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Templates

Agenda

- **A bit of history**
- **How templates are built**
- **How templates can be used**
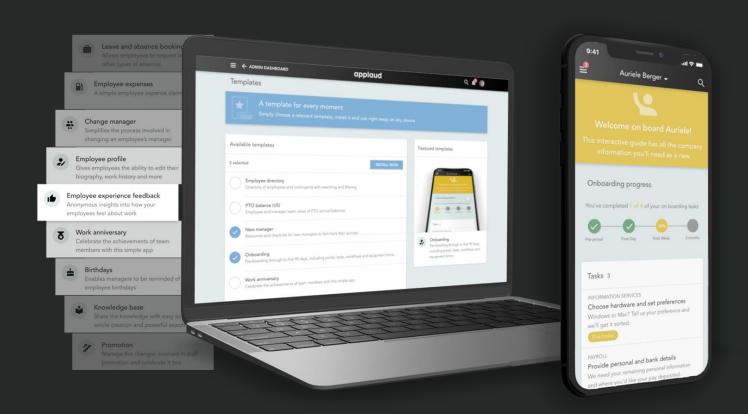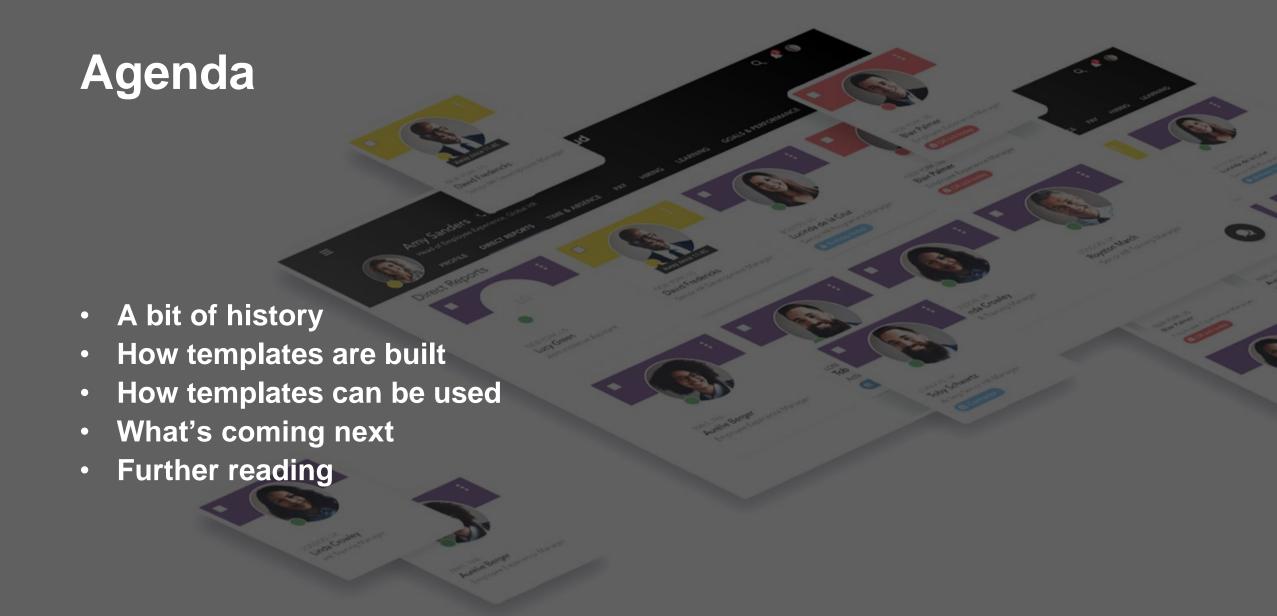- **What's coming next**
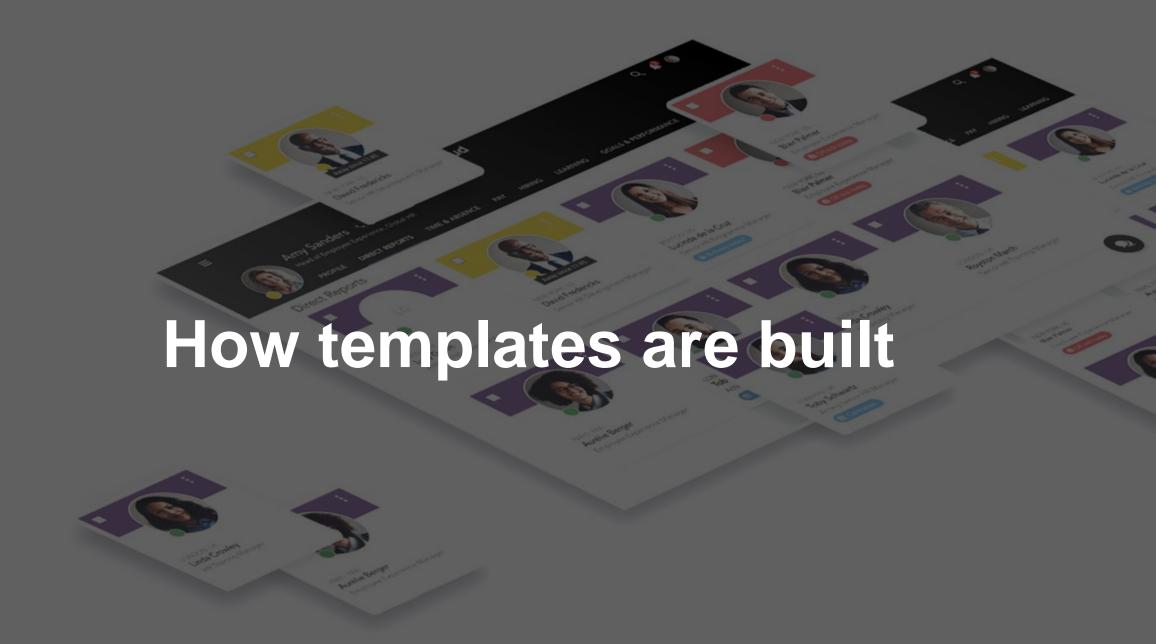- **Further reading**

