

IMPLEMENTATION

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GENERAL EXPLANATION

flair is a complete and flexible HR software that adapts to the customer's requirements and helps them to optimize their processes. Due to our expertise in HR and Salesforce, we are able to offer technical expertise in addition to an optimal solution and thus also act as a Trusted Adviser for our customers.

flair's support capabilities offer numerous benefits to customers and various user groups. Some of these benefits include:

1	TIME SAVINGS Using the "train the trainer" model and the availability of the flair Learning Hub as a self-service option, customers can resolve issues faster and save time and resources.
2	INDEPENDENCE Access to training materials and resources in the flair Learning Hub allows customers to solve problems on their own, giving them more control and flexibility.
3	COST SAVINGS Customers can resolve issues themselves, the need for additional support can be reduced, resulting in cost savings.

Overall, flair's support capabilities provide faster and more effective problem resolution, more independence and flexibility, as well as cost savings and increased productivity for our customers and various user groups. This is true for both HR admin users, who are empowered to resolve issues on their own through the "train the trainer" model and access to training materials and resources in the flair Learning Hub, and end users, who benefit from increased productivity and support from HR admin users.

An Implementation Manager at flair is responsible for the technical setup, onboarding and training of admin users of the software. This role has the following responsibilities:

TECHNICAL SETUP

The Implementation Manager is responsible for the technical configuration of flair, including setting up user accounts, implementing data and clarifying possible integration points with other systems.

ONBOARDING

The Implementation Manager is responsible for the process of onboarding new clients. This includes working with the customer to understand their requirements, creating a project plan, and providing training to admin users.

TRAINING

The Implementation Manager is responsible for training the admin / key users. This includes handing over training materials and conducting training to ensure admin/ key

users are able to use the software properly.

PROJECT MANAGEMENT

The Implementation Manager is responsible for project management of the technical setup, onboarding and training. He/she coordinates the work of different departments and ensures that projects are completed on time and within budget.

SUPPORT

The Implementation Manager also provides support during the implementation phase and answers admin users' questions and assists them in resolving issues.

Overall, the Implementation Manager at flair has the responsibility to ensure that new customers are successfully migrated to the software and that the Admin Users are able to use the software. He/she works closely with the customer and the support team to ensure that the implementation is successful and that customer satisfaction is guaranteed.



IMPLEMENTATION AT flair

Implementation at flair is designed to quickly and successfully migrate new customers to the software and ensure they are getting the most out of it. It includes training, technical support, and resources to ensure the customer is successful. It includes a number of activities designed to successfully migrate new customers to the HR software. A direct and collaborative co-operation in the completion of mutual tasks, the supply of required information and independent implementation of required system configurations on the customer's side is assumed.

Some of the content that the client can expect during the onboarding process include:

1. REQUIREMENTS ANALYSIS

The Implementation Manager will discuss with the customer to understand their requirements for the software and create a project plan that meets the customer's requirements.

2. TECHNICAL SETUP

The Implementation Manager will perform the technical configuration of flair.hr, including setting up user accounts, customizing visibility settings, and setting up integration points with other systems such as Slack.

3. TRAINING

The Implementation Manager will provide training to admin / key users to ensure the software is configured correctly and fully operational, with advanced features and additional support / consulting being beyond the scope of the initial implementation. This training can be in the form of online webinars, remote training, or on-premise training (if contractually agreed upon the implementation).

4. DOCUMENTATION AND RESOURCES

The Implementation Manager will provide the customer with documentation and resources to help them understand and use the software.

5. GO-LIVE SUPPORT

The Implementation Manager will support the customer before the go-live process through a Q&A Meeting and ensure that the software goes live successfully and the responsible HR admins can start their work with flair successfully.

6. (OPTIONAL) POST-IMPLEMENTATION SUPPORT

The Customer Success Department will support the customer up to 4 weeks after the implementation and help with any questions or issues that may arise during operation (not part of the Standard Implementation).

COLLABORATION

💡 What requirements must be met on the customer side so that flair can be implemented successfully?

In order to successfully implement flair, certain requirements must be met on the customer side. Some of these requirements are:

BUSINESS REQUIREMENTS

The customer should clearly define their business requirements and goals that they want to achieve with the implementation of flair so that the implementation team can take them into consideration.

