Guide to Client Success

You've made the first step in enhancing your culture through engaging and aligning your employees with Novareté – great job! We are excited to work with you every step of the way to ensure maximum success. Part of the onboarding process will include a series of meetings to make sure you feel comfortable with using Novareté. Each of the below meetings are created as a way to check in and talk through different goals, features, and questions you have. While this document is a great outline for each discussion, it isn't inclusive. Each of our clients is unique and we will be tailoring each step along the way to best fit your needs.

Get Ready…

Meeting 1: One-hour Implementation Plan Discussion

Objective: Gather the Implementation Team to share why Novareté was purchased, the current challenges faced by the company, efforts towards solutions, goals, and explore ways Novareté can enhance those efforts.

Required Attendees: The full Implementation Team, which includes at a minimum: The Executive Champion, Project Manager, Site Administrator(s), Dilemma Scheduler(s), Moderator(s), IT Lead, and the Change Agent

A few examples of goals we've seen in the past:

a. Help employees learn and remember the company values
b. Increase community by having a site for sharing ideas, questions, experiences, information, etc.
c. Help leadership to scale tone at the top
d. Enhance a positive culture through recognition program

Get Trained…

IMPLEMENTATION TEAM TRAINING

Meeting 2: Two-hour Training

Objective: Give a tutorial to the Project Manager and at least two Site Administrators (at a minimum). We believe in the "train the trainer" philosophy. During this time, we want to make sure this group feels comfortable with Novareté as they will be teaching the rest of the employees how to use it.

Required Attendees: The Project Manager, at least one Site Administrator, the Dilemma Scheduler, and the Change Agent

A few items we'll review during the training:

a. How to register and approve new users
b. Scheduling a dilemma
c. Contributing posts
d. Individual and group profile fields
e. Using the Leaderboard and the Analytics dashboard

Complete the *Scheduling Your Dilemmas* worksheet

Objective: Identify the process by which your organization will schedule your weekly Dilemma's and choose the gold star answer. The project manager is responsible for ensuring this worksheet is completed and weekly dilemmas scheduled.

Complete your *Checklist for Success* - Site Administrators

Objective: This is a guide to help you try different features of the site and become comfortable with Novareté. This exercise will also populate the Novareté site before employees join in. The project manager is responsible for ensuring these checklists are completed.

Complete your *Regular Contributions* worksheet

Objective: This is a guide to help you try different features of the site and become comfortable with Novareté. This exercise will also populate the Novareté site before employees join in. Use the *Novareté Jump Start* guide to prompt ideas. The Change Agent is responsible for ensuring this worksheet is completed and carried out.

EMPLOYEE TRAINING

Meeting 3: Employee Training Preparation and Review

Objective: Develop the training schedule for your employees, identify the trainers, and the process by which you will train them. During this training it is important that every user is registered, downloads the mobile app, and receives their *Checklist for Success*.

Required Attendees: Anyone involved in planning/running the training, including the Project Manager, at least one Site Administrator, and the Change Agent

A few ways we've seen clients train their employees:

a. Train the Implementation Team first
b. Train by departments
c. Train a group of department heads, and then each department head trains their respective employees
d. Train a group of managers, and then each manager trains their respective reports
e. Provide a few "all employee" trainings and make sure each employee attends one

Make A Difference!

Pulse Check and Employee Satisfaction Survey

Objective: During this time, we will review how to create a Pulse Check survey and brainstorm ideas around different ways you can use the feature. Come with your employee satisfaction questions to establish an employee satisfaction baseline.

Required Attendees: Project Manager, the Change Agent, and leadership from your Human Resources department

Some example surveys include:

a. Employee satisfaction
b. Event feedback (e.g. golf outing, conferences)
c. RSVP’s for events (e.g. team building, conferences)
d. Get to know your team
e. Scenario-based testing and training
f. Interest polls (e.g. who wants to be on a committee, what should we do for our team building event)

New Hire Assimilation

Objective: Novareté is a wonderful tool for helping new hires quickly acclimate to your company culture.

Required Attendees: Project Manager, the Change Agent, and leadership from your Human Resources department.

A few examples of tasks to add to the new hire process:

a. Novareté registration
b. Complete the appropriate *Checklist for Success* (basic user or site administrator)
c. Send out a broadcast introducing themselves to the entire team with a link to their profile card.
d. A Site Administrator adds them to appropriate groups

Create Groups and Enroll Members

Objective: During this meeting we will review your company’s groups, walk through creating a few of them, and enrolling members in them. Before this meeting, please ensure you’ve completed the *Creating Your Groups* worksheet.

Required Attendees: Project Manager, at least one Site Administrator, and the Change Agent

Leaderboard and Analytics Dashboard

Objective: The Leaderboard and Analytics Dashboard are powerful tools to keep a pulse on your company’s engagement and alignment. We will review your Leaderboard and Analytics Dashboard to see where you are doing well and what needs some improvement. We will also explore ways you can use the Leaderboard and Analytics Dashboard to shape meeting discussions, create follow-up surveys, and develop reports for leadership.

Required Attendees: Project Manager, Site Administrator(s), Executive Champion, the Change Agent, and your Leadership Team

Before this meeting, please ensure you’ve completed the *Learning to Read your EKG* worksheet.

Question’s to consider when looking at the high and low users on the Leaderboard

a. Are they from the same department?
b. Could you empower them by adding them to a leadership team?
c. Are these people involved in committees and groups?
d. Ask them why they are engaged to see how to empower other employees.
e. Ask them to lead trainings, seminars, etc.