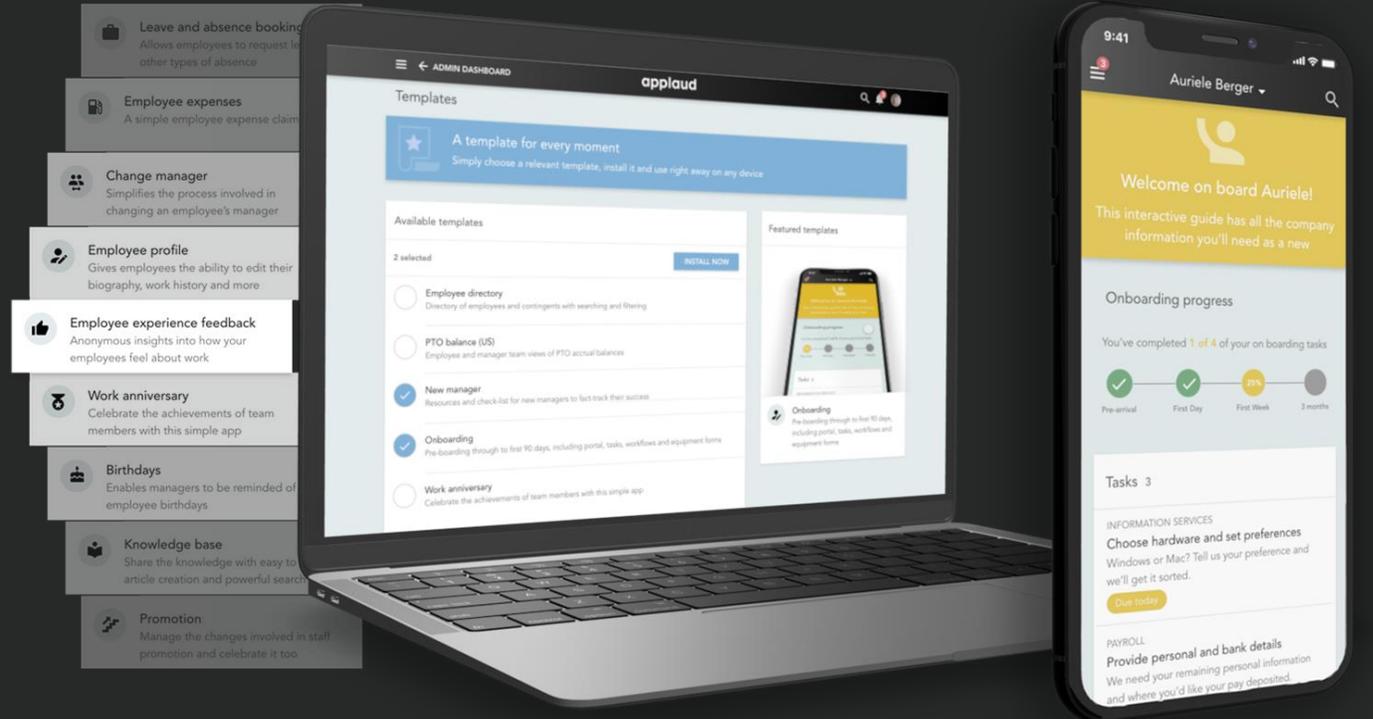


applaud

Templates



Agenda

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

The image features a collection of overlapping mobile application screens, each displaying a different employee profile. The profiles include a circular headshot, the employee's name, and their job title. For example, one screen shows 'Amy Sanders, Head of Employee Experience, Global HR'. Other screens show 'David Fredericks, Senior HR Development Manager', 'Lizbeth de la Cruz, Senior HR Development Manager', 'Linda Crowley, HR Training Manager', and 'Julia Berger, HR Group Supervisory Manager'. The screens are arranged in a perspective view, creating a sense of depth and history. The background is a dark, muted grey.