PROCESS ANALYSIS

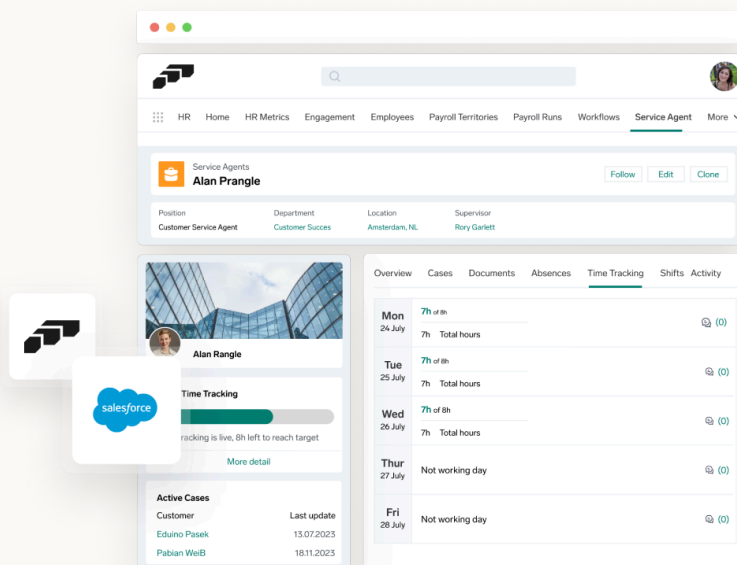
The customer should analyze their existing HR processes and identify which processes should be automated or changed. This will help the implementation team create a project plan that meets these requirements.

RESOURCES

The customer needs to provide the necessary resources to execute the implementation of flair, including staff, time and budget for any customization outside of standard implementation.

TRAINING

The customer should ensure that their staff is properly trained to use the software successfully. flair therefore offers admin training for the admin users during the implementation. It is required at all times that the admin / Key users and the associated project managers follow the training, carry out the required training themselves and are well prepared for each subsequent training.



“TRAIN THE TRAINER”

The "train the trainer" model method, where only the HR admin users are trained (usually up to 2) and they then act as the first point of contact for first level support, has several advantages:

1. TIME SAVINGS

By training the HR admin / key users themselves, they can share their knowledge with other employees and resolve issues faster. This saves time and resources that would otherwise be spent on training and support.

2. SPEED

HR admin users know the software best, enabling them to identify and resolve issues faster. They also better understand the needs of other employees and provide support accordingly.

3. COST SAVINGS

By training only the HR admin / key users and then having them act as the first point of contact for first level support, costs for training and support can be reduced.

4. SELF-SERVICE

By making HR admin / key users the first point of contact for support requests, they can resolve issues more quickly, reducing dependency on external support.

5. KNOWLEDGE SHARING

Admin users can use video footage from onboarding to train new colleagues internally and use the flair Learning Hub to efficiently onboard and train new employees.



IMPLEMENTATION

 Let us walk you through it step by step

flair.hr's general project delivery approach is focused on generating added value throughout the project duration. The end goal is always leading throughout all project phases.

flair.hr's software is designed to be user friendly and intuitive. This results in minimal training times. In order to give first guidelines and FAQ, access to knowledge base articles and a video tutorial library will be made available within flair.hr's Learning Hub. Additionally a digital project board (e.g. Notion) will be part of the implementation process to guarantee a transparent view on all tasks, customer homework, project status and meeting minutes.

These services are required to implement the project and enable access to the software system and flair.hr's Learning Hub. Training services are provided remotely via Video Call session.

This document outlines the technical implementation of the selected module for your system. Our approach ensures that the integration is seamless, minimizes disruption, and enhances the overall functionality of your existing infrastructure.

SCOPE OF IMPLEMENTATION

The implementation will focus solely on the selected module in the order form. This module has been identified as critical to achieving your desired outcomes and aligns with your current system architecture.

