Attuned

Onboarding Steps

～After order to taking Surveys～

© Copyright 2018 Attuned.ai - All Rights Reserved

After the order is placed

General Flow

1. Create Owner account
2. Start of the service
3. Preparations
4. Internal announcements
5. Surveys

attuned

© Copyright 2018 Attuned.ai - All Rights Reserved

1. Create Owner account

1. Create an account using Owner's email address. If a trial account is already created, please let Attuned know the email address.
2. Attuned creates the new account. If an existing account then Attuned will switch the trial account status to a subscribed status.

Attuned Owner: Only one person or email address can be used for the owner account. Owner has all the rights. Only the Owner can create and edit "Admin" users.

attuned

© Copyright 2018 Attuned.ai - All Rights Reserved

2. Start of the service

1. Attuned will inform the customer to notify the start of the service.
2. Contents of the notice
    - Official service start date and duration
    - Owner account information
3. Owner should;
    - Login using the initial password provided (attuned.ai)
    - Reset the initial password (From the login screen)

attuned

© Copyright 2018 Attuned.ai - All Rights Reserved

3. Preparations

1. Review and decide on users and respondents
2. Decide on the date for respondents to take the Motivator Survey
    - Around 3 days from the service start date
    - Lists of participants should be ready
    - Set the duration from 3 days to one week depending on # of respondents
3. Prepare the list (In order of priority)
    - Teams (levels)
    - Admins and Team Managers
    - Respondents

Users (Owners, Admin, Team Manager) can add respondents anytime from the dashboard.

Step 3 above is required if CSV upload is requested to Attuned CS.

attuned

© Copyright 2018 Attuned.ai - All Rights Reserved

4. Internal announcements

Please notify your managers and respondents before registering them.

1. Team Managers
    - About Attuned
    - Purpose, plan and flow
    - How managers can use Attuned
    - How to access Attuned dashboard
2. Respondents
    - About Attuned
    - Purpose, plan and flow
    - How individuals can benefit from using Attuned

attuned

© Copyright 2018 Attuned.ai - All Rights Reserved

4. Taking surveys

1. Emails are sent (respondents are added) on the planned rollout date.
2. Results will be displayed on the dashboard instantly after both Motivator and initial Engagement surveys are complete.
3. Engagement scores are displayed after more than 3 respondents have completed the survey.

attuned

© Copyright 2018 Attuned.ai - All Rights Reserved

Resources

1. Video tutorials: https://attuned.kayako.com/en-us
2. Intro to Attuned: https://www.youtube.com/watch?v=D2ykUFi2GvI&feature=youtu.be
3. Please ask your Attuned Customer Success for;
    - CSV upload files
    - Internal notice template

attuned

© Copyright 2018 Attuned.ai - All Rights Reserved