

» rocketlane

THE ~~state~~ FUTURE OF CUSTOMER ONBOARDING 2025



SOCO
2025

Table of Contents

01 _____ 03

Executive summary:

Redefining customer journeys in 2025

02 _____ 07

The state of current onboarding practices:

What's working and what's not

03 _____ 10

Laying the foundation:

Standardization and personalization

04 _____ 14

Onboarding as a revenue driver:

Shaping strategic success

05 _____ 17

Self-serve and partner-led onboarding:

Scaling with agility

06 _____ 21

The role of AI and automation:

Transforming onboarding workflows

07 _____ 25

Customer advocacy:

Turning customers into champions

08 _____ 28

Re-onboarding:

The key to sustained customer success

09 _____ 32

The road ahead:

Trends shaping 2025 and beyond

10 _____ 36

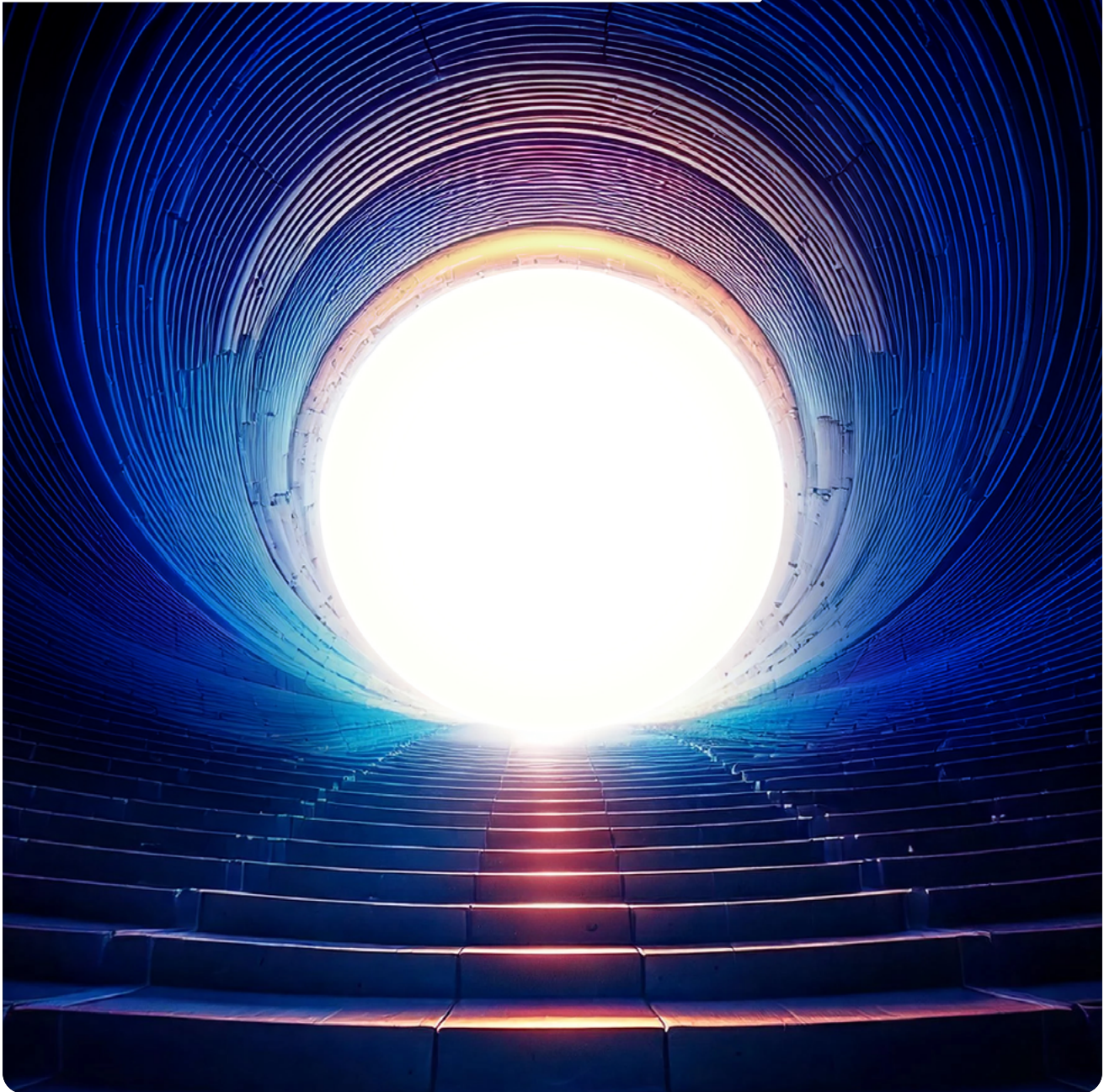
Rocketlane and its uses:

A sneak peek

Executive summary:
Redefining customer
journeys in 2025

CHAPTER

01



Customer onboarding has evolved from being a functional process to a strategic cornerstone of business success. In an era where customers expect personalized experiences and faster time-to-value, onboarding is no longer a “nice-to-have” but a critical differentiator. Think of it as a prime passage to long-term customer loyalty, advocacy, and measurable business outcomes like retention and revenue growth.

The 2025 State of Customer Onboarding Report offers a window into this transformation.

Based on insights from 950+ onboarding and implementation professionals across diverse industries, this year’s findings reveal not just the state of onboarding today but the key trends reshaping its future:

Onboarding as a revenue driver

Companies are increasingly monetizing onboarding and viewing it as a strategic asset. This shift underscores its role in delivering measurable outcomes and driving customer success.

AI and automation take center stage

The adoption of AI and automation is transforming onboarding workflows, enabling teams to identify risks, predict delays, and optimize processes with unprecedented efficiency.

The rise of re-onboarding and continuous education

As AI-powered products and complex solutions become the norm, re-onboarding and ongoing customer education are gaining prominence, ensuring customers continue to derive value over time.

The balance between personalization and standardization

While personalization creates tailored experiences that delight customers, standardization ensures scalability and consistency—both of which are crucial for businesses looking to scale effectively. Striking the balance between them allows companies to provide unique, engaging journeys without sacrificing operational efficiency, ensuring a cohesive and streamlined onboarding experience.

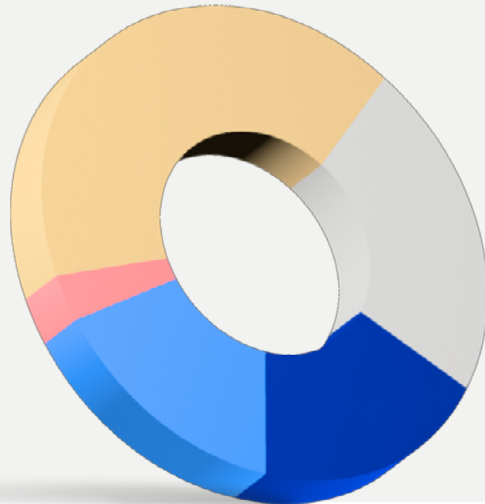
This report goes beyond highlighting challenges; it offers actionable strategies to help businesses embrace innovation and elevate their onboarding game. Whether it's alleviating the strain on overloaded teams, integrating disjointed tools, or leveraging AI to deliver smarter, faster solutions, this report provides a roadmap for the future.