- Kick-off call
- Optional: Scoping Workshop
- WP 1: System Configuration - technical Setup
- WP 2: HR Administration Module
- WP 3: Attendance Module
- WP 4: Payroll Module
- WP 5: Shift Planner Module
- WP 6: Performance Management Module
- WP 7: Recruiting Module
- Final Onboarding & Q&A

KICK-OFF CALL

GENERAL INTRODUCTION

- Introduction flair.hr and project team including the project ownership
- Involved stakeholders and key users of the flair.hr

PROJECT INTRODUCTION

- Project scope, success criteria & overall expectations
- Proposed work packages (WPs), use cases & business deliverables per WP:
- Revision of initial (high-level) project plan and key milestones

PROJECT ORGANIZATION

- Project organisation and reporting – weekly project status calls & reporting requirements
- Clarification on project team availabilities, timeline requirements & deadlines
- Introduce and set up a project board (in Notion)
 - Goal of the board:
 - Joint collaboration or communication
 - Control of questions regarding standard implementation (customer)
 - Control of custom requirements after prior consultation (customer)
 - Access to training videos
 - Access to meeting notes
 - Uploading relevant documents for onboarding
- Authorized: defined by customer (Required: Salesforce Admin, Optional: HR)
- Availability: Project

PROJECT PREPARATION & NEXT STEPS

- Use permission sets to customize who can access different types of HR data and company information. For example, an accounts manager might only be granted access to donor information and financial records in a specific location.

WP 1: SYSTEM CONFIGURATION - TECHNICAL SETUP

SESSION 1:

INTRODUCTION INTO FLAIR AND THE EMPLOYEE HUB

Data import:

- Less than 30 employees: The client manually creates the employees in the system with guidance from flair during the first Training Session. More than 30 employees:
 - Option 1: Handover the data by using the flair data import template (mandatory) - deviations from the template and additional support regarding the data import will be charged additionally.
 - Import of employee data (max. 500 records)
 - Option 2: the client imports the employee data themselves.
- Creation of up to 5 user profiles (Salesforce Admin, HR Manager, Recruiting Manager, Employee, Manager)
- Add additional 10 employee fields and change page layout once for non Salesforce customer (for SF customer, this does not apply)
- Creation of 1 employee
- Definition of next steps, tasks and responsibilities

WP 2: HR ADMINISTRATION MODULE

SESSION 1:

INTRODUCTION INTO EMPLOYEE ONBOARDING, DOCUMENTATION, AND HR ANALYSIS

- Revision of work package scope, overall expectations, agreed milestones & success criteria.
- Revision proposal for Design Schedule Creation use case solution:
 - Document Management
 - Implementation Training Videos
 - Creation of 1 Document Upload
 - Workflows
 - Implementation Training Videos
 - Create 1 Onboarding Workflow
 - Reporting and Dashboards
 - Showing and coaching how to use the standardized reporting templates
- Clarification of open questions & identification of any further fine-tuning activities required.
- Track & guide the self-learning process.

WP 3: ATTENDANCE

SESSION 1:

INTRODUCTION INTO ABSENCE MANAGEMENT

- Revision of work package scope, overall expectations, agreed milestones & success criteria.
- Introducing into the training videos for implementation
- Revision proposal for Design Schedule Creation use case solution:
 - Absence Management
 - Training videos for implementation
 - Creation of 3 Absence Categories (Vacation, Sickness, Overtime)
 - Creation of 1 Accrual Policy
- Clarification of open questions & identification of any further fine-tuning activities required.
- Track & guide the self-learning process.

SESSION 2:

INTRODUCTION INTO TIME TRACKING

- Revision of work package scope, overall expectations, agreed milestones & success criteria.
- Introducing into the training videos for implementation
- Revision proposal for Design Schedule Creation use case solution:
 - Absence Management
 - Training videos for implementation
 - Creation of 3 Absence Categories (Vacation, Sickness, Overtime)
 - Creation of 1 Accrual Policy
 - Time Tracking
 - Implementation Training Videos
 - Create 1 Workload Template (Full Time)
- Clarification of open questions & identification of any further fine-tuning activities required.
- Track & guide the self-learning process.

WP 4: PAYROLL MODULE

SESSION 1:

INTRODUCTION INTO PAYROLL MANAGEMENT

- Revision of work package scope, overall expectations, agreed milestones & success criteria.
- Introducing into the training videos for implementation
- Revaluation of proposed use case solution with focus on value added:
 - Payroll Territory
 - Implementation Training Videos
 - Creation of 1 Payroll Territory
 - Payroll Run
 - Implementation Training Videos
 - Creation of 1 Payroll Territory (Example only)
- Clarification of open questions, next steps & further input requirements.
- Track & guide the self-learning process.

WP 5: SHIFT PLANNER MODULE

SESSION 1:

INTRODUCTION INTO SHIFT PLANNING

- Revision of work package scope, overall expectations, agreed milestones & success criteria.
- Introducing into the training videos for implementation
- Revaluation of proposed use case solution with focus on value added:
 - Pre-defined Shifts
 - Implementation Training Videos
 - Creation of 1 pre-defined shift
- Clarification of open questions, next steps & further input requirements.
- Track & guide the self-learning process.

