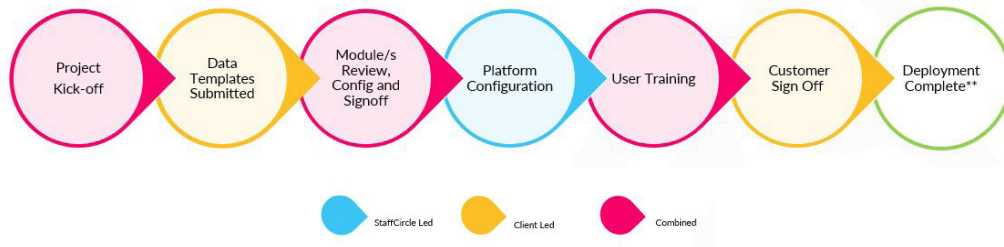


CUSTOMER IMPLEMENTATION OVERVIEW

Comms-Culture-Performance



PROJECT KICK OFF

Week 1

Project Kick Off Call (1 hour)

Data Gathering

During this call we will check to see if you are comfortable with gathering the required data which is outlined in the data templates (sent on contract signature). We can answer any questions you have and then we will settle on a due date for this information to be sent to your Implementations Engineer.

Time Line

We will then look at scheduling the deployment within the provided window. After this we can discuss what will be covered in our next call.

Key Elements for Deployment

This is a project summary; we will establish which modules you intend to deploy first and ask about any longer-term plans. You can provide any information which you think may help the implementation go smoother such as any plans for other internal projects (example: Salesforce deployment planned in a few weeks). This is so we can plan around your availability and any other projects you may have lined up.

Integrations

It is important for us to be aware of any integration requirements you may have. Currently, StaffCircle integrate with Microsoft Single Sign-On, Microsoft Teams, ADP (American Marketplace), Microsoft Power Automate

Information Required

- An approximate date deployment window
- An idea of which integrations you need
- An idea of the order in which you want to roll out the StaffCircle modules
- A list of key stakeholders who need to be kept up to date with the project
- An idea of any potential growth plans which may affect your user count
- A list of "Champions" who have been chosen to receive training

DATA TEMPLATES SUBMITTED

DATA COLLECTION



Weeks
2&3

Project Check In (Email)

This email will confirm that the data upload has been completed and that we are now ready to book in your module overview sessions.

The email will include links to your implementation engineer's diary so you can book a time and slot which works for you and the chosen "Champions".

OVERVIEW SESSIONS

These sessions are for Superusers and Admins. **These calls are recorded** and you will be provided with a copy upon completion.

By the end of these sessions, you will have a better understanding of the ways that you can use the StaffCircle platform. Take some time to discuss internally, review what you have seen and let us know when you're happy to proceed to the next step. Once you have let us know you're happy to proceed we'll organise a call to review any ideas you may have or any questions which have come from your internal discussions.

We will also need to know what groups of users will need access to which elements of the platform. This will be configured prior to any user training and you will be provided with a template to complete this.

Weeks
2&3

Performance Management Overview (1 hour)

- ☐ Competencies
- ☐ Awards & Feedback
- ☐ Objectives & Reporting
- ☐ Objective Types
- ☐ Personal, Departmental & Company Objectives
- ☐ Sharing Objectives
- ☐ Reviews & Reporting
- ☐ Success Circles & Scoring
- ☐ Feedback Questions
- ☐ Review Types

CUSTOMER REVIEW & PLANNING

- ☐ Competencies List
- ☐ Review Types & Feedback Questions
- ☐ Award Types

DOCUMENTS SENT TO ENGINEER

TRAINING SESSION



DATA COLLECTION



Weeks
2&3

Comms & Culture Overview (1 hour)

- ☐ Feeds
- ☐ Custom Feeds
- ☐ Custom Channels
- ☐ Posting Articles
- ☐ Social Sharing
- ☐ Polls
- ☐ Tasks
- ☐ Notifications & Alerts

CUSTOMER REVIEW & PLANNING

- ☐ Custom Channels & Feeds list

DOCUMENTS SENT TO ENGINEER

TRAINING SESSION



DATA COLLECTION



CONFIGURATION

Week 4

Platform Configuration Review (45 minutes)

We will have configured the appropriate security groups, ensuring that your users will only see the functionality that you have specified.

This call will be to establish (if any) which changes need to be made to your StaffCircle platform before we begin to train your users.

After this call, we are now ready to train your users on the platform! We will schedule the 2 sessions during the Platform Config call, one for your management team and one for the general users.

CONFIGURATION



USER TRAINING

Week 5

Manager Training Session (1 hour)

This training session will be open to all users listed against the manager security group in the Security Profile Template.

This session will show your managers how to navigate the platform. These sessions are recorded, and you will receive a copy upon their completion. Once both the manager and general user sessions are complete, we will have a short call to sign off the project as the next stage will be Go-Live!

TRAINING SESSION



Week 6

General User Training Session (1 hour)

This training session will be open to all users listed against the general user security group in the Security Profile Template.

This session will show your general users how to navigate the platform. These sessions are recorded, and you will receive a copy upon their completion. Once both the manager and general user sessions are complete, we will have a short call to sign off the project as the next stage will be Go-Live!

TRAINING SESSION



CUSTOMER SIGN OFF

Week 7

Sign Off Call (30 minutes)

This is your final call before locking in a Go-Live date, we have collected your data, uploaded it to the platform, tweaked it after the module overviews and trained your users. We just want to check that you're happy with everything so far and get confirmation that you wish to proceed with your Go-Live. Your Implementations Engineer will be booked for the entirety of your Go-Live date to be on hand should you need anything.

PLATFORM GO-LIVE