

Bonusly Launch Overview

Learning Resources

Ready to learn about all things Bonusly? Your Implementation Specialist will get you and any members of your team that need it access to Learn.Bonus.ly to get started setting up your account and ready to launch!

Courses Offered:

- ☐ Account Configuration
- ☐ Admin Training
- ☐ Communicating your Rollout Internally

Configuring Bonusly for your Business

Settings

Review and approve account configuration:

- ☐ [Allowance and Currency](#)
- ☐ [Logo/Colors](#)
- ☐ [Hashtags](#)

Integrations

Integrations

**Integrations require that you are an admin both in Bonusly and the tool you are integrating with. This may mean that you need to loop in the person who manages these tools at your company. If this is the case, please [invite them to Bonusly](#) and [grant them admin access](#) so that they can configure your integrations.*

Integrations cont.

Social Integrations

Configure and test [your social integrations](#).

	<ul style="list-style-type: none"> • Using Slack? Click here to get set up. Here is an article to help you set up Slack. • Using MS Teams? Click here to get set up. Here is an article to help you set up MS Teams. • Using Google Hangouts Chat? Click here to get set up. Here is an article to help you set up Google Hangouts Chat. • Using Office 365? Click here to get set up. Here is an article to help you set up Office 365. <p>Digital Signage</p> <p>With Bonusly Digital Signage, you can display recent bonuses on any screen in your office. It's a fun way to increase the visibility of recognition and keep it top of mind for your team. Interested in getting this setup in your office? Here is an article to help you set up your Bonusly Dashboard.</p> <p>Single Sign On (SSO)</p> <p>Configure and test your SSO integration.</p> <ul style="list-style-type: none"> • Using Okta? Click here to get set up. Here is an article to help you set up Okta. • Bonusly also allows you to utilize other SSO options like OneLogin, Microsoft, Bitium, Ping Identity, and more through our SAML integration here. Here is an article to help you set up SAML. <p>HRIS/HRMS Integrations</p> <p>Configure and test your HR System integration.</p> <ul style="list-style-type: none"> • Using BambooHR? Click here to get set up. Here is an article to help you set BambooHR. • Using Zenefits? Click here to get set up. Here is an article to help you set up Zenefits. • Using Namely? Click here to get set up. Here is an article to help you set up Namely. <p>IMPORTANT NOTE: Do <i>not</i> select the "Automatically activate?" option when configuring your integration, otherwise your team will immediately receive their invitation to join Bonusly. Instead, you will activate their account manually on launch day. After you have launched, you'll adjust the setting so that accounts will be automatically updated moving forward.</p>
User Management	
<p>Nightly Customer Flat File Transfer</p>	<p>If your HR System isn't listed in Bonusly that's no problem! You still have two other options for bulk managing your users; Nightly Customer Flat File Transfers or Bulk Uploads</p> <p>Build your user list. You can begin setting up the automatic nightly flat file transfer to our SFTP server by using this template. If there are additional columns that you need, let Bonusly know and we can add them.</p> <p>The file should only include non-termed employees so that if/when an employee is termed, they</p>



<p>Bulk Uploads</p>	<p>disappear from the report. We'll then automatically deactivate that employee's account on the Bonusly side. Any new employees added to the report will automatically be invited to Bonusly.</p> <p>Once the report is created, we'll provide you with the credentials to the SFTP server and take care of the rest. For us to set up on our side, we'll need about 1 week.</p> <p>Check out this article for more detailed instructions on setting up your custom HRIS integration.</p> <p>Build your user list. You can begin setting up the bulk upload file by using this template. If there are additional columns that you need, let Bonusly know and we can add them. Once you have completed the file, follow these instructions on how to upload your users.</p> <p>Important note: <i>We recommend uploading your users and check the box for "activate later".</i></p>
<p>Emails</p>	<p>Have Bonusly's IP whitelisted on your server. The emails will be coming from system@bonus.ly and our IP address is 167.89.51.93.</p>
<p>Awards and Rewards</p>	
<p>Awards</p>	<p>Configure your Awards here.</p> <p>Bonusly expands company-to-employee recognition capabilities with Automated, Manual, and Claimable Awards! Awards make it easier than ever for your company to manage your company-to-employee bonuses, and provide a space for employees to actively pursue goals!</p>
<p>Rewards Payments</p>	<p>Set up your rewards payment account here. Here is an article to help you set up rewards payments as well as a rewards calculator. We typically recommend funding your account using this formula: Number of users x Default Allowance Amount in Real World Currency x 60%.</p> <p><i>For example, if you are in the U.S., you have 300 users, and your default allowance amount is 200 points, then your formula would be: 300 x \$20 x 60% = \$3,600. Round up to the nearest available denomination in the configuration drop-down.</i></p>
<p>Custom Rewards</p>	<p>Configure custom rewards. If you will be implementing custom rewards, keep in mind that they will need to be fulfilled manually by someone at your company - so it's best to keep them simple. Here are a few articles to help you with your custom rewards:</p> <ul style="list-style-type: none"> • Custom reward best practices • Custom reward ideas



- [Adding custom rewards](#)
- [Fulfilling custom rewards](#)

Communicating Your Bonusly Launch

Why it's important

One of the most effective things you can do to ensure a successful Bonusly launch is to have a solid communications plan to launch Bonusly. If you have an internal communications team, this is a great project to loop them into!

