

Success Toolkit for Your Company Branded App | The Source

Table of Contents

- Build and Launch 1**
- Timing 4**
- Engagement Activities 4**
- Email and Text Templates 5**
- Adding The Source to your Phone 8**

Build and Launch

This is an employer branded app so employees will always know where to go to find company benefits, news and initiatives!

- Name your company branded app
- Add your logo

Company Branding

All employer admins can set and edit your app's branding. Your branding allows your employees to be able to recognize your app. All employees know where they work so this will drive engagement and enable them to always be able to access company news, initiatives and benefits!

Admins can configure The Source branding by accessing the existing Company Branding section from the home page of PlanSource's BenAdmin platform. From the Company Branding page, you will be able to configure your app login page, app icon, app display name, app URL, and app background image.

1. **Name your URL**

The login page URL will be used by your employees to download your app (or access it if they choose not to download it to their mobile device). The URL will be "<https://thesource.plansource.com/>" followed by your custom path. Your custom path has the following limitations:

- Maximum of 30 characters
- No spaces
- Must be unique

To make the process easy, we have defaulted your current company name as your path. We also have a real-time validator that will let you know if your chosen path is available.

Choose your custom URL path wisely. Once you have saved your customer path you are unable to edit it. Because some employees may need to type this in directly, you may want to consider a short path.

2. **What do you want your background image to be?**

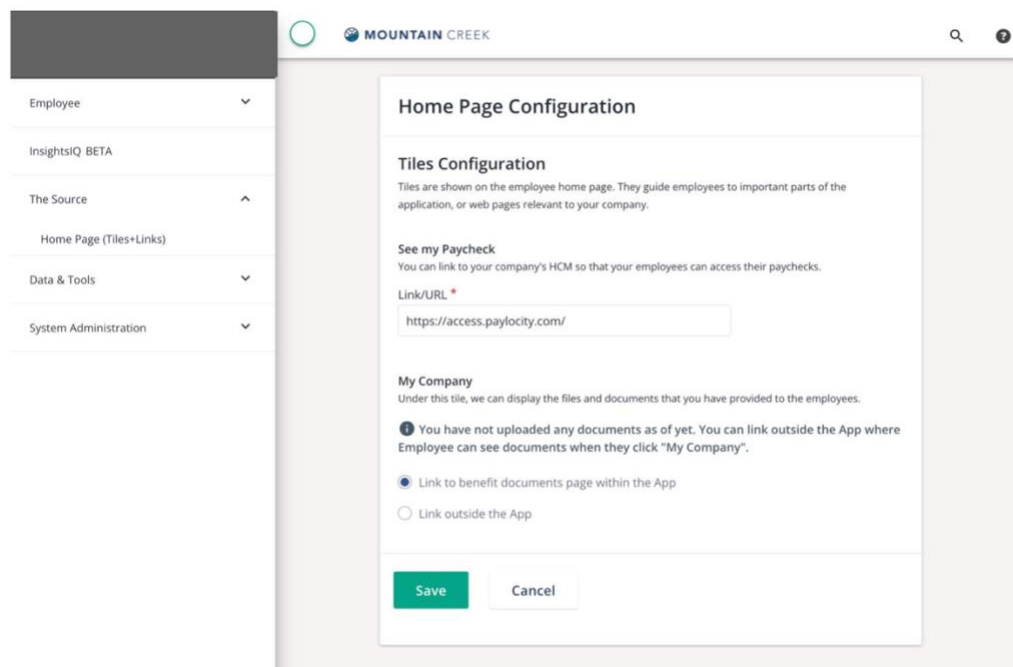
The background image is used on the login screen for your app. It allows you to add your own personality to the login experience. Your background image has the following limitations:

- Must be a .jpg or .png
- Sized less than 2MB
- Maximum dimensions of 800px high by 800px wide

To make the upload process as easy as possible, we validate that the uploaded background image meets these limitations. If an image doesn't meet these validations an error message is displayed.

- Build out the **My Benefits** Tile – This is where you get to showcase all the benefits offered. Be sure to include all your point solutions and any perk programs that you offer to employees.
- Build and Categorize the **My Company** Tile – all your company documents that have been in various places can be stored here. Note, these could be things such as your PDF documents of benefit booklets, flyers and how to guides as well as company policies and procedures.
 - You set these by expanding "The Source" from the left-side menu of PlanSource's BenAdmin and clicking the "Home Page (Tiles+Links)" navigation link.

