

# Your 10-Step Onboarding Journey with Bucketlist

Welcome to Bucketlist! Your rewards and recognition journey starts here. With a dedicated customer onboarding manager supporting you every step of the way, onboarding averages only 8-16 hours of your time over 6-10 weeks.

Here's what to expect in the first several weeks with Bucketlist.

## Stage 1 | 2-3 Weeks

1

### Project Kick Off

During project kick off, we'll design your project plan, define task ownership deliverables, and add due dates.

2

### Admin Training

Your HR leaders and managers will take part in admin training of the platform to learn all the features and functionalities of Bucketlist. Learn at your own pace with bite-sized on-demand videos that you can reference at any time.

Program administrators will collect internal feedback, and the onboarding team will make suggestions and revisions to the program based on company needs and preferences.

## Stage 2 | 3-4 Weeks

3

### Budget and Award Mapping

Allocate your budget to each program feature, linking awards and rewards to meaningful actions. For example, if you want to encourage employee referrals, build a referral program that will provide monetary rewards for people who bring in potential new customers. This will ensure your company celebrates achievements in a purposeful and impactful way.

The onboarding team will provide a budget calculator and a list of awards suggestions to make this step a breeze.

4

### HRIS and Integrations Set Up - IT Team

At this time, we'll help your IT team set up the user provisioning solution and import employee data. IT will install SSO and communication tools, if applicable. Testing will occur to validate functionality.

5

### Set up Your Reward Marketplace

Bucketlist offers 4,000+ reward options, including gift cards, corporate swag, experiences, and donations. At this time, we'll add your chosen reward options to your Reward Marketplace. We'll also confirm the personalized rewards you want to offer (think: VIP parking spot or the CEO Calls Your Mom).

## Stage 3 | 1-2 Weeks

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### Recruit Ambassadors

Allocate your budget to each program feature, linking awards and rewards to meaningful actions. For example, if you want to encourage employee referrals, build a referral program that will provide monetary rewards for people who bring in potential new customers. This will ensure your company celebrates achievements in a purposeful and impactful way.

The onboarding team will provide a budget calculator and a list of awards suggestions to make this step a breeze.

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### Build Your Communication Plan

Start communicating the upcoming program to the company via emails and posters. Use our email templates or printable posters and flyers to make this step easy.

8

### Pre-launch Training

Schedule training sessions with ambassadors, employees and managers. Your package may include live training or pre-recorded video training sessions.

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### Program Quality Assurance

As the last step before launch, conduct quality assurance with Bucketlist to ensure accurate program setup and implementation. You want to create a positive first impression and experience, so QA is critical.

10

### Launch

Congratulations! Your new rewards and recognition program is officially live. Now's the time to provide company-wide training to all employees. Explain the program details, features, and capabilities. Walk them through your rewards marketplace, how recognition can be shared and where, and how to redeem points. Turn on integrations and send out welcome emails. Build excitement.

## Stage 4: Post-Launch Support

**We have no doubt your program launch will be a resounding success!** Once your program is up and running, we'll still be with you every step of the way.

### Here's what to expect:

- We're here for you 24/7 with our world-class customer support team.
- You can count on us to address your questions and needs promptly.
- You will receive guidance with program refinement to ensure your program delivers maximum impact.
- For eligible plans, we provide quarterly business reviews (QBRs) to share the success of your program with you and your leadership team.