Implementation & Onboarding

Implementation

All customers are assigned a member of the ObservePoint Customer Success team to guide them through the initial implementation process.

This includes a kick-off call where support and training resources are highlighted for technical questions and self-enablement.

Here's what you can do to ensure that implementation is fast and effective:

- ☑ Provide a list of all domains that should be in scope
- ☑ Bring a tagging plan (e.g. SDR), if that is relevant to your use cases
- ☑ Prepare a list of approved and/or categorized cookies/tags, if you are using ObservePoint for Privacy Compliance testing
- ☑ Obtain test credentials, if you plan to use ObservePoint Journeys that will need credentials to get past certain parts of your site (e.g. login, checkout)

After you begin to use the platform, we expect questions and feedback will arise, and our Customer Success and Technical Support teams will be eager to respond to you.

Standard Onboarding

- **1 Kickoff and Enablement Call**
  The training session will be a walkthrough of the ObservePoint platform

- **1 Hands-On Workshop Session**
  All customers, along with the initial kickoff call, will have a second check-in call, where an ObservePoint representative will answer any questions that a customer may have since starting onboarding. This call can also be used as a training or workshop, as needed.

Premium Onboarding

Customers can purchase optional Premium Onboarding to accelerate your implementation, including:

- **3 Training Sessions which includes:**
  - Audits
  - Journeys
  - Standards

- **1 Hands-On Workshop Session**
  The workshop session will be an opportunity to work in the platform with the assistance of an ObservePoint Onboarding & Implementation Manager

- **Guaranteed weekly and ad hoc support as needed, for up to 6 weeks total**

- **Assisted creation of 2 Audits and 2 Journeys, all with customer-defined Standards applied**