The message is clear: **Onboarding is no longer just a process—it's a strategic function that shapes the entire customer journey.** The insights shared here aim to inspire leaders to rethink, reimagine, and redefine onboarding in 2025 and beyond, making it ***The State Future of Customer Onboarding 2025.***

Know our respondents

18%	VP of Customer Onboarding/ Implementation/ Success
23%	Director of Customer Onboarding/ Implementation/ Success
40%	Customer Onboarding/ Success Manager
16%	Customer Onboarding/ Success Lead
03%	Others



Here are some renowned companies where our respondents work



The state of current onboarding practices: What's working and what's not

CHAPTER
02



Despite its critical importance, customer onboarding remains fraught with challenges that hinder its effectiveness and impact. For many organizations, onboarding is still an uphill battle, marked by inefficiencies, disjointed tools, and a lack of alignment with customer expectations.

Why does it matter?

These challenges are not just operational hurdles; they directly impact customer success, retention, revenue, and advocacy. Without addressing these issues, businesses risk falling behind in a world where onboarding is increasingly seen as a competitive differentiator. Here are four key reasons why businesses might need to reimagine their customer journeys with onboarding at the forefront:

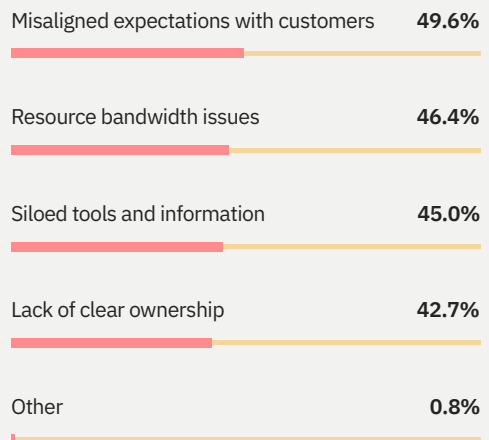
1. Overloaded teams, overlooked opportunities

With growing customer bases and limited resources - often caused by smaller teams or lack of dedicated onboarding specialists - onboarding teams are stretched thin. Survey insights reveal that nearly 46.4% of respondents deal with resource bandwidth issues, and teams are left with very little time to focus on tailored onboardings or strategic planning. The result? Increased employee burnout, delayed customer outcomes, and frustrated customers.

2. Disjointed tools and processes

The reliance on multiple, siloed tools is another pressing issue. From project management and collaboration to communication and analytics, 45% of teams grapple with siloed tools and information, according to our survey. This patchwork approach not only hampers efficiency but also leads to miscommunication and lost data—frustrating internal teams and customers alike.

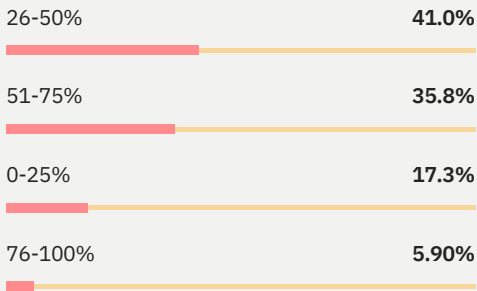
What is the biggest bottleneck in your onboarding process today?



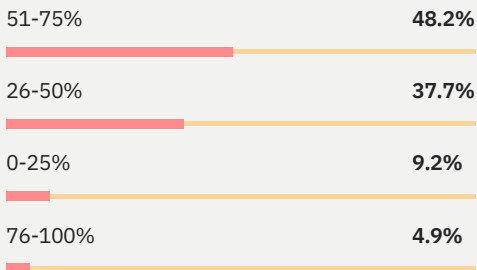
3. Lack of personalization

26-50% of today’s customers expect onboarding experiences tailored to their unique needs. However, 48.2% of organizations admitted to their processes still being largely standardized. While standardization does offer consistency in processes, failing to personalize onboarding journeys can result in unmet expectations, reduced satisfaction, and higher churn rates.

What percentage of your customers prefer personalized onboarding?



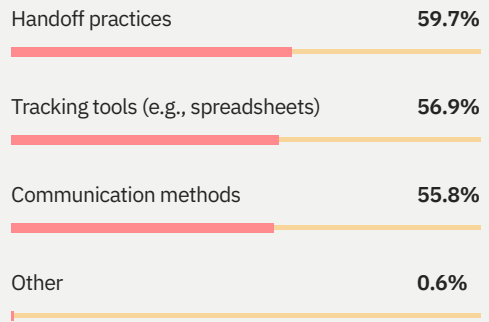
What percentage of your onboarding is standardized today?



4. Inconsistent handoffs between teams

Another recurring, often-overlooked theme is the lack of seamless handoffs between sales, onboarding, and customer success teams. 59.7% of survey respondents highlighted information gaps during handoffs and handoff practices as one aspect of the onboarding process that felt most outdated. When handoffs are not paid attention to, it can lead to inefficiencies and misalignment that could lead to project delays.

Which aspects of your onboarding process feel most outdated?

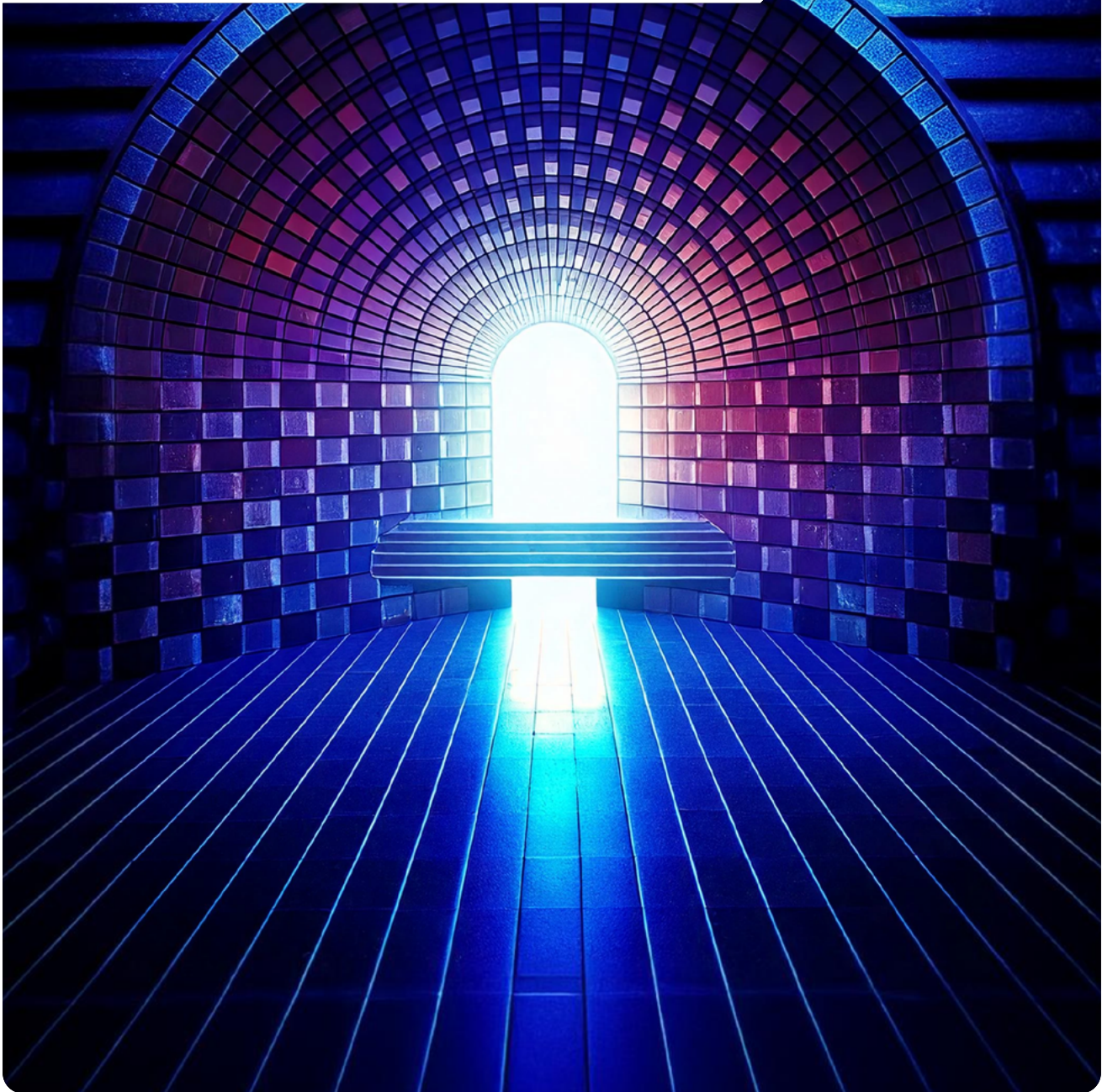


As we explore the future of customer onboarding, it becomes evident that solving these challenges requires more than incremental improvements—it demands a complete rethinking of onboarding strategies, tools, and goals. The next sections delve into how businesses can turn these challenges into opportunities for growth and transformation.

