

TrustLayer Onboarding Process



The onboarding process begins with a **kick-off call** where key stakeholders are introduced and your TrustLayer Customer Success Manager learns more about your business. During the call, pertinent details about the implementation will be discussed such as: Number of parties to be tracked, insurance requirements, and other aspects about the business.

If document migration is required, TrustLayer will upload the provided data onto the platform during the **data import** phase; which will be confirmed on the **Data Approval Call**. Once all the data is uploaded and approved, full **platform training** for all necessary staff will take place. When your team is ready, a **Go Live** call will end the onboarding process.



Teams meet, TL gathers data, timelines & deliverables are set.

Onboarding Kick-off Call

(Scheduling of the Kick-off call begins 1-2 days after agreements are finalized)



TL receives / uploads data, sets up & configures platform.

Data Import

(Data import timelines vary based on amount of data; typically 1-3 weeks)



Data and platform configuration are presented for approval.

Data Approval Call

(Data Approval Call is scheduled once data import & config are done)



All necessary staff are trained on platform use and best practices.

Platform Training

(Platform training is scheduled at the end of the Data Approval Call)



All necessary staff are fully trained and ready to Go Live.

GO LIVE

(Go Live call typically takes place 1 week after platform training)