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A bit of history

Why we needed templates

Even no-code platforms like Applaud require varying levels of consultancy and dev ops effort
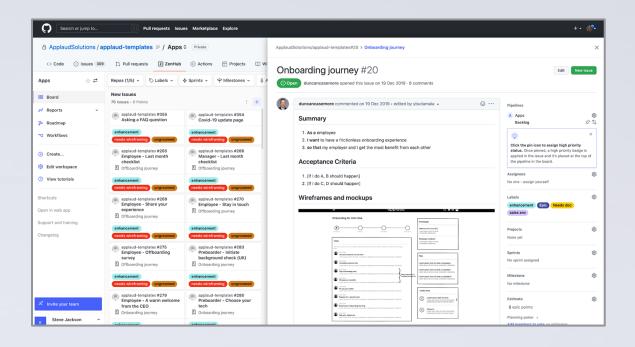
Pages, models and workflows at times need to be configured in their entirety for each new tenant.

This means projects can take longer, requiring significant planning and manpower.

Whilst faster than most other vendors, we wanted to go much faster. Plus, importantly, we wanted partners and customers to deliver their own projects on their own.

How templates are built

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Process - Product acting as a pseudo-dev team

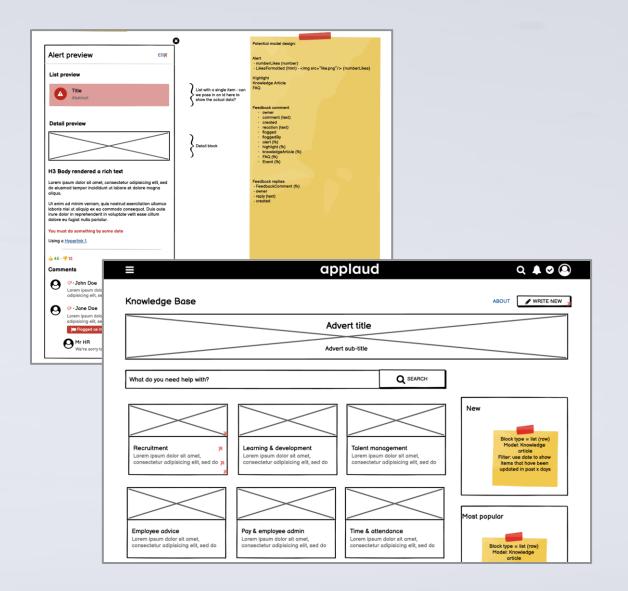## 400+ Stories
Growing every day!