Laying the foundation: Standardization and personalization

CHAPTER

03



Delivering consistent yet tailored onboarding experiences requires a delicate balance between standardization and personalization. At the heart of this transformation lies the ability to integrate onboarding processes seamlessly with an organization’s tech stack, creating a unified foundation for scalability and customer satisfaction.

Standardization - The road to scalability

For businesses to scale effectively, standardization is non-negotiable. Implementing repeatable templates and structured workflows is the way for organizations to ensure consistency across onboarding projects, regardless of complexity or customer segment.

Pre-defined templates for onboarding workflows, customer handoff forms, and project timelines streamline execution while minimizing errors. According to the survey, **44.7% of respondents reported that their biggest challenge in maintaining consistency across onboardings was the lack of templates.** This underscores the impact templates can have on the efficiency of onboarding.

Standardization also ensures smoother collaboration between sales, onboarding, and customer success teams, reducing information silos and enhancing accountability.

What are your biggest challenges in maintaining consistency across onboarding?

74.1%	High variability in customer needs
44.7%	Lack of templates
44.1%	Resource turnover
0.8%	Other

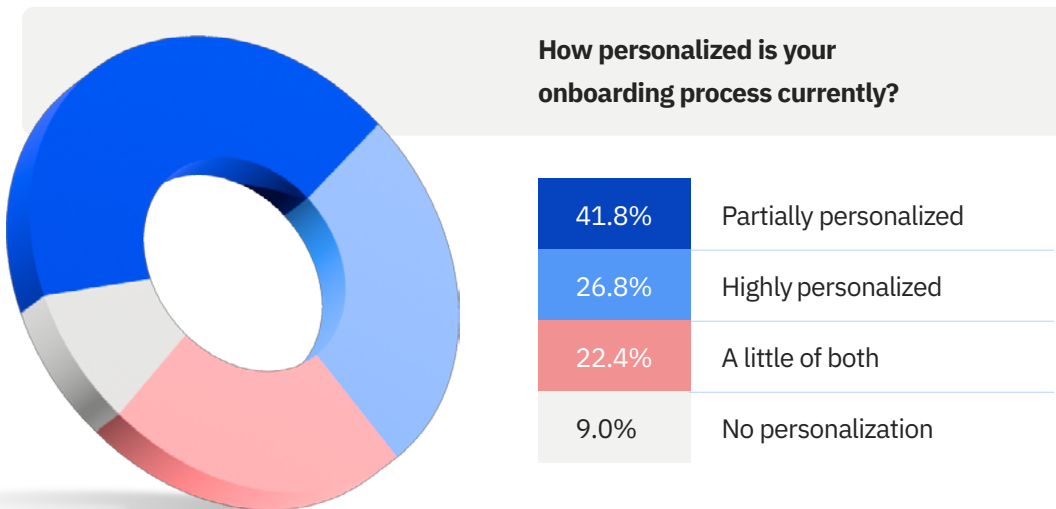


Personalization - Creating exceptional customer journeys

While standardization creates efficiency, personalization ensures customer delight. Tailoring the onboarding journey to meet individual customer needs enhances engagement and fosters loyalty.

Organizations can segment customers based on revenue, user count, or product complexity to deliver experiences that resonate. Aligning with customers on key milestones and success metrics during onboarding also allows them to see immediate value, strengthening trust and commitment.

Survey data reveals that **41.8% of companies are partly personalizing their onboarding processes today**. They have standard templates for each type of customer, but build out the process based on each customer’s unique needs.



As the cherry on the cake, a well-designed, intuitive user interface plays a significant role in shaping customer perception during onboarding. Simple, self-explanatory UX reduces friction and ensures customers remain engaged throughout their journey.

Combining the consistency of standardization and the customer-centricity of personalization helps businesses deliver onboarding experiences that are scalable, engaging, and impactful. This lays the groundwork for operational excellence while ensuring every customer feels valued and supported.

The secret driver of efficiency

A disjointed tech stack is one of the most common challenges facing onboarding teams today. Integrating tools for project management, communication, and analytics into a single cohesive system eliminates inefficiencies and provides full visibility into onboarding progress.

Centralizing onboarding data into a single hub streamlines collaboration, with integrated tools acting as a major efficiency driver. Leveraging existing systems like CRMs, collaboration platforms, and automation tools ensures alignment with broader business objectives. Automation further enhances efficiency by handling repetitive tasks such as assignments, follow-ups, and progress tracking, freeing teams to focus on delivering exceptional value to customers.

Onboarding as a revenue driver: Shaping strategic success

CHAPTER
04



Traditionally viewed as a cost center, customer onboarding has undergone a dramatic transformation over the past few years.

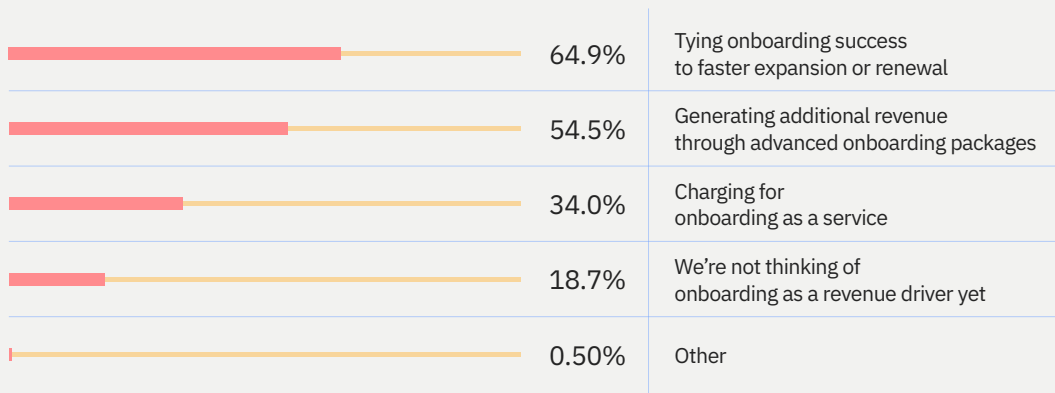
In 2025, onboarding is no longer just about getting customers up and running—it is now recognized as a key driver of revenue, customer retention, and business growth. Survey responses underscore a growing realization among businesses: **onboarding has the potential to unlock long-term value and measurable outcomes.**

Today, businesses are focusing on maximizing the value of their products, fostering stronger customer relationships, and embracing onboarding as a strategic investment—one that directly contributes to their bottom line. They are beginning to:

Monetize their onboardings

Survey insights reveal a significant trend: **54.5% of respondents reported generating additional revenue through advanced onboarding packages as part of their revenue strategy.** This shows that organizations are moving toward pricing onboarding as a premium offering, emphasizing its importance in delivering results like faster time-to-value and seamless adoption. Plus, customers are also more likely to commit to timelines and achieve success early in their journey when they invest in onboarding.