A bit of history



Why we needed templates

Even no-code platforms like Applaud require varying levels of consultancy and dev ops effort

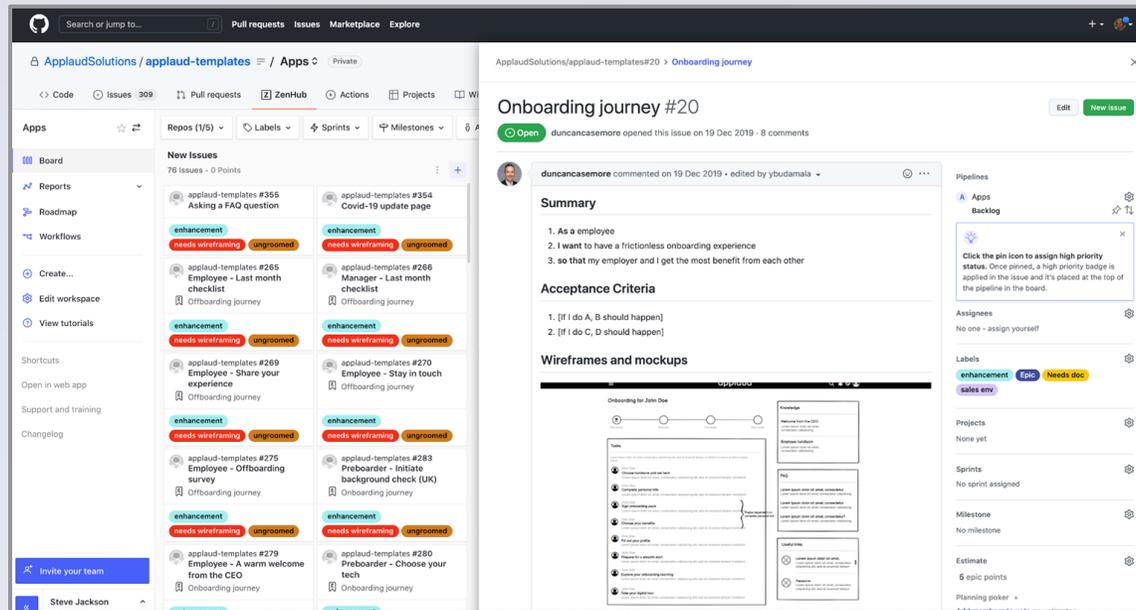
Pages, models and workflows at times need to be configured in their entirety for each new tenant.

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

Process - Product acting as a pseudo-dev team



400+ Stories
Growing every day!