Templates are an important part of our roadmap, so we've introduced processes to try to build momentum and give structure

Currently, all template build is taken care of by the product team - everything from design, wireframing and all story grooming is handled by one team

We have a ZenHub kanban board that works in just the same way as our other engineering teams - with all the usual agile methodology such as stories, epics and sprints

We have daily standup calls to discuss progress, blockers and priorities

Design phase

Deploy faster with best-practice, fully customizable templates covering all things digital HR.
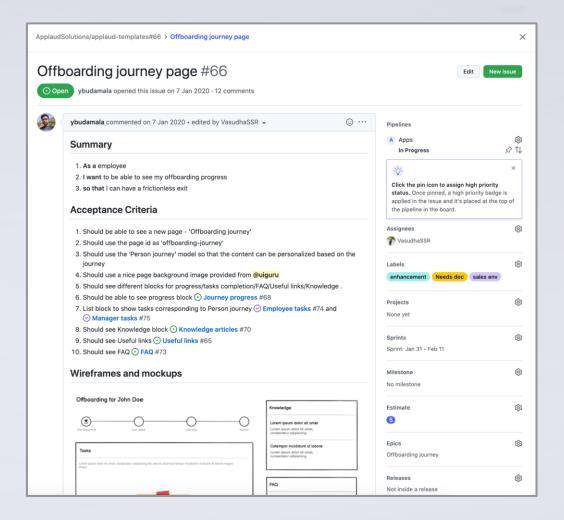
Templates are a key part of delivering against our strategic objective of Faster Time-Value

All templates start out as an idea or business requirement.

We use our tried and trusted design thinking methodology to ascertain what problems are we looking to solve and work towards solutions that will help customers deploy best-practice functionality in a fraction of the time.

We use wireframes to communicate our ideas before writing agile stories to turn these designs into template functionality.

Build phase

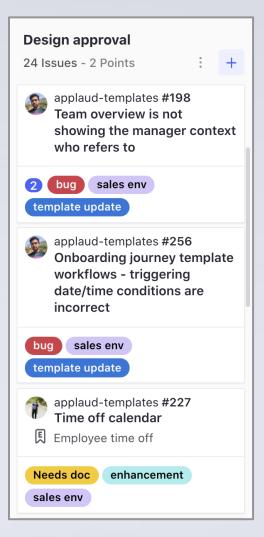**Stories are prioritised based on the needs of the roadmap & business priorities.**

Each member of the product team is assigned stories to design and build end-to-end.

Functionality is configured on a special tenant: **https://dev-templates-applaudhr-com.tryapplaud.com/**

The whole team gives feedback throughout the process and once we're happy that the build matches the requirement - it's time to test!

Test & Publish

Design approval

24 Issues - 2 Points

applaud-templates #198
Team overview is not showing the manager context who refers to

2 | bug | sales env
template update

applaud-templates #256
Onboarding journey template workflows - triggering date/time conditions are incorrect