- From this page you will be able to configure the tiles to guide your employees to important parts of The Source, or web pages which are relevant to your company.



- Build the **My Paycheck** Tile – insert a link to your payroll or HCM login provider so your employees can access through your company app.
- Build your carousel – add up to 3 items that you want front and center for your employees.
- Select location ambassadors who can help answer questions and hang the poster!
- Determine your launch population – will you start with a pilot group or send to all employees
- Prepare your launch email – pick from the templates provided below
- Send your launch email with the QR code to your launch population
- Brand and mail your launch postcard with the QR code

- Brand the poster from the template and then have your location ambassadors hang the poster with the QR Code
- Have your location ambassadors showcase the slide show on any digital monitors in office locations

Timing

Keep the momentum! Below activities should be completed within the first month of launching and adopting The Source. An ideal goal of employees using the app is about 30% of your population within the first month as measured by Weekly Active Users. We will share these metrics with you on regularly scheduled calls.

- Determine a budget and prizes for the Scavenger Hunt
- Email, push notification and text communication with details on The Scavenger Hunt
- Send out an announcement of a company activity occurring by the end of the month (ie Townhall, picnic, food drive)

Engagement Activities

Drive year-round engagement with the below ideas for activities you can do to keep employees engaged with the app. The idea is to do at least one a month.

Month	Campaign Ideas	Month and Day Opportunities
January	Kick off the New Year right!	Martin Luther King Day – 3 Monday in January
February	American Heart Month	Valentine’s Day - February 14
March	National Nutrition Month; Kidney Month; Disability Awareness Month	International Women’s Day – March 8
April	Earth Month	National Pet Day - April 11
May	Mental Health Awareness Month	Mother’s Day – Second Sunday in May
June	Immigrant Heritage Month; Pride Month	Juneteenth – June 19 Father’s Day
July	Plastic Free July	Independence Day – July 4
August	Back to School	World Humanitarian Day – August 19
September	National Suicide Prevention Month	World Suicide Prevention Day – September 10
October	National Book Month	World Hunger Day – October 16

November	Native American Heritage Month	Veteran’s Day – November 11; World Kindness Day – November 13
December		International Volunteer Day – December 5
Open Enrollment	Leverage these messages the month prior and during the month of your Company Open Enrollment	

Email and Text Templates

Send email and push/text notification out

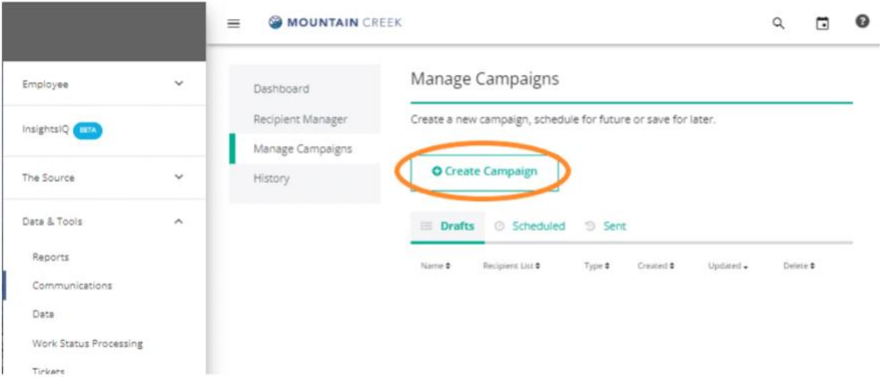
- Upload new company document or new policy and send a push notification out
- Hurricane or weather warning?
- Send a reminder out about Flex Friday
- Send a reminder out about internal meetings (Town Hall)

