

SnapEval Onboarding Checklist

We've developed this eight-step checklist based on many successful SnapEval deployments. The steps are detailed for mid-sized organizations with hundreds of employees (or more). For smaller organizations, we can compress or eliminate many of these steps including a formal pilot and incremental rollout across the organization.

***Note:** This asterisk indicates steps where SnapEval can help. This assistance is free and there's no obligation. We want to help assure the success of your Continuous Performance Management implementation with SnapEval!

1. Create a SnapEval account for your organization

- Create a SnapEval account at <https://www.snapeval.com/> or in the ADP Marketplace at <https://apps.adp.com/apps/77211>
 - This can be a free 10-user account to get started
 - We'll need to upgrade to a paid subscription account when we're ready to enroll more than 10 users

2. Plan and execute a pilot deployment for evaluation and configuration of your account

- Identify and assemble a pilot team
 - This should be a small group of individuals who are open to working with SnapEval as administrators, managers and employees.
 - The purpose is to exercise SnapEval as you would expect to use it in your organization
 - It is ideal to have representatives from different departments, roles, etc.
- Schedule a 'kick-off' web meeting with the pilot team and SnapEval*
 - We will introduce the pilot team members to SnapEval and how to use it
 - We can discuss how the account will be configured to make it most effective for the organization
- Configure your SnapEval account with the pilot team and data*
 - Define goal areas
 - Organization-wide goals & values (required)
 - Department goals (optional)
 - Job function goals (optional)
 - Team goals (optional)
 - Individual goals (optional)
 - Select achievement levels (you can use the default ones or we can configure them)
 - Any additional configuration such as 360 degree feedback, team feedback, etc.?
 - Enroll the pilot users in SnapEval
 - To ensure that everything is configured correctly, for each user we will need

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- First Name
 - Last Name
 - Job Title
 - Email? (Y/N). If 'yes,' email address
 - Is this individual a SnapEval Enterprise Administrator? (Y/N)
 - Reporting Relationships (Who the user can provide feedback to)
 - Each user will automatically receive a SnapEval welcome email as they are enrolled
 - After enrolling the users, we will configure*
 - Reporting relationships (who reports to whom)
 - Group membership (e.g. members of a department)
 - Group administrators (e.g. department heads, team leaders, etc.)
 - Encourage pilot team members to download and install the SnapEval mobile app for their smartphones
 - Run the SnapEval pilot for a few weeks
 - Encourage the pilot team members to capture 'Evals' of all kinds for each other
 - Capture 'thank-yous' and acknowledgements
 - These can be silly, just to exercise SnapEval, such as "Thank you for bringing in doughnuts this morning."
 - Use the SnapEval mobile app (and voice-to-text dictation) as well as the mobile app
 - Capture developmental feedback. Again, these can be silly. The purpose is just to become familiar with the mechanics of using SnapEval.
 - Configure SnapEval's queuing features to automatically queue potentially problematic feedback for review by administrators*
 - Inappropriate language (remember to configure the custom dictionary if desired)
 - Low achievement level feedback
 - Feedback with a negative sentiment (e.g. "You are a bad employee.")
 - Have managers create performance summaries for their assigned employees
 - Use SnapEval's push notification feature to send customized push notifications to pilot team members
- 3. Make configuration adjustments based on pilot feedback**
- Based on pilot feedback, make adjustments to the SnapEval configuration (e.g. corporate-wide goals, achievement levels, etc.)*
- 4. Plan an organization-wide deployment**
- Plan a strategy for organization-wide deployment
 - Identify logical ways to introduce SnapEval incrementally across the organization (e.g. by department, location, shift, etc.)
 - Identify leaders in each area that can be "SnapEval Experts" from the perspective of using SnapEval.

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- These are often department heads, team leaders, or others who will likely also be Group Administrators in your SnapEval account.
 - We will train these individuals before deploying SnapEval
 - If not completed in the pilot, identify groups and group-level goals that are applicable for each area
 - Departments and department-specific goals
 - Job functions and job function-specific goals
- Configure the SnapEval account with groups, group-level goals, etc. in preparation for organization-wide deployment*

5. Schedule training for the organization-wide deployment

- Schedule a “train the trainer” web meeting with SnapEval for the “SnapEval Experts”*
 - We will introduce SnapEval and help them to learn what they need to know to use SnapEval as managers, employees, and Group Administrators
 - These SnapEval Experts will help to train their own areas using SnapEval videos and other resources

6. Introduce and deploy SnapEval to a single area within the organization

- Select a specific area (department, location, shift, etc.) to introduce SnapEval
 - Let the managers and employees know that they’ll be receiving a ‘Welcome Email’ from the SnapEval system when they are enrolled
 - Schedule brief training sessions. These are led by the SnapEval Expert(s) for their area. They will have SnapEval videos and other resources to help with the training.
 - Ensure managers know how to
 - Capture and share feedback
 - View feedback that they’ve given
 - Create performance summaries
 - Ensure that employees know how to
 - View feedback that they’ve received
 - Create Self-Evals
 - Request feedback
 - Create and share feedback with others if 360 degree feedback is enabled
 - Define a period of time (typically a week) where managers and employees can become familiar with the SnapEval web portal and mobile app. They should capture and share practice feedback that isn’t real. This practice feedback will all be archived when the practice period is over, so encourage them to capture feedback liberally!
 - Enroll the managers and employees in this area into SnapEval*
 - For each manager and employee we will need:
 - First Name
 - Last Name
 - Job Title

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- Email? (Y/N). If 'yes,' email address
- Is this individual a SnapEval Enterprise Administrator? (Y/N)
- Reporting Relationships
 - Who the user can provide feedback to (acting as a manager)
- Group Membership (all of the groups that the user is a member of, if any)
- Group Administrator Assignments (all of the groups that the user is an administrator for, if any)
- We will then:
 - Setup the reporting relationships (who reports to whom). An organization chart can be very helpful!
 - Configure group memberships (e.g. who is a member of a department)
 - Configure Group Administrators and Organization Administrators (if any)
- During the 'practice' period, monitor the managers and employees to make sure that everyone activates their own SnapEval account, installs the SnapEval mobile app, and captures and shares practice feedback.
- Use any feedback from the managers and employees to make additional configuration adjustments.*

7. Introduce and deploy SnapEval incrementally across the rest of the organization

- After the practice period is complete for this area, introduce SnapEval to the next area using the same steps outlined above. Make sure that the managers and employees in this area have an opportunity to practice with SnapEval. Introduce SnapEval to successive areas until everyone in the company has been enrolled and has had an opportunity to practice with SnapEval.

8. Go live!

- When SnapEval has been introduced to all areas, and everyone has had an opportunity to practice using it for at least a week, announce that SnapEval will 'go live' for the entire organization on a specific day and time. At or after this date, archive all practice data* and 'go live'!

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