

Onboarding Journey Overview

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Userlane's onboarding methodology ensures fast time-to-value, a structured implementation experience, and sustained software adoption. This structured, multi-phase approach is guided by a dedicated Customer Value Manager and supported by onboarding specialists and technical consultants to ensure all stakeholders are aligned on objectives, implementation, and success outcomes.

The Setup and Onboarding package includes the following services.

Phase 1: Project Initiation and Technical Setup	
Kick-off workshop	Conduct a remote session to assess requirements, define success criteria, align on project goals, schedule, and scope.
Technical setup	Coordination with Customer IT to deploy the Userlane Browser Extension and/or Snippet, including SSO if applicable. Includes one (1) technical planning session and one (1) testing session.
Userlane training	Provision of access to Userlane's e-learning content and best practices material, supported by one (1) expert-led sessions where needed.
Phase 2: Success Plan, Content, Testing	
Success plan definition	Planning and consulting call focused on content strategy, analytics structure, and audience segmentation.
Go-Live planning & support	High-touch support for up to three (3) weeks, with up to two (2) 30-minute remote sessions per week. Designed to facilitate a smooth launch and user adoption.
Phase 3: Go-Live & Hypercare	
Go-Live & Hypercare	High-touch support for one (1) week, with up to two (2) 30-minute remote sessions. Designed to facilitate a smooth launch and user adoption.

Userlane and certified Userlane Partners offer additional services upon request. If you are interested, please ask your Userlane contact for more details.
