eMinder checklist

1. Get Import File completed by client and get to Catherine.
    - User types:
        i. "Admin" = can run reports and can add/delete
        ii. "Manager" = can run reports
        iii. "Employee" = everyone else
    - Locations and departments – consider how granular the client wants to see data and let this guide how far you break down the locations and departments.
2. Get Way card to Catherine.
3. Get client logo to Catherine.
4. Find out who at the client should get the Sunday weekly summary.
5. Find out whose address should be listed as the "reply to" address.
6. Find out whether or not they want the Monday email to go out.
7. Get the credit card authorization form completed and returned to us.
8. Confirm what date they want eMinder to start.
9. Suggest that they make sure their IT department "whitelists" the address: eMinder@highperformingculture.com so that the emails don't get stuck in spam folders.
10. Remind the client to incorporate eMinder into their standard new hire/termination checklists.
11. After the client is active, check in with admin person to be sure they're comfortable with how to log in/add or delete people/run reports.
12. Check the weekly results for the first few weeks and touch base with the client to discuss. Continue to do this periodically thereafter.

Additional notes:

- Once eMinder is "activated" (usually the Sunday before they start), all managers and admin people will automatically be sent an email from the system welcoming them and providing log-in instructions. If people don't get it, lose it, or can't remember, they can always reset it themselves. Their user name is always their email address, and then they can hit "forgot password." The system will then send them an email with further instructions for setting up a password.
- Remember to point people to the tutorials that are on the website (in the For Clients tab). There are tutorials for logging in, adding/deleting people, running reports, and editing lessons.
- Only those you've designated can edit lessons. This is done via a checkbox in the employee screen for that person.