TalentClick

TalentClick's New-Customer Implementation Plan

PRE-PLANNING

TO GET STARTED:

1. Select a key stakeholder in your org who will be TalentClick's primary contact.

2. Decide which employees you want to participate in the product knowledge training (ie. how to use and interpret report results for screening and selection).

3. Decide initial list of job types. (This will lead to further discussion around group codes and usage reporting around each job type (#4 below).

DURING THE IMPLEMENTATION:

1. Decide which team members should be able to access your online account and, consequently, which employees you want to participate in the user training for the cloud-based portal. (These may be the same people as in (2) above).

2. Decide on training dates and times. (It's probably easiest if our team goes to your office for training).

3. Select the roles on which you would like to have a job analysis and benchmarking completed.

   ** Please prioritize. As part of each job analysis, you will have to choose 3-5 "job experts" who know the role well and know what is required (knowledge, skills, attitude, work style, personality traits) for success, so that the survey can be sent to those 3-5 people.*

4. Decide which reports should be generated for which roles (We can advise on this) and to whom the reports should be sent. Different links will be created for each, but we'll need the names and email addresses of all recipients.

5. Send us a high rez version of your logo in a .jpeg or .png format.

Setup & Implementation Checklist

(FOR USE BY EACH PARTY'S PROJECT MANAGER)

STEP #	TASK	DETAILS	WHO	TARGET DATE	COMPLETION DATE
1	Sign & send agreement		Client		
2	Internal setup - TC sales team	Save signed agreement in SF and /sales/partner folder	Admin		
3		CRM - update opportunity	Admin		
4		Countersign agreement, then forward to customer/partner	Admin		
5	Send email #1 (implementation email)	Include implementation setup link, introduce TC team (CC sales)	Sales		
6	Internal setup - TC Operations	Accounting System - set up as new customer	Admin		
7		CRM: update customer record	Admin		
8		Update file system to ensure all files are saved under /sales/partner folder	Admin		
9	Internal setup - TC Implementation Team	Groupcode - save in master groupcode sheet	Project Manager		
10		Surveys - add paid groupcode, remove trial group-code, create new link, add logo			
11		CRM add groupcode to account			
12		Send logos to create co-branded materials (if applicable)	Client		
13		Add logo, create sample reports	Project Manager		
14		Processor - add new templates, add workflow lines, test internal email recipient			
15		Client email - set up with links & sample, test client email recipient, cc. SF & Sales			
16		Contact Client IT to whitelist assessments@talentclick.com			
17		Determine success criteria for follow up			

STEP #	TASK	DETAILS	WHO	TARGET DATE	COMPLETION DATE
18	Complete & submit implementation setup checklist		Client		
19	Send Invoice	Accounting	Business Manager		
20	TC Internal setup	Save implementation link details to /customers	Project Manager		
21	TC Portal Set up	Name groupcode, create sub account, create users/passwords (attached to appropriate groupcodes). Test each user.	Project Manager		
22	Send email #2 (Resources & setup)	Assessment link, email template, sample reports, test assessment email, portal login	Project Manager		
23	Send email #3 (Kickoff meeting outline)	Kickoff meeting agenda	Sales		
24	Kickoff call (phone)	Use /sales/doc templates/kickoff call outline document Use /sales/sales training/client success info document	Project Manager, Client Admin		
25	Training call (phone)	Next steps Confirm client has links Confirm client understands process for completing Resend portal login and resources Training on portal use - Team Analytics, Benchmarking, Report Interpretation Our next follow up date will be <...>>	Project Manager, Client Admin		
26	Add to customer success sheet	/customer success tracking. Complete dates for follow up.	Admin		