

Implementation Process



Our team of experts will bring you knowledge and guidance so you can build trees and Go Live with confidence.

We guide you from project startup to go-live

We know how complicated it can be to deal with a new product on your own. With Zingtree, you won't be left to your own devices once the contract is signed. We'll conduct weekly meetings to get you live.



What's included with the implementation process

While you hold the knowledge of your organization's processes, our team brings years of experience in helping thousands of teams implement Zingtree. Our implementation process is designed to transfer our best practices to you so that you can tailor them to your organization.



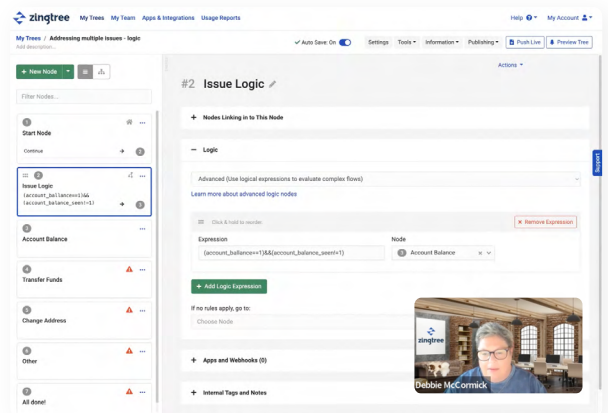
Expert guidance & advisory: We work as an extension of your team, offering training, workshops, and review sessions. You get as many sessions as you need to become an expert in our technology.



1-3 workflows fully live: Once you've published the top 1-3 flows, you can consider your implementation complete. Keep building more trees, realize a quick ROI, and make iterations based on agent feedback.



Desired outcome: We work with you to design an end-to-end solution based on the outcome you want to achieve: a method to track ROI, live trees, or a plan for improving your KPIs.



Implementation Specialist shows how to build more efficient trees with logic nodes

What our customers say

“ I'd previously worked with it so knew how good it was. [At FleetCor], I appointed a Knowledge Architect who builds all our trees. Where help is needed, the support from the Zingtree team has been outstanding. ”

Mike Jennings, Vice President of UK Operations at FleetCor

Example plan

Kick-off	We align on expectations, agenda, and key deliverables. Understand your ecosystem to better tailor your implementation.	45 Min
Zingtree 101	We meet with your authors and give them an intro to Zingtree's authoring tool, best practices, and configuration.	1 Hr
Zingtree Deep Dive	Dive deeper into the enterprise features that will help make your trees more efficient and smarter.	1 Hr
Workshop	We work on your flows together. You will lead and we will follow along, making recommendations along the way.	1 Hr
Tree Review	We review the trees you have built and answer any outstanding questions you may have.	1 Hr
Integration	Share your screen, and we'll walk you through the integration step by step.	1 Hr



After the implementation process, your dedicated Customer Success Manager will conduct bi-weekly check-ins to monitor your progress and answer any questions you might have along the way.

The leaders of the Zingtree implementation team



Guillaume Tarralle | Sr. Director, Customer Experience

Guillaume ("GT") oversees the CX department for everything client related. He's been with Zingtree since 2020 and is obsessed with ensuring you get the most out of Zingtree throughout your customer journey.



Debbie McCormick | Director of Implementation and Education

Debbie has been with Zingtree since 2015 – she oversees the Implementation team that will train, co-build, guide, and provide feedback to your team once your project gets started.

Who should be involved from your team



Project Owner: Coordinates work between your company and Zingtree



At least one author for each flow: Builds trees under Zingtree guidance



QA Tester: Test the flows to make sure you achieve the desired goals



CRM or CCaaS Administrator: Configures Zingtree in your integrated software

Delegate tree building to Zingtree experts

If you don't have the time or desire to build trees on your own, you can request help from our Professional Services team. We will structure your process flows, architect trees, and integrate them with your existing tools for an additional fee.

[Learn More](#)

Let's get started!

Reach out to your Account Executive for any additional information.

zingtree.com