey is summed up here in four main stages. To learn more about them, take a deep dive into each section.

To ensure our customers receive a world-class support experience that is tailored for them, our experts are there as your consistent point of contact.

Take a glimpse at the services available to you as a WalkMe customer

1. Project Kickoff

You'll begin your journey with an introductory Account Kickoff call with your Account Manager (AM). The goal of this initial meeting is to align with your AM 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 initial meeting, you will have a call to meet your Digital Adoption Consultant (DAC) to discuss your project more in-depth. The purpose of this call is to clarify your business objectives, timelines, meeting cadence, and other general project governance for the rest of your onboarding process. This will enable your DAC to create a tailored solution that meets your needs. At this stage in the process, you'll also select a deployment method and discuss the different options available with our team. The best way to prepare for a Kickoff Call is to discuss internally what your business objectives are. Consider which metrics you'd like to improve, and note down any technical difficulty concerns you have with implementing WalkMe on your site. Read more about Project Kickoff.

2. Solutioning

In this stage of the process, your DAC will use their UX expertise and work with you to imagine and create a solution plan that will help improve the challenges identified during the Kick-off stage. The use case and business objectives will guide this vision. This vision goes beyond the process instruction and utilizes our proven best practices to provide engagement and contextual support.

In order to craft a comprehensive solution, your DAC will ask about the specific processes, user roles, challenges, areas, and content that is relevant to your business objectives. The solutioning phase may require more than one meeting depending on the complexity of the business objective. At the end of the solutioning phase, your DAC will present you with an outline of a complete solution. Read more about Solutioning.

3. Building and Implementing

The time has finally arrived to start building! your DAC will get your approval on the proposed solution. They will demonstrate how this solution will affect your KPIs. Once the solution has been agreed upon, your builder can get started with creating the solution! Otherwise, if you have allocated (purchased) SE Build hours, our Solution Engineers (SE) team will get to work on building out your implementation. You may go through multiple review cycles with our SE team in order to tailor it to your specifications. Once approved, your project will be sent to our Quality Assurance (QA) Team for testing to ensure the strongest possible build. Read more about Implementation.

4. Go Live

In the final phase of your implementation, you will deploy your solution by publishing your WalkMe items. Two weeks after your initial deployment, your DAC will be in touch to review WalkMe Analytics data and ensure that your solution is functioning as planned. Your DAC may suggest some modifications based on the data in an iterative process. After this post go-live meeting with your DAC, your services engagement will be complete, and your AM will step back in as your primary point of contact. At this stage, your AM will help consult and recommend new phases for your implementation that drive meaningful outcomes for your business. Read more about Go Live.