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Date: March 27, 2020

Client: O.C. Tanner

Project: Communications Play #30 LEADERS: Initiatives Capability for Victories™

* Emails X 4
* Flyer
* Talking Points (PPT slide) for Senior leaders to manager

<email to leaders #1>

Subject line:

*{{ Company Name }} is introducing a great way to reward and inspire your teams!*

**READY. SET. RALLY YOUR TEAM**.

Initiatives is a great capability within {{ ProgramName }} that makes it easy for managers and admins to rally teams around a common goal, project, or challenge. Simply set up your own focused initiative, invite participants, decide on project milestones and award levels, and reward success from a pre-approved budget of award points.

Best of all, Initiatives is designed to be completely self-serve, from set-up and branding to budget control. So, what would you like to accomplish? From safety programs to innovation efforts, short-term incentives to long-term goals, now you can build an initiative in minutes and run it as you’d like.

Get started today at {{ ProgramName }}

<email to leaders #2>

Subject line:

*Ready to build a self-service recognition initiative for your team?*

**CREATING A RECOGNITION INITIATIVE**

Ready to create an initiative for your team to get behind? It’s easy to set up a common challenge, project, or goal to rally around—here’s how:

1. Visit {{ ProgramName }} > Programs > Initiatives
2. Click Request Initiative
3. Name your initiative, designate an owner(s), specify a points budget, and add relevant desired outcomes, details, and criteria
4. Select a pre-designed banner or upload a unique image to the home page
5. Invite participants and if desired give each a points budget for peer-to-peer (team) recognition
6. Create awards and designate permissions and points for each
7. Change the initiative status from Inactive to Active
8. Done! Participants are automatically notified that they are part of the project

Get started today at {{ ProgramName }}

<email to leaders #3>

Subject line:

*Ready to rally the power of your team around a common purpose?*

**CREATE AN INITIATIVE. MOTIVATE YOUR TEAM.**

Creating a focused initiative within {{ ProgramName }} is a great way to engage everyone on your team. Not only does it underscore team priorities and point everyone in a common direction, it rewards them for meeting key objectives along the way.

Visit {{ ProgramName }} > Programs > Initiatives to set up your challenge, define criteria, establish a budget, and invite participants.

Recognition for the accomplishments and progress goals you’ve designated is automatically posted to your project’s dedicated social feed—a great space for team members to celebrate success and cheer each other on.

Want to encourage even more social activity? Get everyone in the game by giving team members their own points allowance to award. Peer-to-peer recognition is a proven way to build connections and trust.

Get started today at {{ ProgramName }}

<email to leaders #4>

Subject line:

*Tips for running a recognition initiative the whole team will get behind*

If you’ve set up a great challenge, goal, or project for your team using the Initiative capability within {{ ProgramName }}, now it’s time to make it a resounding success.

Here’s how to get the most out of your team’s initiative:

* Make it a worthy goal and set clear objectives and expectations
* Post a kick-off/welcome message on the project’s dedicated social feed
* Feature your initiative page at a team meeting/huddle and encourage everyone to sign in and make a comment
* Present awards visibly and celebrate success together as a team
* “Like” or comment on team postings on the feed to encourage continued engagement
* Create customized award images by uploading unique imagery or photos
* For larger projects, find and train advocates to keep the momentum high

Get started today at {{ ProgramName }}.

< email to accompany flyer—content only. Not part of the designs in this play >

Subject line:

*Introducing Initiatives, a great way to reward and inspire your teams!*

**READY. SET. RALLY YOUR TEAM.**

Initiatives, a great capability within {{ ProgramName }} makes it easy for leaders to rally teams around a common goal, project, or challenge.

Take a look at the attached flyer for step-by-step directions on building your own focused initiative, along with tips for getting the most out of it. It’s a quick read, and a great resource for referring to time and again.

What would you like to accomplish? Get started today at {{ ProgramName }} > Programs > Initiatives.

<flyer >

**CREATE AN INITIATIVE. MOTIVATE YOUR TEAM.**

The Initiatives capability within {{ ProgramName }} makes it easy for managers and admins to rally teams around a common goal, challenge, or project. From safety programs to innovation efforts, short-term incentives to long-term goals, now you can build an initiative in minutes and run it as you’d like.