Employee Communications

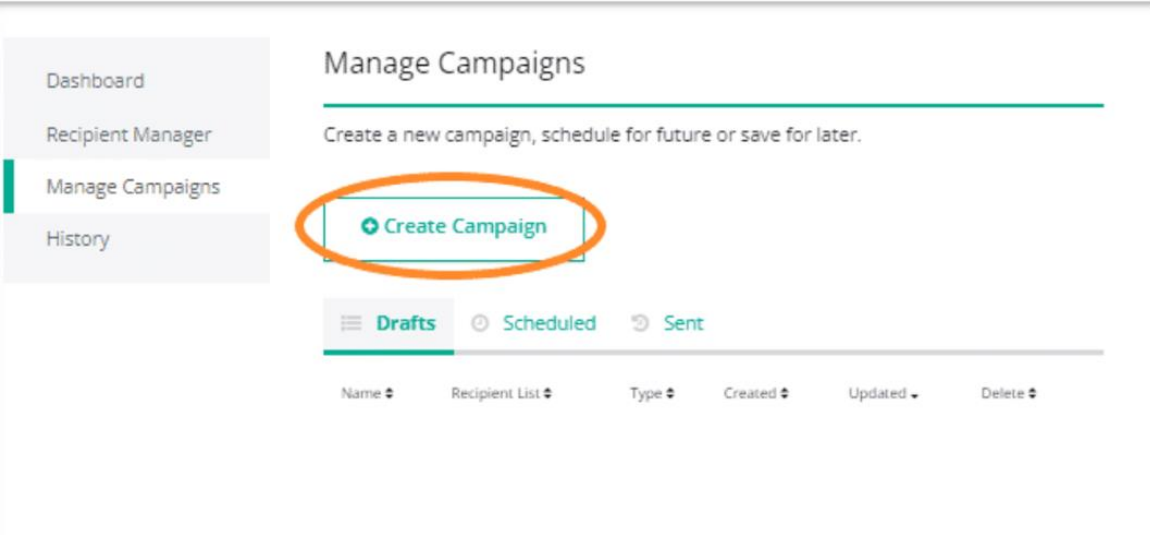
Company administrators who have access to the Communications section have the option to create app campaigns for employees who are using The Source.

1. After navigating to “Manage Campaigns” and selecting “Create New Campaign” a third checkbox allows the Admin to select “App.” From there, the Admin can opt for both ‘Push Notification’ and ‘In-app Notification,’ and add the desired content.
2. There are 5 easy steps to create campaigns. We will walk through this as part of your onboarding so be thinking of the content and messages you want to send out to your employees! For example, do you have an upcoming town hall that you want to message out? Do you want to promote an upcoming holiday? Is there a health awareness month coming up that you want to remind everyone of?

Select Campaign



You can either select an existing campaign or "Create Campaign."





Sample Email to Send to Your Employees

Subject: New Employee Engagement App – Access Now!

Copy:

Hi {{first_name}},

We are pleased to introduce a new employee engagement platform, [insert app name here] that will provide you easy access to all your benefits information and company news in a single location.

With this tool you'll be able to:

- View up-to-date announcements from HR
- Discover important numbers provided by your employer
- Locate emergency contacts
- Utilize important insurance information
- And more!

Scan the QR code below to get started. For an optimal app experience, be sure to use your mobile device to access [insert app name here].

Login Username: {{user_name}}

<insert QR code here>

IMPORTANT NOTE: iPhone users must use the **Safari browser.*

If you are reading this from your mobile device, click here. [insert url]

Sample Text Messages to Send to Your Employees

Text Campaign 1

Introducing [insert app name here]! Benefits information and [insert company name] news in a single location.

Text Campaign 2

Download the [insert app name here] here. [insert url]

Adding The Source to your Phone

To access The Source, employees will want to go to your custom URL from a web browser on their mobile device. Your custom URL will be provided to you during the setup.

Pro Tip for Admins:

Your custom URL can be distributed in limitless ways including flyers, emails, or text messages. We recommend being creative and using a frequent multi-distribution strategy to drive awareness and increase how many employees use your app.

For The Source, employees will use their existing PlanSource credentials that were established for PlanSource Enrollment. This approach removes confusion and eliminates the need for you to establish new credentials for your employees.

When we recognize employees are using your custom URL on a mobile web browser instead of the app, they will be prompted to add your app to their mobile device. Once completed, employees will be able to directly access your app from your icon on their mobile device.