Which aspects of onboarding are tied to your company’s revenue strategy currently?



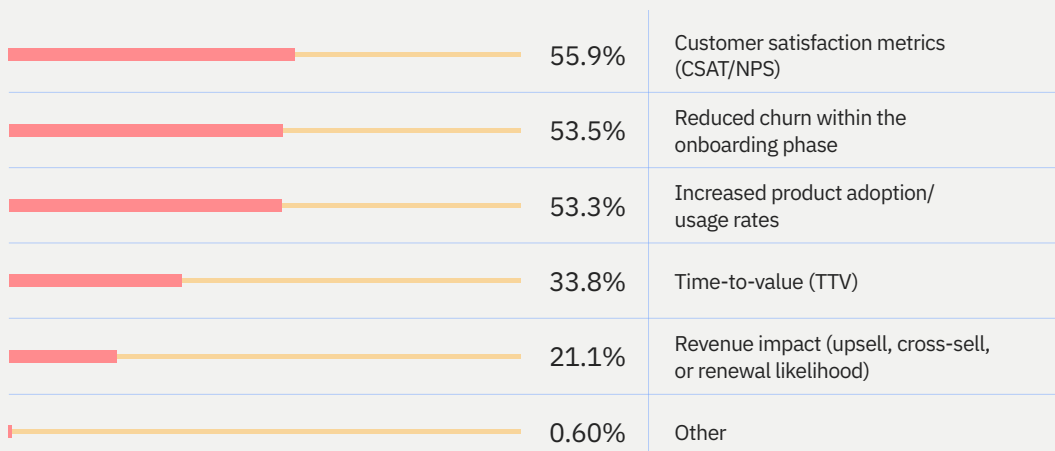
Companies that also charge for onboarding are more likely to see an improvement in implementation timelines, demonstrating that a financial commitment drives customer accountability.

Link customer onboarding to renewals and expansion

The survey also highlights how onboarding is increasingly being tied to key revenue metrics such as renewals and upsells. **64.9% of companies surveyed said that successful onboarding directly impacts their renewal rates**, while **21.1% stated that onboarding quality influenced cross-sell opportunities**.

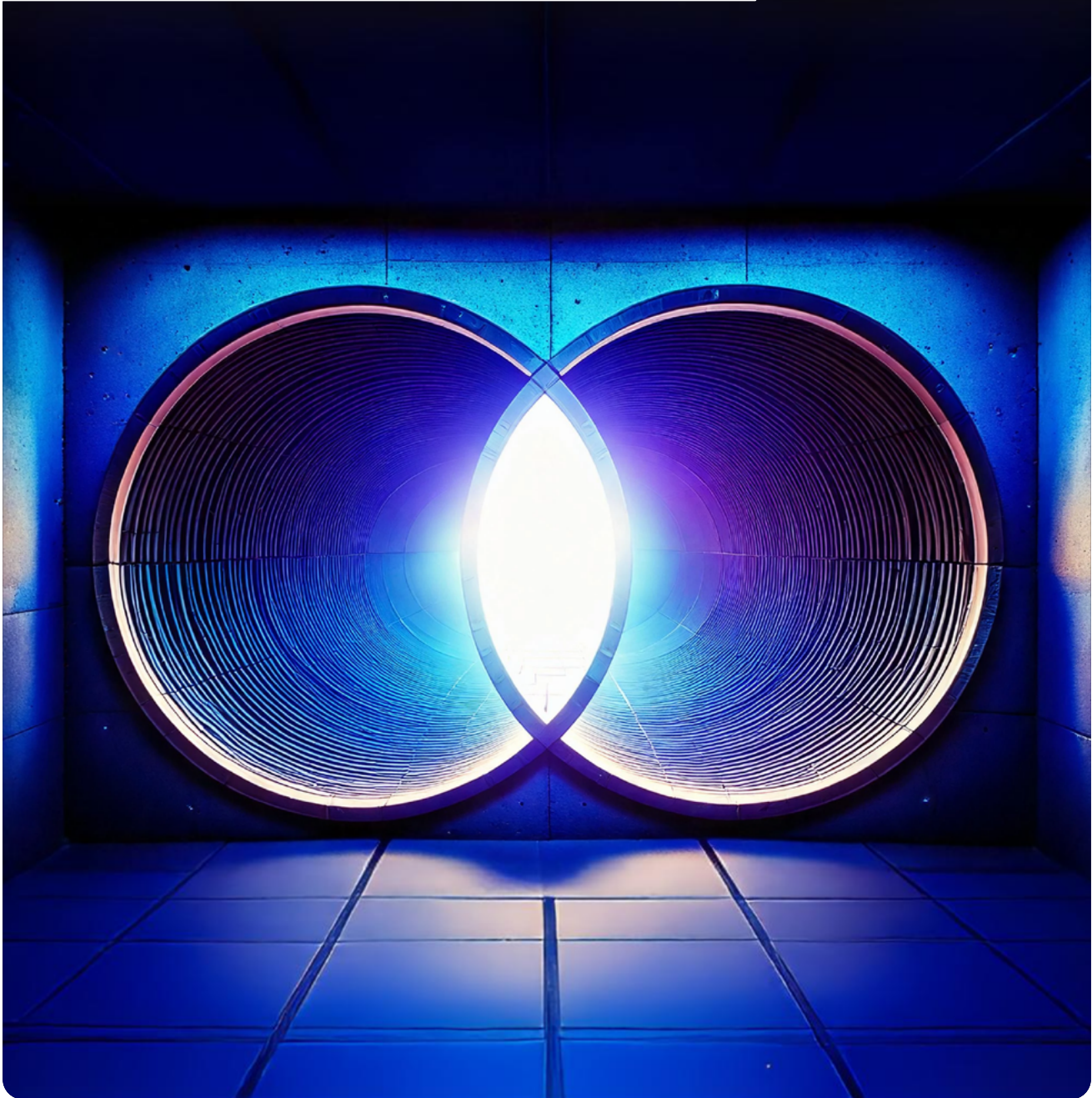
A data point from **our survey shows that customers who had a smooth onboarding experience were 53.5% less likely to churn within the onboarding phase**.

What are the primary outcomes your onboarding process is measured against?



Self-serve and partner-led onboarding: Scaling with agility

CHAPTER
05



As businesses seek to scale their onboarding processes without compromising quality, two models are gaining traction: self-serve onboarding and partner-led onboarding. These approaches not only cater to diverse customer needs but also help companies maintain lean internal teams, increase productivity, and invest more time in high-value activities.

1. Self-serve onboarding: Empowering customers

Self-serve onboarding is designed for customers who prefer independence and flexibility, allowing them to navigate their onboarding journey at their own pace.

Key features of self-serve models include:

- **Interactive guides and tutorials:** Step-by-step instructions embedded within the product guide users through key features and workflows.
- **Knowledge hubs:** Centralized resources, such as FAQs, video libraries, and searchable documentation, enable customers to find answers quickly.
- **AI-assisted support:** Tools like chatbots and automated assistance provide real-time guidance and address common queries.

Companies implementing self-serve onboarding mostly see faster customer adoption and reduced support tickets. For low-touch customers or smaller accounts, self-serve onboarding ensures cost-effective engagement without sacrificing customer satisfaction.