WP 6: PERFORMANCE MODULE

SESSION 1:

INTRODUCTION INTO EMPLOYEE SURVEYS AND SKILLS

- Revision of work package scope, overall expectations, agreed milestones & success criteria.
- Introducing into the training videos for implementation
- Reevaluation of proposed use case solution with focus on value added:
 - Skills
 - Implementation Training Videos
 - Creation of 1 skill
 - Surveys
 - Implementation Training Videos
 - Creation of 1 survey
- Clarification of open questions, next steps & further input requirements.

SESSION 2:

INTRODUCTION INTO GOALS AND PERFORMANCE REVIEWS

- Revision of work package scope, overall expectations, agreed milestones & success criteria.
- Introducing into the training videos for implementation
- Reevaluation of proposed use case solution with focus on value added:
 - Goals
 - Implementation Training Videos
 - Creation of 2 Goals (Company and Team OR Individual Goal)
 - Performance / Peer Review
 - Implementation Training Videos
 - Creation of 1 Performance Review OR Peer Review
- Clarification of open questions, next steps & further input requirements.
- Track & guide the self-learning process.

WP 7: RECRUITING MODULE

SESSION 1:

INTRODUCTION INTO RECRUITING BASICS

- Revision of work package scope, overall expectations, agreed milestones & success criteria.
- Introduction into Initial setup of funnel stages
- Introduction to scheduling candidate emails
- Introducing into the training videos for implementation
- Reevaluation of proposed use case solution with focus on value added:
 - Career Portal
 - Implementation Training Videos
 - Introduction to the career portal
 - The client can create up to 3 Career Portals within the flair Standard package
 - Jobs
 - Implementation Training Videos
 - Creation of 1 Job
 - Candidates
 - Creation of 1 Candidate
 - Scheduling Emails
 - Creation of 1 Scheduled Email
- Clarification of open questions, next steps, further input requirements
- Track & guide the self-learning process.

SESSION 2:

RECRUITING ADD-ON (OPTIONAL)

- Revision of work package scope, overall expectations, agreed milestones & success criteria.
- Introduction into Initial setup for e.g.:
 - Talent Pool
 - Evaluations - Pre-Screening
 - Multiposting
 - Chrome Recruiting Plugin
 - Bring your own Contract
 - CV Parsing
- Implementation for Recruiting Add-on Modules based on the contract selection
- Introducing into the training videos for implementation
- Clarification of open questions, next steps & further input requirements.
- Track & guide the self-learning process.

FINAL ONBOARDING AND Q&A

- Revision of work package scope, overall expectations, agreed milestones & success criteria.
- Answering open questions which are part of the implementation scope
- After concluding the Implementation the Implementation Manager will handover the client to flair's Support Team for technical support

DOCUMENTATION:

flair.hr will provide online access to system documentation and training material to the Customer team to support a "train the trainer" environment.

SETUP OVERVIEW

WP	Project Phase	Standard	Premium
	Kickoff	1x Meeting (60 minutes)	2x Meetings (120 minutes)
1	Technical Setup		
	Import employee data (> 30 employees)	500 Data sets	2000 Data sets
	Setup User profile	5 User profiles	10 User profiles
	Import Coaching		1x Meeting 60 minutes
	Adding employee fields	10 Fields	20 Fields
	Adjust Page Layout	Onetime	3x Changes
	Manual Employee Creation	1x Employee	1x Second (Update) Import with max. 500 data sets
2	HR Administration Module	1x Meeting (60 minutes)	1x Meeting (60 minutes)
	Upload Documents	1x Document (3 different upload options)	1x Document (3 different upload options) + configure 1x custom Mass Upload
	Create Workflows	1x Onboarding Workflow Templates (max. 2 Tasks)	3x Workflow Templates (max. 3 Tasks each)
3	Attendance Module	2x Meeting (120 min)	3x Meetings (180 min)
	Create Absence Categories	3x Absence Categories (Vacation, Sick Leave, Work From Home)	5x Absence Categories (Vacation, Sick Leave, Work From Home, 2x Custom)