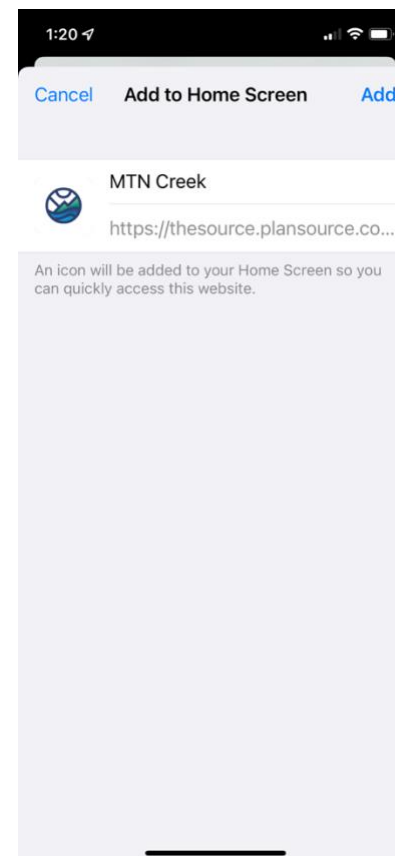
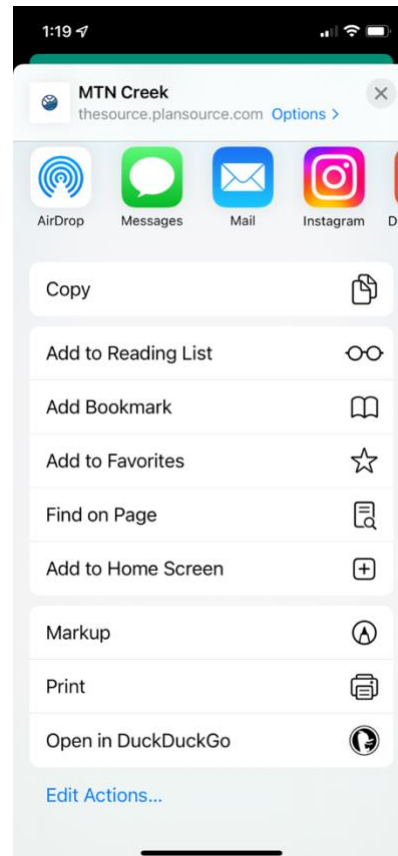
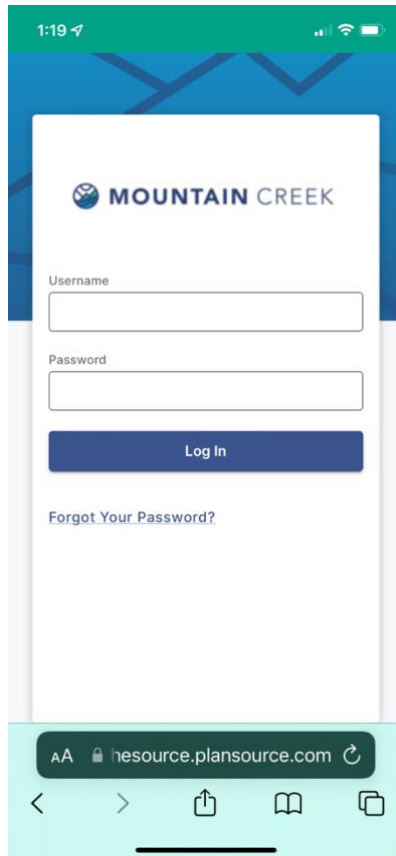
The experience is controlled by the device and operating system your employees are using. Expand to see the table below for details on this for Android versus Apple.

Below is how The Source/App Name** is added on Android and Apple devices. Replace the images with screenshots of your app experience, URL, and branding if you'd like.**

Apple Instructions

Apple users are not prompted to add the app. To access the app, users will want to follow this three-step process.

1. Click the share icon on your browser. This will open an OS drawer at the bottom of the device.
2. Scroll down to and select the “Add to Home Screen” option. This will save the app to your phone.
3. Confirm by clicking “Add”



Android Instructions

Android users are automatically prompted to add the app to their device through a pop-up that appears on the login page. This experience is native to the Android OS and cannot be controlled.

1. You will be automatically prompted to add the app. Clicking the prompt will start the process.
2. Click “Install”
3. Confirm by clicking “Add to Home Screen”