There are a lot of great ways to announce Bonusly to your team - all-hands presentation, email campaigns, office signage, desk-drops - and your Bonusly representative is happy to advise as you build out your communication plan.

Prepare

Review the communication resources in your launch folder and begin to outline your communications plan.

Announce

Deploy communication plan to announce Bonusly.

Measure

Bonusly can send out an engagement survey to your team to measure employee engagement. Then we'll resend the survey a few months after launch and then discuss our findings with you. You can take a look at an [example survey here](#).

We also offer a learning course on "Communicating your Bonusly Launch" on learn.bonus.ly highlighting the following topics:

- What to include when communicating with your team
- How to drive adoption and create excitement
- Examples and ideas to make your launch fun and engaging
- Ways to incentivize your team using Bonusly features like Awards and Custom Rewards

Training Your Team

Manager & Champion Training

Conduct a manager and champion training session before launching Bonusly in order to generate excitement with key team members, answer questions prior to launch, and teach others how to set a great example of bonus giving as well as to help break the ice.

This is a great opportunity for you to explain why you're implementing Bonusly, what your expectations are, as well as gain buy-in and support from leaders in your company. This training session also provides an opportunity for your culture leaders to ask questions about how you'll be using Bonusly, and gives you advance insights to any concerns they have prior to launching.

The details of this training depend on what fits best for your company. Here are some ideas and resources to help you get started:



<p>Who should come?</p>	<p>Invite culture leaders to gain a sneak peek into the system and be “Bonusly champions” on launch day. These are often people managers, but not always. They may also include people who are well connected in your organization and enjoy supporting new initiatives.</p>
<p>Training Your Team cont.</p>	
<p>What to talk about</p>	<ul style="list-style-type: none"> → Why you are implementing Bonusly. → Bonusly functionality, such as giving a bonus and redeeming a reward. → How people managers can use Bonusly analytics to understand and highlight their team’s contributions.
<p>Resources to help you get started</p>	<p>Training Agenda Training Script</p> <p><i>We also offer a learning course on “Manager Training” on learn.bonus.ly highlighting the following topics:</i></p> <ul style="list-style-type: none"> → The importance of quality recognition including the recipe for giving a great bonus → How to use the Analytics Dashboard and Organization graph to gain insight into cross-departmental relationships and how your team works together → How you can use a user profile to help gather information to support performance reviews and employee growth → Ways to incentivize your team using Bonusly Awards → Best practices that will help that you can use to encourage and nurture recognition, participation, and engagement.



Admin Training

The admin training session is designed to give a high-level introduction of admin features to those who will be administering the Bonusly program post-launch. We'll introduce you to the basics of how your teammates will be using Bonusly followed by more admin specific training for functions/actions that only you'll be able to perform.

In this session, we'll learn:

- The basics of how Bonusly works and the features on the home feed
- How to give recognition and redeem earnings
- How to manage users and review user reports such as Earnings, Givings, and Participation
- How to manage recognition including reporting, editing, and deleting
- Creating and managing new Awards
- Managing Rewards and the Rewards Catalog
- How to get the most out of Bonusly Analytics

Once you've solidified the list of people who will be an admin for your Bonusly account, please [invite them to Bonusly](#) in advance of their training and [grant them admin access](#). You can find the training agenda [here](#).

Training Your Team cont.

Who should have Admin access?

While it ultimately depends on the needs of your organization, here are a few people we typically recommend:

- Finance: It can be helpful for the person who runs payroll to have access to reward redemption reports, as well as the person who may be reconciling Bonusly payments and need access to receipts or be able to update billing information.
- IT/HR Technology: When setting up and troubleshooting integrations, you'll need to be an admin in both Bonusly and the program you're integrating with. For this reason, it can be helpful to grant admin access to the person who will be setting up your social, SSO, and HRIS integrations.
- HR/Ops: You'll definitely want to grant admin access to the person responsible for day-to-day management of Bonusly. These tasks may include: user management, bonus management, reward management (including fulfilling custom rewards), and reporting on Bonusly participation and activity.

Time to Launch!

- ✓ Set your digital signage and integrations live
- ✓ Activate your users
- ✓ **Start Bonusing!** 🍷 🎉 🍷 🎉



Additional Resources

- [Learn.Bonus.ly](#) will be your number one resource to get your account set up for success!
- Check out these helpful [training videos](#) you can share with your teammates who are unable to attend the scheduled training session.
- Our [Help Center](#) is chock full of helpful instructional articles. Still have questions? Reach out to support@bonus.ly!
- Check out our [Product Blog](#) for best practice ideas and feature releases.