	Create Accrual Policies	1x Accrual Policy	3x Accrual Policies
	Create Workloads	1x Workload (Fulltime)	2x Workloads (Fulltime, Parttime)
	Create Time Framework	1x Time Framework	2x Time Frameworks
	Enable Overtime Settings	1x Flexitime Balance 1x Overtime Category	1x Flexitime Balance 2x Overtime Category
	Create Reports & Dashboards	flair Standard Reports and Dashboards	1x Custom Report
4	Payroll Module	1x Meeting (60 minutes)	1x Meeting (60 minutes)
	Create Payroll Territory	1x Payroll Territory	2x Payroll Territories
	Create Payroll Run	1x Payroll Run (Example only)	2x Payroll Runs (Examples only)
5	Shift Planner Module	1x Meeting (30 minutes)	2x Meetings (60 minutes)
	Create pre-defined shifts	1x Pre-defined shift	3x Pre-defined shifts
6	Employee Development	2x Meetings (120 minutes)	3x Meetings (150 minutes)
	Configure Skills	2x Skills	3x Skills
	Create Surveys	1x Survey	2x Surveys
	Create Goals	2x Goals	3x Goals
	Create Performance Reviews	1x Performance Review or Peer Review	1x Performance Review 1x Peer Review
7	Recruiting Module	2x Meetings (120 minutes)	3x Meetings (180 minutes)

	Create Career Portal	Configure 1x Career Portal (2 Portals in total allowed)	Configure 1x Career Portal (4 Portals in total allowed)
	Create a Job	1x Job	1x Job
	Configure the Funnel Stage	1x Standard Funnel Stage Activation	1x Adjustment Custom Funnel Stages
	Create a Candidate	1x Candidate	1x Candidate
	Schedule Emails	flair Standard Email Templates	1x Custom Email Template
	Create a Talent Pool	1x Talent Pool	1x Talent Pool
	Create an Evaluation	1x Evaluation	2x Evaluations
	Activate Multiposting	Activation	Activation
	Activate the Chrome Recruiting Plugin	Activation	Activation
	Final Onboarding & Q&A	1x Meeting (60 minutes)	2x Meetings (120 minutes)
	Post-Implementation Support		2x Meetings (90 minutes)

OPTIONAL ADDITIONAL INTEGRATION SERVICES

In addition to the offered subscription to our solutions, flair.hr also offers Managed Services Packages (based on flair.hr standard man day rates) for e.g. getting the required input for customer requests (e.g. flows etc.). These can be booked on demand, at any time during the project.

For the avoidance of doubt, the Managed Services can be booked on demand for specific requests. Furthermore, flair.hr offers standardized Managed Service packages as defined below. All options can be discussed during the project and booked at any time.

PACKAGE 1: INPUT DATA

(For historical employee data or secondary data sets)

- Assess data quality & availability of the required input data based on provided data checklists per WP.
- Recommend data sources for missing data & assist on data formatting to enable data upload into the system.
- Approx. 1 – 2 Man days (MD) (individual estimation will be made depending on specific customer requirements).

PACKAGE 2: SINGLE SIGN ON

- Setting up the single sign-on, which allows the user to log in once and access services without re-entering authentication factors.
- Approx. 1 MD (individual estimation will be made per customer requirements).

PACKAGE 3: OUTLOOK INTEGRATION

- Setting up the outlook integration, which allows the user to send emails and schedule meetings. Approx. 1 – 2 MD (individual estimation will be made per customer requirements).

PACKAGE 4: DATAFOX

- Setting up the integration of the datafox Time Tracking Terminals
- Approx. 1 – 2 MD (individual estimation will be made per customer requirements).

PACKAGE 5: DATEV

- Setting up the integration of the DATEV Export-Import-Process
- Approx. 1 – 2 MD (individual estimation will be made per customer requirements).

PACKAGE 6: PROCESS OPTIMIZATION ON BEST-PRACTICE HR

- Scope/Deliverables:
 - Consolidate customer requirements,
 - Design a solution and or a process setup,
 - Present the process to the customer,
 - Assess and explain presented results,
 - Optional: Lead or support management/stakeholder presentation.
- Approx. 2 – 4 MD (individual estimation will be made per customer requirements).

PROJECT PLAN

flair.hr provides a project timeline for the finalization of the project within 2-4 weeks after receiving the customer's written and binding project order.

A final and detailed project plan will be drawn up together with the client and discussed during the kick-off. A close cooperation between Customer and flair.hr's project team is required for the entire project in order to accomplish objectives as well as to satisfy requirements as accurately as possible.