**EASY SELF-SERVE SET-UP**

* Visit {{ ProgramName }} > Programs > Initiatives
* Click Request or Create Initiative
* Name your initiative, designate an owner(s), specify a points budget, and add relevant desired outcomes, details, and criteria
* Select a pre-designed banner or upload a unique image to the home page
* Create awards and designate permissions and points for each
* Invite participants and if desired give each a points allowance for peer-to-peer (team) recognition
* Change the initiative status from Inactive to Active
* Done! Participants are automatically notified that they are part of the project

**PRE-APPROVED POINTS BUDGET**

* Create your initiative with a pre-approved number of points to award
* Designate guidelines and criteria for when and why points will be awarded
* No approval or nomination process: points are deposited to recipients’ accounts as soon as they are awarded
* Assign an allowance of points to each participant to encourage peer-to-peer (team) activity if desired

**SOCIAL, CUSTOMIZABLE, ENGAGING**

* Brand your initiative by uploading a custom banner image, award images, and description text to fit your audience and project goals
* Create initiative-specific awards to make each challenge fun and unique
* Post congrats, updates, questions, and images to a dedicated social wall for other team members to view and comment on

Get started today at {{ ProgramName }}

<PPT senior leader or HR head to manager/admin audience >

[cover]

INTRODUCING INITIATIVES

a new feature {{ ProgramName }}

[ slide #1]

**CREATE AN INITIATIVE. MOTIVATE YOUR TEAM.**

* New capability within {{ Program Name }}
* Rally teams around a common goal, challenge or project
* Build your own focused recognition program around initiatives like Safety, Wellbeing, Security—any business goal you’d like
* Easy, self-serve

**Talk points:**

The Initiatives capability within {{ ProgramName }} makes it easy for managers and admins to rally teams around a common purpose. From safety programs to innovation efforts, short-term incentives to long-term goals, build an initiative in minutes and run it as you’d like.

[ slide #2]

**GETTING STARTED**

* Visit {{ ProgramName }}
  + Select Programs
  + Select Initiatives
* Click Create Initiative

Talk points:

Programs page is accessed from the top menu bar on {{ ProgramName }}

[slide #3 create your initiative form]

**CREATE YOUR INITIATIVE**

**DECIDE ON INITIATIVE NAME, OBJECTIVES, AWARD CRITERIA, BUDGET AND PROJECT OWNER(S)**

**Talk points:**

* Create a name for your challenge
* Write a short paragraph outlining the project’s goals. Best practice tip: Make sure to set a worthy goal for your initiative and specify clear objectives and expectations
* In many cases, you as leader will be the project owner. If your initiative is a larger team effort, enroll other advocates to help ensure success

[slide #4 zoom in or otherwise highlight the points feature]

**MANAGE BUDGETS**

**DESIGNATE A BUDGET AND STRUCTURE AS YOU’D LIKE**

**Talk points:**

* Send your proposed budget to {{ ProgramName}}’s administrator to secure budget approval
* Once approved, you have total budget control
* Give points according to the guidelines you have designated. There are 2 options:
  + Control awards given yourself or —
  + Empower and inspire peers to recognize each other by giving each a points allowance as shown here
* No nomination or approval necessary
* Points deposit into recipient accounts as soon as they are given
* Social-only awards can also be used to engage and encourage effort

[slide #5]

**MAKE IT CUSTOM**

**GIVE YOUR INITIATIVE A UNIQUE LOOK AND FEEL**

**Talk points:**

* Add custom branding—it’s a great chance to make your initiative stand out and to engage participants.
* Home page banner image, award images, and program description are all customizable
* Think simple: find stock photos online that represent what you are trying to achieve or take a photo of the team
* You can choose from a variety of system banners as well

[slide #6 ]

**CREATE AWARDS**

**MAKE EACH CHALLENGE FUN AND UNIQUE**

Talk points:

* Create awards to make each challenge fun and unique and designate points for each
* Add custom award level images if desired

[slide #7]

**ADD PARTICIPANTS**

**SELECT TEAM MEMBERS TO INVITE {{ AND GIVE EACH A POINTS BUDGET FOR PEER-TO-PEER (TEAM) RECOGNITION }}**

**Talk points:**

It’s easy to invite people via a CSV file, Bulk Add or your Reporting tree.

{{ Peer-to-peer recognition is a great way to drive enthusiasm and encouragement. Get everyone in the game by giving each a small allowance of points to reward fellow team members. }}

[slide #8]

**ACTIVATE AND GO**

**CHANGE INITIATIVE STATUS FROM INACTIVE TO ACTIVATE AND GO!**

Talk points:

That’s it! Participants are automatically notified that they are part of the project.

[slide #8]

**MAKE IT SOCIAL**

**POST THE FIRST MESSAGE TO YOUR PROJECT’S DEDICATED SOCIAL FEED**

Talk points:

* A great feature of Initiatives is the social feed. Every initiative has its own social “wall” where participants can see accomplishments and cheer each other on
* Get the momentum started with a short “Welcome!” post — upload an image too if you’d like
* Recognition posted to the social wall on your initiative’s home page appears only there—not on the main social wall of {{ ProgramName ]]

[slide #9]

**RECOGNIZE ACCOMPLISHMENTS**

**CELEBRATE PROGRESS AND GOALS WITH AWARD RECOGNITION**

Talk points:

Recipients are notified by email (shown here). Award recognition is also automatically posted to the project’s social feed for the whole team to view and comment upon.

[slide #10]

**THANKS FOR TAKING ADVANTAGE OF THIS GREAT OPPORTUNITY TO RALLY YOUR TEAM AROUND AN INITIATIVE!**

Get started today with {{ ProgramName }}