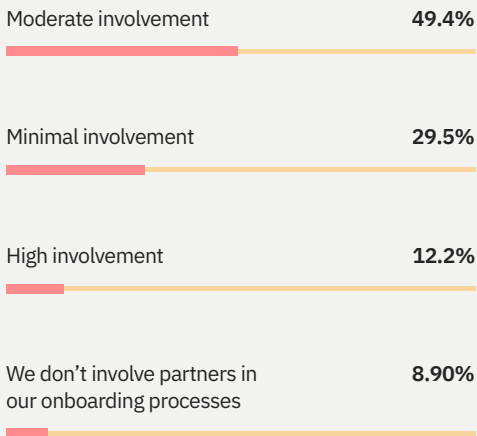
2. Partner-led onboarding: Scaling through collaboration

For businesses handling complex products or large-scale implementations, partnering with external experts can be a game-changer. Partner-led onboarding leverages the expertise of third-party vendors, consultants, or implementation specialists to deliver seamless experiences.

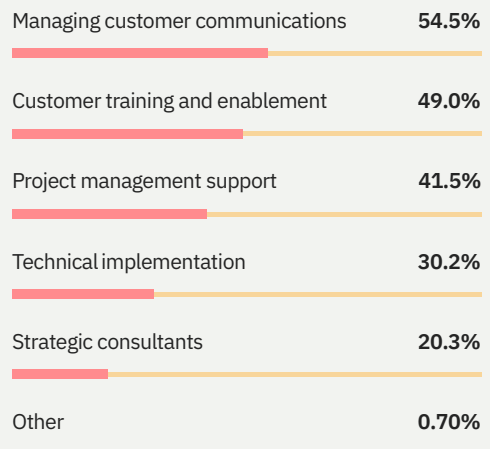
Key features of partner-led onboarding models include:

- **Extended capacity:** Partners enable businesses to manage onboarding surges without overloading internal teams.
- **Specialized expertise:** External partners often bring domain knowledge and technical skills that enhance the onboarding process.
- **Global reach:** For companies expanding internationally, partners with local market expertise ensure onboarding is culturally and regionally tailored.

To what extent are external partners involved in your onboarding process?



What roles do partners play in your onboardings or implementations?



Survey data highlights that **49.4% of organizations involve external partners in their onboarding processes** with sharing responsibility for milestones - particularly for high-touch or enterprise accounts. This model fosters scalability and ensures quality delivery, even for the most complex customer needs.

54.5% of these partners are also involved in customer training and managing communications.

Best practices for implementing self-serve and partner-led onboarding models

Identify customer segments - Use segmentation to determine which customers are best suited for self-serve versus partner-led onboarding. High-touch accounts may require partner involvement, while smaller or less complex implementations can benefit from self-service tools.

Build scalable resources - Invest in comprehensive knowledge bases, interactive content, and partner enablement programs to ensure consistent, high-quality delivery across models.

Set clear expectations - For partner-led onboarding, define roles, responsibilities, and KPIs to maintain accountability. For self-serve models, ensure resources are intuitive and easily accessible.

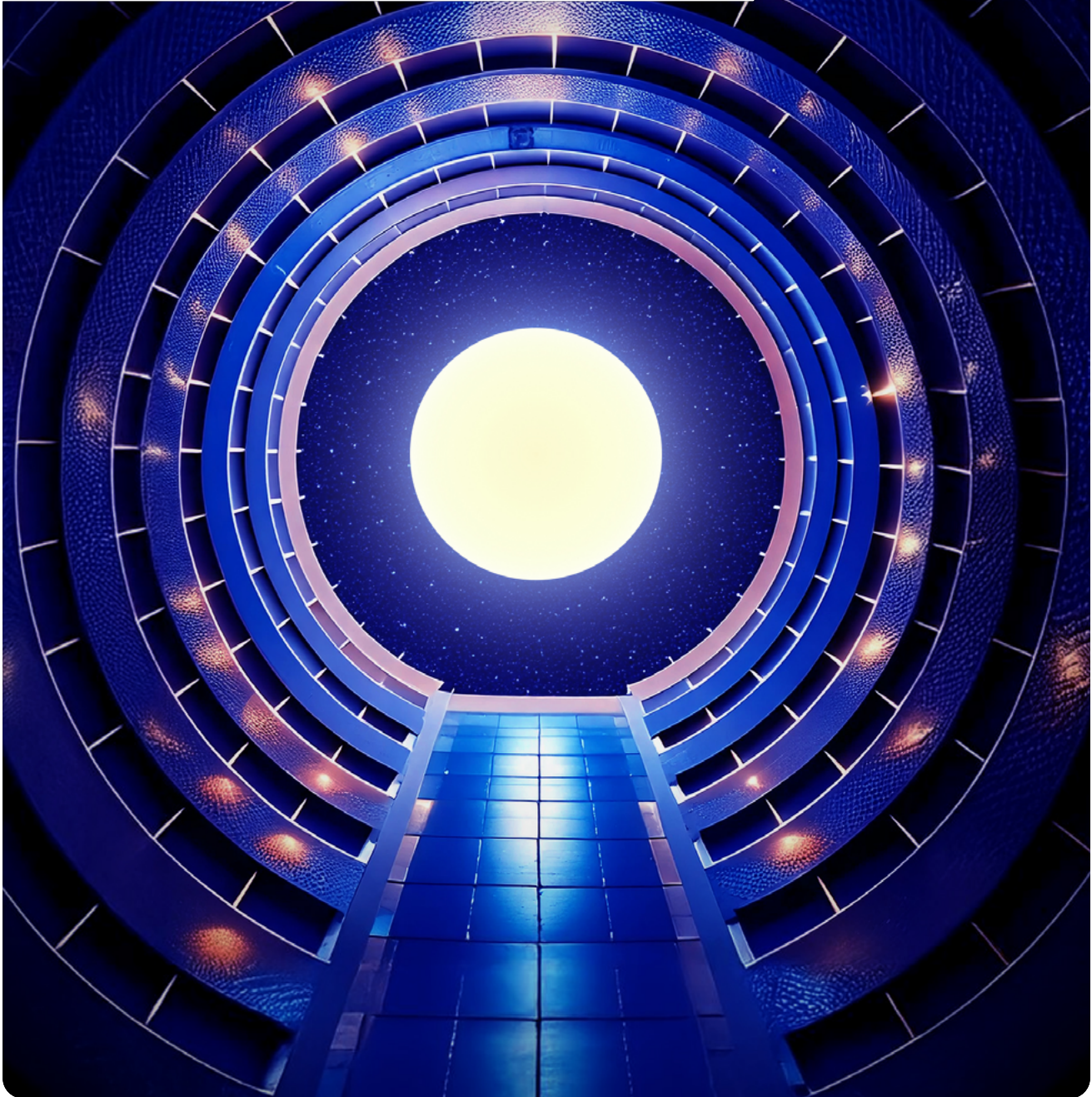
Gather continuous feedback - Regularly solicit feedback from both customers and partners to identify areas for improvement and refine processes.