bug | sales env
template update

applaud-templates #227
Time off calendar
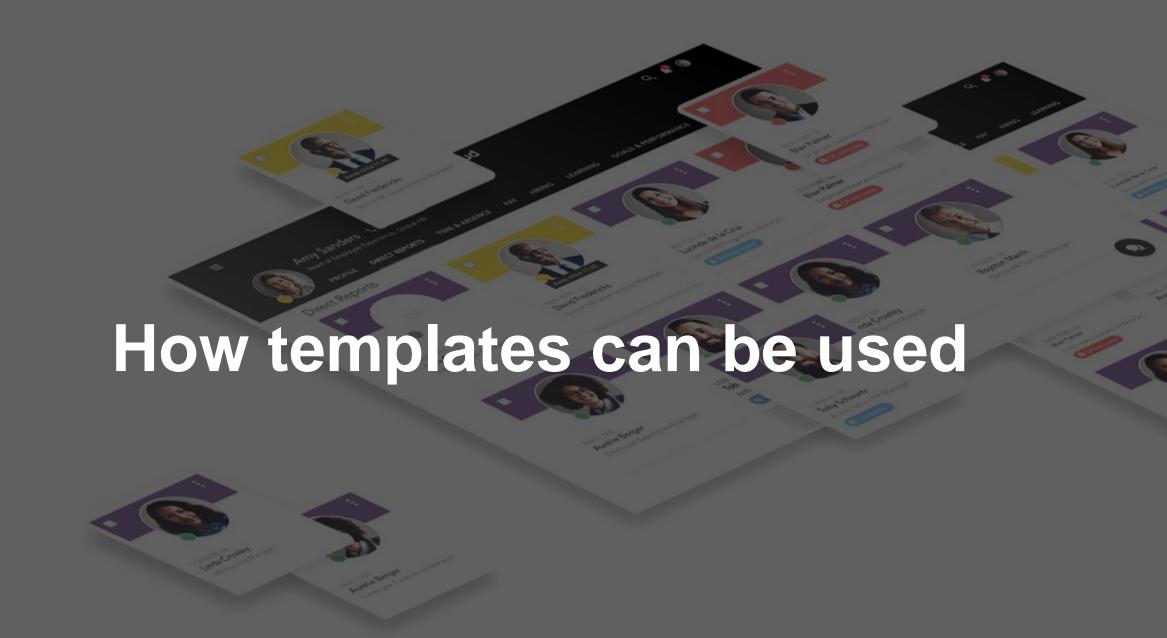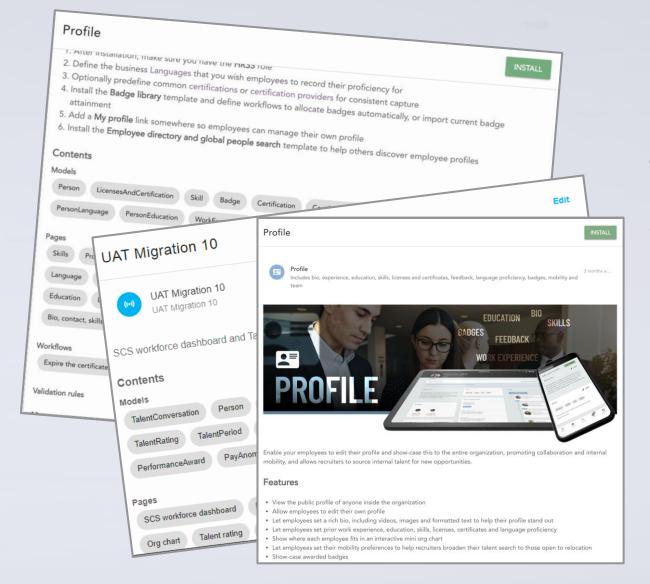Employee time off

Needs doc | enhancement
sales env

When a story is ready to be evaluated, it moves to the design approval swimlane.

Duncan will test the feature (or bug) against the acceptance criteria in the story - in just the same way that the product team do on the other engineering boards

If all is well - it's time to publish!
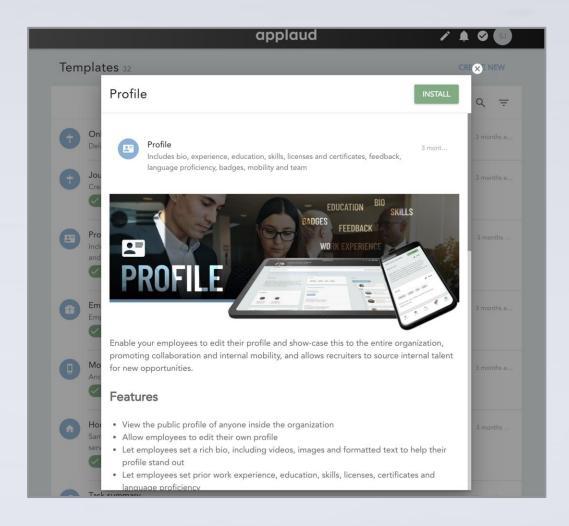
How templates can be used

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Demo of packing up a template

From a single model or page, a distinct bundle of functionality - through to an entire implementation - templates has you covered!

