

Onboarding Life Cycle: Integration to Go Live



PHASE 1

PHASE 1



Technical Integration

- Introduction of development engineers from all parties
- Development engineers start technical integration

4-6 weeks



Kickoff Call

- Introduction of additional project contributors
- Discuss target go-live date
- Outline process and timeline leading to go live

1-hour session

ATTENDEES

ID.me: Engineering
Partner: Engineering, Project Manager

ATTENDEES

ID.me: Engineering, Customer Success Manager
Partner: Engineering, Project Manager, and Additional Project Contributors (as required)

PHASE 2

PHASE 2



Technical Integration

- Technical integration continues

4-6 weeks



Onboarding Resources

- Develop onboarding plan for:
 - Providers
 - Partner internal teams
- Review available resources
- Identify additional needs

1-hour marketing and communications introductory session; 1-3 weeks for completion



Communication Strategy

- Develop communication plan to:
 - Providers (e.g., email, blog post)
 - Partner internal parties (e.g., newsletter)
- Review planned communication timeline for each respective group

1-hour marketing and communications introductory session; 1-3 weeks for completion

ATTENDEES

ID.me: Engineering
Partner: Engineering

ATTENDEES

ID.me: Customer Success Manager
Partner: Project Manager, Onboarding / Implementation Team

ATTENDEES

ID.me: Customer Success Manager
Partner: Project Manager, Onboarding / Implementation Team

PHASE 3

PHASE 3



QA Screenshare

- Milestone: Workflow Review – Staging**
- Following successful technical integration, engineers from all parties complete a quality assurance (QA) check of the coordinated end-to-end workflow(s) in the staging environment
- Partner will present screen to showcase workflow(s)
- Repeat workflow review in staging until workflow(s) are successful

30 minutes per screenshare session; repeat as required until successful



Onboarding Resources

- Milestone: Onboarding Resources – Finalized**
- Finalize onboarding plan for:
 - Providers
 - Partner internal teams
- Review and finalize created resources

30-minute session to review finalized resources, as required



Communication Strategy

- Milestone: Communication Strategy – Finalized**
- Finalize communication strategy to:
 - Providers
 - Partner internal parties
- Review and finalize communication plan

30-minute session to review finalized resources, as required



Support Process

- ID.me learns the partner's current support model
- ID.me explains their support model and how a relationship between the ID.me and partner support teams work

1-hour session

ATTENDEES

ID.me: Engineering, Customer Success Manager
Partner: Engineering, Project Manager

ATTENDEES

ID.me: Customer Success Manager
Partner: Project Manager, Implementation Team Lead

ATTENDEES

ID.me: Customer Success Manager, Implementation Team Lead
Partner: Project Manager, Implementation Team Lead

ATTENDEES

ID.me: Customer Success Manager, Member Support Team Lead
Partner: Project Manager, Customer Support Team Lead

PHASE 4

PHASE 4



Pilot Week

- Milestone: Workflow Review – Production**
- The Pilot week exists to test workflow(s) in production and offer all parties insight into the end-user experience
- Licensed providers (recruited by the partner) will complete the full end-to-end user journey in production to test the functionality of the partner to ID.me to partner workflow
- Encourage up to 1% of your providers be recruited to participate in initial testing
- Final opportunity for troubleshooting
- Repeat Pilot as needed, until successful

1-hour per provider test session



Support Process

- Milestone: Support Process – Finalized**
- Finalize support model for how partner's support team will hand off providers that need ID.me assistance

30-minute session, as required



Team Trainings

- ID.me and partner-led training of partner's implementation and customer support teams to ensure understanding of workflow and agreed upon support / troubleshooting process
- ID.me to ensure their member support team is trained on finalized workflows / support process

1-hour sessions, as required by partner to meet internal team needs

ATTENDEES

ID.me: Engineering, Customer Success Manager, Member Support Team Lead
Partner: Engineering, Project Manager, Implementation Team Lead, Customer Support Team Lead, Licensed Health Care Provider(s)

ATTENDEES

ID.me: Customer Success Manager, Member Support Team Lead
Partner: Project Manager, Customer Support Team Lead

ATTENDEES

ID.me: Customer Success Manager, Member Support Team Lead
Partner: Project Manager, Implementation Team, Customer Support Team Lead

PHASE 5

PHASE 5



Go Live

- Launch of partner and ID.me workflow in production
- Begin advertising to end users based on agreed upon communications strategy

ATTENDEES

ID.me: Engineering, Customer Success Manager, Member Support Team
Partner: Engineering, Project Manager, Implementation Team, Customer Support Team

PHASE 6

PHASE 6



Post-Go Live Check-In

- First call will be scheduled no later than one week post-go live. Additional calls will be scheduled between all teams as needed
- Check-ins serve to maintain an open line of communication to enable efficient follow up on necessary adjustments

One 30-minute session per week for the first 4-6 weeks post-go live; evaluate frequency thereafter

ATTENDEES

ID.me: Customer Success Manager
Partner: Project Manager



The time it takes from the start of integration to go live for a high-assurance identity proofing workflow depends on the partner's timeline, need, and resource availability, but typically ranges between 4-6 weeks. ID.me's onboarding process consists of six phases that must be accomplished before Go Live.