For more information on how to set up a partner program at your organization, [head here.](#)

The role of AI and automation: Transforming onboarding workflows

CHAPTER
06



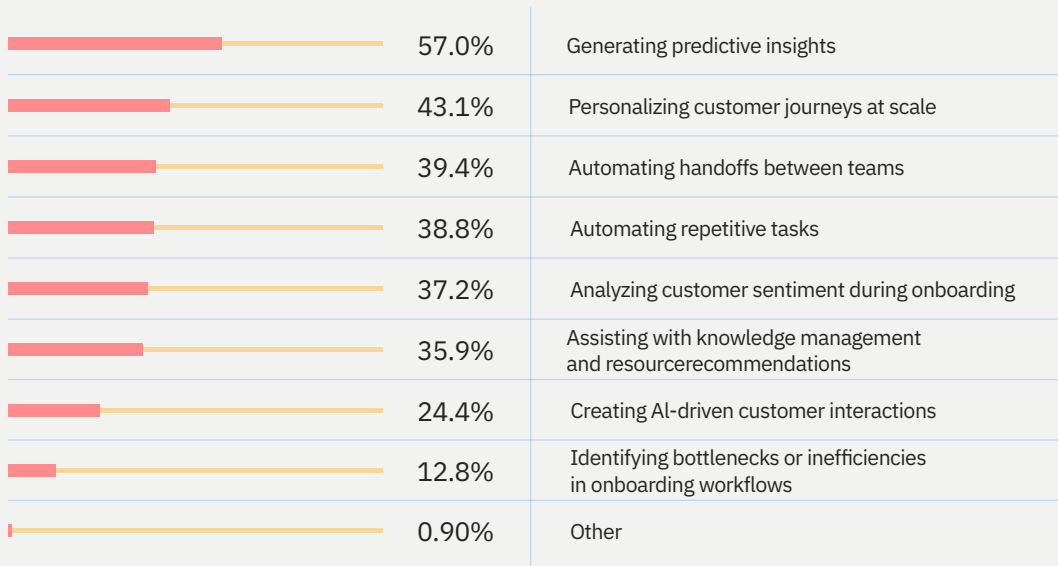
AI is no longer a futuristic concept; as with other areas of business, it’s a game-changing reality in customer onboarding.

The impact?

Survey insights reveal that **over 90% of companies are looking to leverage AI and automation tools** for their onboarding processes in 2025, for benefits in three key areas:

- **Automation of repetitive tasks** - Automating follow-ups, scheduling, and status updates saves time, allowing teams to focus on higher-value activities.
- **Predictive risk identification** - AI-driven tools proactively identify delays or risks in onboarding, enabling teams to intervene before issues escalate.
- **Crafting personalized journeys at scale** - AI helps segment customers and create tailored onboarding experiences that align with individual needs.

How do you plan to use AI in onboarding in 2025?



So what can onboarding teams do in 2025 to get the best out of the AI momentum?

Invest in AI-driven platforms - AI-powered platforms can revolutionize the onboarding experience by automating workflows, personalizing customer interactions, and predicting risks before they occur. For instance, platforms that automatically assign tasks and resources, send reminders, and track progress ensure nothing falls through the cracks. AI tools that schedule meetings, follow-up on action items, and generate project timelines can also ensure a seamless onboarding process. Additionally a sentiment analysis software can provide deeper insights into customer interactions, enabling teams to identify dissatisfaction or confusion early and take proactive measures. A predictive analytics tool, on the other hand, equips onboarding leaders with actionable forecasts, such as spotting potential delays or resource bottlenecks, allowing for timely intervention.

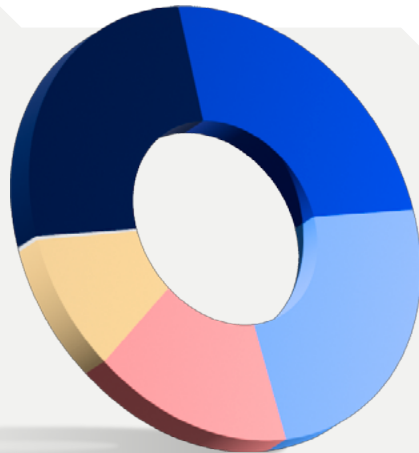
Or, you can alleviate all your stress and choose an [all-in-one onboarding platform](#) that helps you with all this and more.

Upskill their teams - Everyone knows that even the most advanced tools are only as effective as the teams behind them. Upskilling onboarding professionals is critical to ensure they understand and maximize AI capabilities optimally. Training programs can focus on helping teams interpret AI-driven insights, such as risk assessments or customer health scores, and make data-informed decisions. Businesses can foster a data-driven mindset so teams can move beyond intuition and leverage AI-generated insights to deliver more impactful results. Cross-functional collaboration is equally essential and onboarding teams must work closely with Customer Success and Product teams to create a unified approach to customer engagement and success.

Track metrics - To ensure these efforts deliver measurable outcomes, businesses should establish key performance indicators (KPIs) to track the impact of AI investments. Metrics such as time-to-value (TTV), customer satisfaction scores (CSAT/NPS), and onboarding efficiency can provide a clear picture of success. Regular reviews of AI performance ensure tools remain aligned with business goals, allowing teams to refine strategies and optimize workflows.

What are the primary outcomes your onboarding process is measured against?

55.9%	Customer satisfaction metrics (CSAT/NPS)
53.5%	Reduced churn within the onboarding phase
53.3%	Increased product adoption/usage rates
33.8%	Time-to-value (TTV)
21.1%	Revenue Impact
0.60%	Other



Customer advocacy: Turning customers into champions

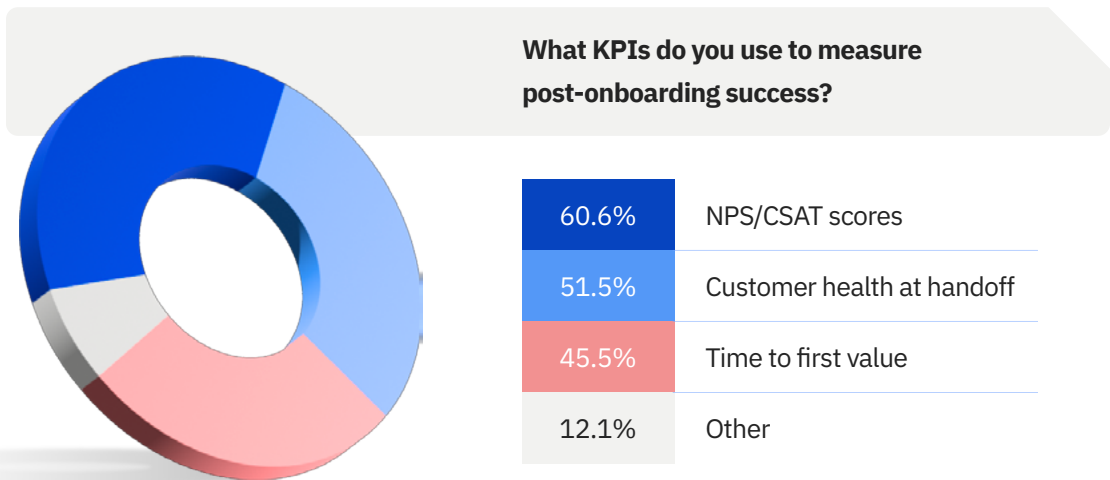
CHAPTER
07



In an increasingly competitive landscape, customer advocacy goes beyond customer satisfaction—it transforms satisfied customers into brand champions who actively promote your product, provide valuable feedback, and contribute to your growth. For onboarding teams, fostering advocacy begins during the onboarding process and continues as customers experience the value your product delivers.

At the heart of advocacy programs are robust feedback loops that allow organizations to gauge customer sentiment, identify areas for improvement, and refine their offerings. Feedback collected at key stages of onboarding helps businesses ensure their processes are aligned with customer expectations and evolving needs.

Survey insights reveal that 60.6% of respondents use NPS/CSAT scores and 51.5% use customer health-at-handoff scores to measure post-onboarding success. This underscores the critical importance of listening to customer feedback and taking action to achieve higher success rates post-onboarding.



Advocacy programs also pave the way for deeper engagement. Organizations build strong, mutually beneficial relationships by celebrating customer milestones, offering exclusive resources, and inviting customers to co-create success stories.