1. You choose what you'd like to re-use

2. All dependencies are gathered up automatically

3. Use images and text to explain the functionality in a "App store" kind of way
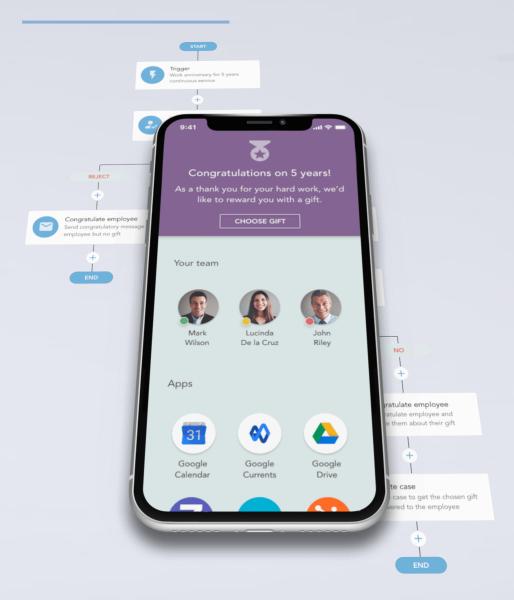
Installing a template

One-touch install and fully customizable

Procedure

1. On the Admin home page (/dashboard) , select **Templates** and select the template you want to install.
2. Review the details in the template to make sure it's the one you want.
3. Select **INSTALL***

*or UPDATE if installing an update to an existing template

Extend & customise

Templates are your starting point

Once a template is installed, it may be exactly what you want at the outset or you can extend and customize without limitation.

- Change the visual appearance or layout
- Add, remove and re-label fields
- Add new content and functionality
- Build new workflows and automation

Template a complete system

dev — **prod**

Configure on dev

Build out your configuration on a development tenant

Package up the entire tenant as one huge template (or break down into smaller templates if appropriate)

Enjoy on prod

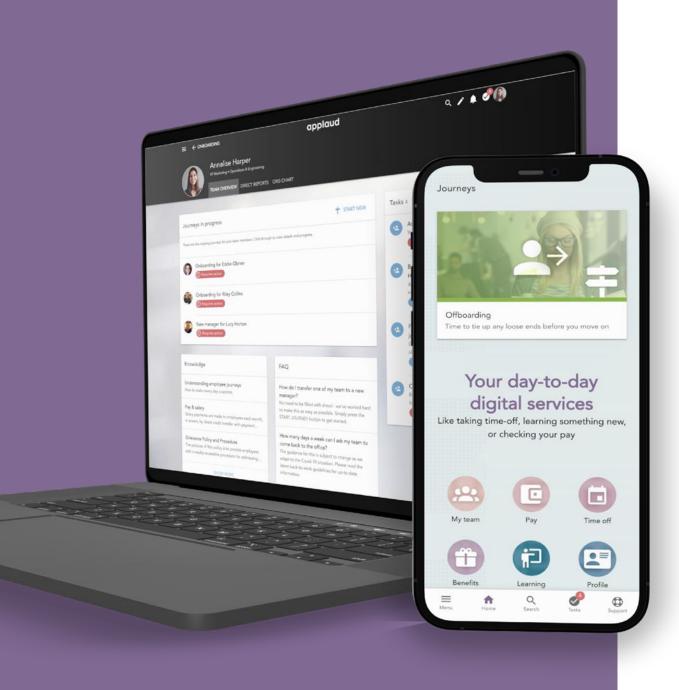Press the install button and watch the magic happen

All the config from the dev tenant gets installed on the production tenant

One of the most powerful things about templates is that you can effectively package an ENTIRE system as a single template

You can then hit the install button on a new tenant and the template will bring in everything from the source tenant

Pages, models, workflows - the lot!

The time savings are measured in DAYS

What's coming next

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Offboarding template

An excellent offboarding process leaves the door open for reconnection, increases brand loyalty and boosts employer reputation.

- Bring all offboarding tasks, content and analytics into one place

- Digitalize manual offboarding processes and automate workflow across departments, apps and data

- Personalize the experience by persona, location, and more.