For instance, customers who achieve significant value from your product during onboarding are more likely to share their experiences, whether through testimonials, referrals, or participation in case studies.

Investing in advocacy not only strengthens customer loyalty but also creates a ripple effect of trust and credibility in the market. When your customers become vocal advocates, their stories resonate far more authentically than any marketing campaign. In turn, this amplifies your brand's reach and drives organic growth.

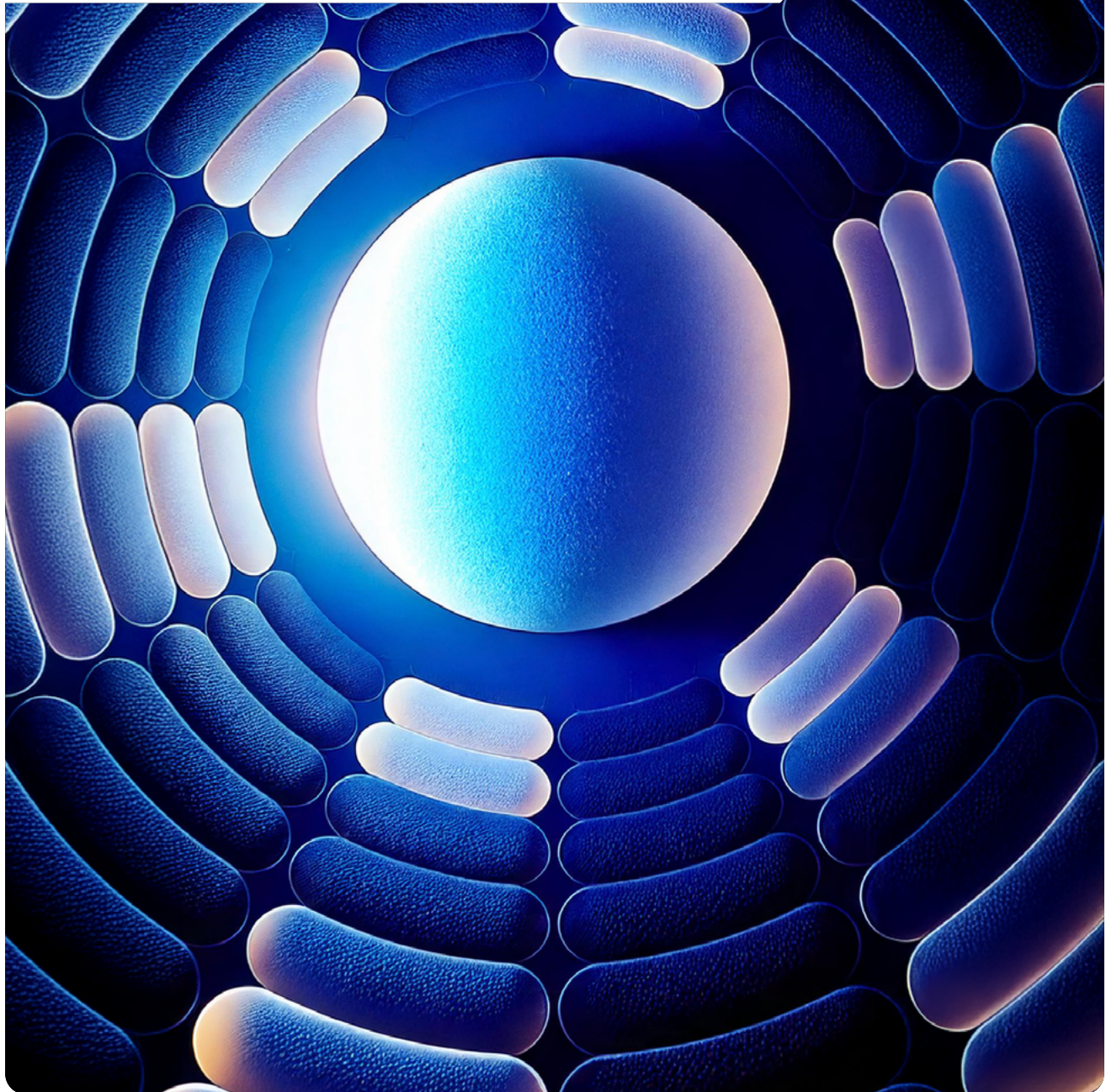
Ultimately, advocacy begins with great onboarding.

Delivering an exceptional onboarding experience that aligns with customer goals and ensures early success, can set the stage for businesses to foster a long-term partnership built on trust and value.

In 2025, customer advocacy is a strategic imperative for companies that want to turn their customers into their most powerful asset.

Re-onboarding:
The key to sustained
customer success

CHAPTER
08



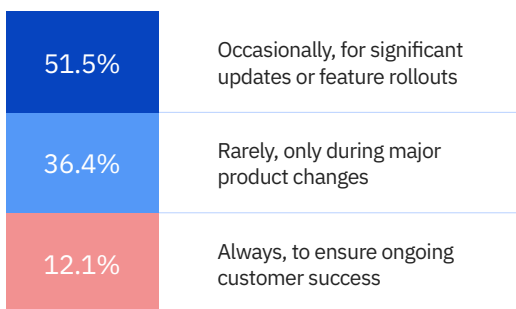
Re-onboarding involves re-engaging customers to ensure they fully leverage new product features, updates, or capabilities, addressing gaps that may arise over time and keeping them aligned with their goals. **63.6% of businesses acknowledge that they re-onboard customers from time-to-time**, either as part of a value realization strategy or when there're significant feature rollouts.

This wave of re-onboarding not only strengthens customer relationships but also creates opportunities to re-engage customers and drive additional revenue streams.

Why re-onboarding matters in 2025?

Customers often experience challenges when adapting to new functionalities or shifts in workflows introduced by software updates or otherwise. Without re-onboarding, these changes can lead to confusion, underutilization of features, and even dissatisfaction. Regular re-onboarding addresses these challenges by reaffirming the customer's understanding, showcasing new possibilities, and reinforcing their commitment to your product.

How frequently do you need to re-onboard or re-implement existing customers?



How can onboarding teams embrace re-onboarding?

A proactive and structured re-onboarding strategy follows:

Step 1: Recognize opportunities for re-onboarding

Re-onboarding is particularly valuable during major product updates, AI feature rollouts, or when introducing entirely new capabilities. Identifying moments of significant change allows teams to plan timely and impactful re-engagement campaigns for their customers. Also highlight to customers how these updates can enhance their work and directly contribute to their success. Educate them on new value propositions to help them understand why this is needed.

Step 2: Tailor re-onboarding to customer needs

Just as initial onboarding is personalized, re-onboarding should cater to each customer's unique use case and goals. Use segmentation to deliver tailored experiences that align with customer preferences, whether it's a high-touch walkthrough or self-service tutorials.

Step 3: Leverage technology for scalability

Automated workflows and AI-driven insights make re-onboarding scalable. Develop easy-to-access guides, video tutorials, and interactive tools that empower customers to self-serve during re-onboarding. For example, a quick product adoption and usage analysis can identify customers who might benefit most from additional guidance, while AI tools can suggest personalized learning paths or webinars. Develop easy-to-access guides, video tutorials, and interactive tools that empower customers to self-serve during re-onboarding.

Step 4: Incorporate feedback loops

Re-onboarding also presents an opportunity to gather insights directly from customers. Use this feedback to refine future onboarding and re-onboarding efforts, ensuring they remain relevant and impactful. Remember to plan regular check-ins and schedule periodic touchpoints to assess how customers are using the product and identify areas for re-onboarding. This can also act as a means to acknowledge customer achievements, reinforcing their investment in the product and deepening loyalty.

Looking ahead

Re-onboarding is not just a response to change; it is a proactive strategy for fostering long-term customer engagement and loyalty. This way, businesses can enhance customer satisfaction, reduce churn, and unlock new opportunities for expansion in 2025 and beyond.

The road ahead: Trends shaping 2025 and beyond

CHAPTER
09



2025 marks a turning point for the evolution of customer onboarding, where economic conditions, technological advancements, and shifting customer expectations are converging to redefine onboarding practices. Insights from our survey reveal key trends that will shape the future, offering a glimpse into what lies ahead for onboarding teams.

Economic pressures are driving efficiency -

In a time of economic uncertainty, companies are prioritizing cost-efficiency and resource optimization. Survey responses indicate that **≈ 90% of organizations are actively investing in automation and AI to streamline onboarding processes, reduce manual workload, and achieve faster time-to-value**. Additionally, 47% of respondents cited efficiency improvements as their top onboarding goal for 2025, reflecting a heightened focus on doing more with less.

AI and predictive insights revolutionizing onboarding -

AI continues to emerge as a game-changer, not only automating workflows but also providing predictive insights that transform how businesses engage with customers. For instance, **54.5% companies feel advanced onboarding tools with automation capabilities can help their team achieve onboarding excellence in 2025**. From real-time sentiment analysis to forecasting project delays, AI enables onboarding teams to proactively address challenges, ensuring smoother customer journeys.

Personalization at scale -

Personalization will remain a critical focus as customers demand tailored experiences. However, achieving personalization at scale requires innovative solutions. Survey findings show that 42.4% of businesses are partially personalizing their processes to deliver more relevant and impactful onboarding journeys. Additionally, intuitive UX design is playing an increasingly pivotal role in ensuring customers feel supported and empowered from day one.

The rise of self-serve and partner-led models -

Self-serve and partner-led onboarding models are gaining momentum. Survey data reveals that 49.4% of organizations involve external partners in their onboarding processes, driven by the need for scalable, customer-friendly solutions. These models not only reduce operational strain but also align with modern customer preferences for autonomy and flexibility.

Continuous customer engagement through re-onboarding and advocacy programs -

With dynamic product updates and increasingly complex solutions, re-onboarding has become a cornerstone of customer success strategies. According to our survey, 57.6% of respondents identified re-onboarding as critical to maintaining customer satisfaction. Paired with advocacy programs, this ensures customers remain engaged and aligned with the value your product delivers over time.

What this means for 2025 and beyond

The future of onboarding is both challenging and full of opportunity. Businesses must strike a balance between efficiency and personalization, leveraging technology to scale their efforts without losing the human touch.

As we look to 2025 and beyond, the message is clear: **onboarding is no longer just the start of the customer journey—it's the foundation for sustainable success.**

Rocketlane and its uses: A sneak peak

CHAPTER
10



At Rocketlane, we believe in practicing what we preach. Instead of telling you how our product looks or functions, this time, we're showing you a sneak peek of all that it offers and how our customers are using it.

Our onboarding process is powered by our very own platform, demonstrating how we help our customers achieve faster time-to-value, create delightful onboarding experiences, and drive efficiency at scale. By using Rocketlane to onboard our customers, we showcase the full potential of our solution to our customers upfront, blending streamlined processes with a personal touch.

In this ebook, we have seen the trends for the coming year. Here is how Rocketlane is already ahead of it and innovating further to keep the edge.

Six major ways we are doing it include:

Centralized collaboration and transparency through our Customer Portal

[Rocketlane's Customer Portal](#) transforms onboarding into a seamless, website-like experience that's easy to navigate, empowering customers with everything they need in one place. Designed as a one-stop shop for tracking milestones, assigning tasks, and staying informed about project progress in real-time, the portal creates clarity and alignment at every step.

Embeddable directly within your product and built with the simplicity of LEGO blocks, Rocketlane's customer portal isn't just a tool—it's the user experience (UX) of customer experience. It's a platform where customers feel engaged, informed, and truly valued throughout their journey.

“Our executive leadership team really enjoys the interface and the ability to jump in and see very quickly at a glance how projects are going.”

Elizabeth Kuehl

Senior Manager of the Customer Onboarding Team at Fluxx

Templated project plans tailored to every customer

At Rocketlane, customers use our [template-driven project](#) plans to streamline onboarding. Whether onboarding a small team or a large enterprise, these templates ensure consistency while allowing for customization to fit specific needs. With conditional logic and AI-powered suggestions, our templates adapt dynamically to the unique requirements of each customer.

We have templates set up for handoffs too so tasks, timelines, and roles are pre-configured so teams can hit the ground running while providing customers with a seamless, professional experience.

Automation that frees up time for high-value work

Automation is at the heart of how customers scale their onboarding efforts. Rocketlane automates reminders, follow-ups, and status updates across projects, saving time for both internal teams and their customers. This enables teams to [focus on what matters most](#)—delivering value and building meaningful relationships. A lot of our customers have highlighted automation as a true game-changer in their onboarding journeys, significantly reducing manual effort.

Real-time business insights and reporting

Customers utilize Rocketlane's [real-time dashboards and reporting](#) to monitor project health, track progress, and identify bottlenecks. These insights allow them to proactively address issues before they impact the customer experience, ensuring every onboarding stays on track.

With just a few clicks, Rocketlane can generate detailed reports that highlight project trends, completion rates, and customer engagement levels—empowering teams to take data-driven actions.

“Dashboards are the key reporting item that we use. We’ve built custom dashboards in Rocketlane and we look at it actually every single day.”

MaintainX

AI-driven efficiency for intelligent workflows

Rocketlane's AI capabilities transform how onboarding teams work, enabling smarter decisions and faster execution. With AI-powered features like [Rocketlane's AI Fills](#), businesses can automate post-meeting deliverables, follow-ups, and project updates—streamlining the process and ensuring teams stay focused on strategic tasks. Customers also benefit from AI-driven insights that help assemble the perfect project team and optimize workflows, all while aligning with business objectives.

Rocketlane leverages AI so onboarding teams can scale more effectively, maintain efficiency, and consistently deliver exceptional customer experiences.

Delightful customer experiences, every time

Rocketlane's [resource management capabilities](#) ensure that we allocate the right people to the right projects at the right time. With Resource AI and in-built time tracking modules, customers gain visibility into team availability and capacity, enabling them to assemble the perfect project team, while keeping business goals in sight!

This ensures onboarding teams can scale seamlessly while balancing workloads efficiently.

“We implemented a smaller \$30,000 customer in just six meetings and 26 hours compared to the 300 hours it used to take.”

Kasey Smith

Director of Operations
and CX at Graphite

Why Rocketlane?

Rocketlane is the next-generation onboarding and implementation platform, purpose-built to transform how internal teams, customers, and partners collaborate.

Constantly redefining onboarding at its core, Rocketlane helps organizations accelerate time-to-value (TTV), deliver seamless client experiences, and achieve new levels of efficiency and productivity.

From streamlined communication and project management to advanced AI-driven insights, time tracking, and resource management, Rocketlane has it all. It is the only solution designed to support every stakeholder, making onboarding faster, more effective, and more delightful than ever before.

See how Rocketlane can elevate your project delivery!

Want to know more?

Schedule a 30-min discovery call with our team and learn how Rocketlane can help you enhance your customer journey.

[Schedule now](#)

Try for free

Prefer DIY?

Check out the Rocketlane Experience for free.
Sign up for a 14-day trial today!

[Try now](#)

We're thrilled to share that Rocketlane has once again emerged as a Momentum Leader in the Client Onboarding category on G2!