Themes

- Faster time-to-value
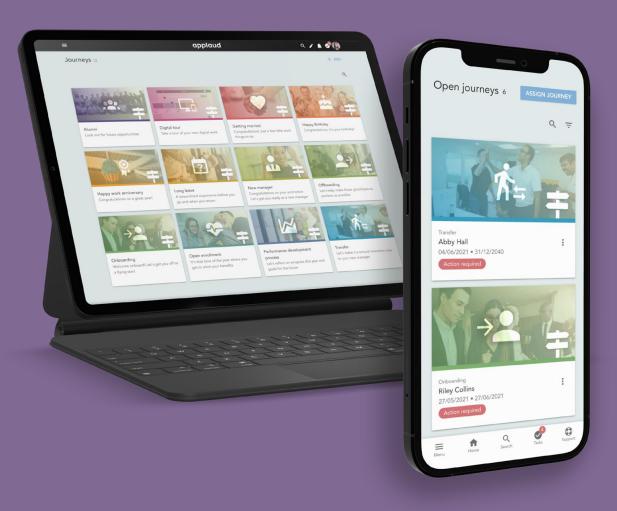- No-code
- Workforce-first

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'New manager' template

Allow new managers to flourish with a personalized program that offers regular communication, effective training and faster onboarding

- Help new managers get up-to-speed faster with a central hub that assists with their 30-60-90 day plan

- Personalize knowledge and content by country or persona.

- Set mentors and help refresh goals and learning

Themes

- Faster time-to-value
- No-code
- Workforce-first

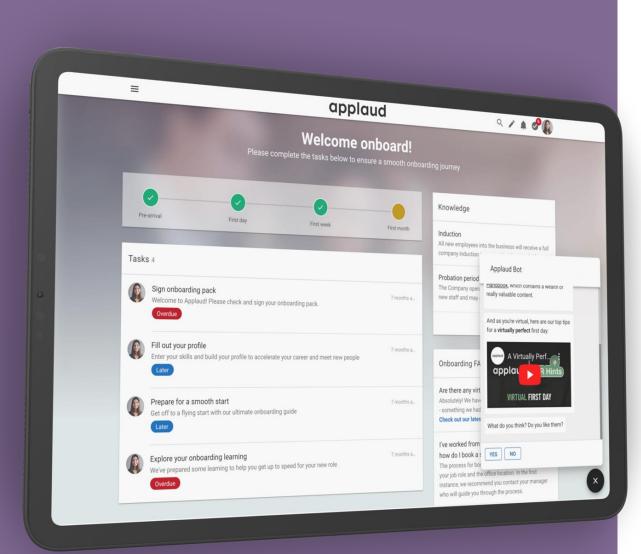applaud

Transfer template

A poor, disjointed transfer process quickly turns an exciting promotion into a frustrating, time-wasting experience. Don't let that happen.

- Support a seamless internal transfer, with all tasks, content and knowledge in one place

- Provide pre-transfer, on-the-day and post-transfer tasks for different people

- Personalize the experience by region or persona

Themes

- Faster time-to-value
- No-code
- Workforce-first

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Onboarding template

An excellent onboarding experience will improve employee experience, reduce first-year attrition, and free HR for more value-added work.
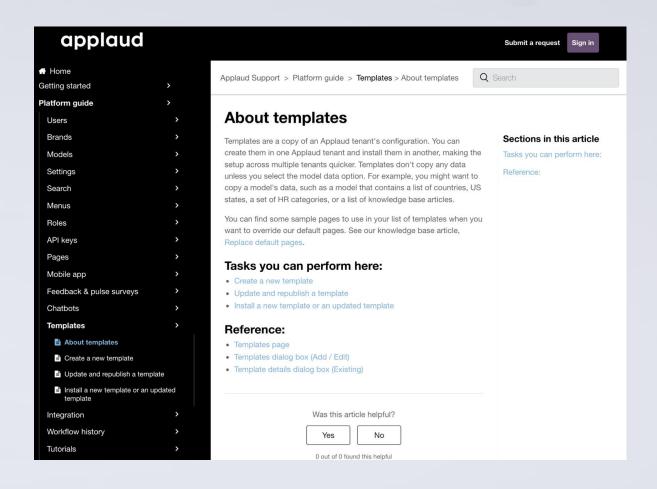
- New preboarder capability helps future joiners get a faster start by completing tasks and receiving nudges ahead of their start

- Create a seamless transition from preboarding to onboarding with a consistent digital experience throughout

- Allow mangers to nominate buddies and help employees connect more easily

Themes

- Faster time-to-value
- No-code
- Workforce-first

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Further information

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Further information

Read the documentation :-)

Our support site has articles explaining more about the detail of using templates.

Book time with product team

For a deeper dive, contact Duncan to arrange a session with a member of the team

https://support.applaudsolutions.com/hc/en-us/articles/4403975260049-About-templates

Thank you!

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