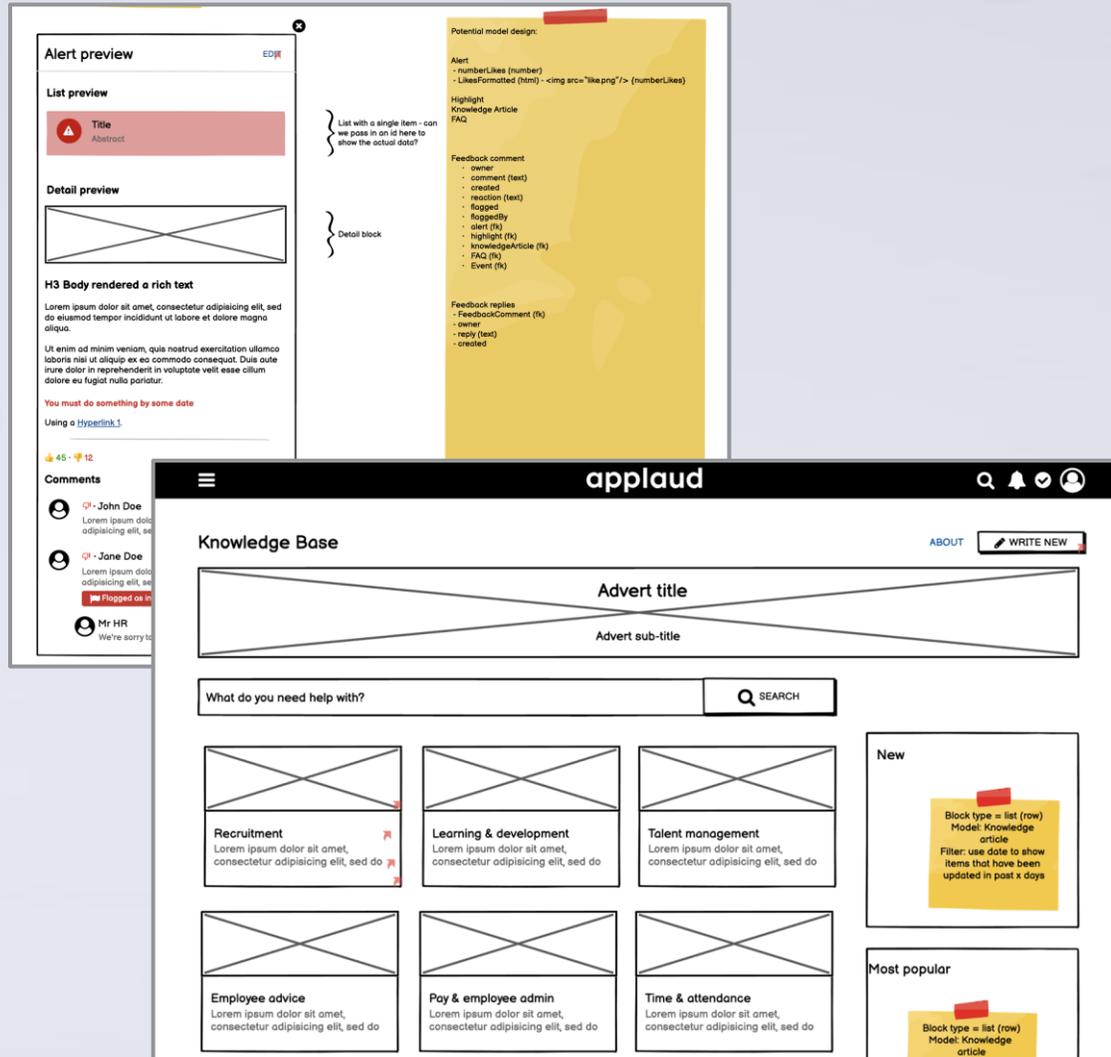
Templates are an important part of our roadmap, so we've introduced processes to try to build momentum and give structure

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

ApplaudSolutions/applaud-templates#66 > [Offboarding journey page](#)

Offboarding journey page #66

Open ybudamala opened this issue on 7 Jan 2020 · 12 comments

ybudamala commented on 7 Jan 2020 · edited by VasudhaSSR

Summary

1. As a employee
2. I want to be able to see my offboarding progress
3. so that I can have a frictionless exit

Acceptance Criteria

1. Should be able to see a new page - 'Offboarding journey'
2. Should use the page id as 'offboarding-journey'
3. Should use the 'Person journey' model so that the content can be personalized based on the journey
4. Should use a nice page background image provided from @uiguru
5. Should see different blocks for progress/tasks completion/FAQ/Useful links/Knowledge .
6. Should be able to see progress block [Journey progress #68](#)
7. List block to show tasks corresponding to Person journey [Employee tasks #74](#) and [Manager tasks #75](#)
8. Should see Knowledge block [Knowledge articles #70](#)
9. Should see Useful links [Useful links #65](#)
10. Should see FAQ [FAQ #73](#)

Wireframes and mockups

Offboarding for John Doe

Pre-Departure → Last week → Last day → Action

Tasks

Placeholder for task list

Knowledge

Placeholder for knowledge articles

FAQ

Placeholder for FAQ items

Pipelines

Apps In Progress

Click the pin icon to assign high priority status. Once pinned, a high priority badge is applied in the issue and it's placed at the top of the pipeline in the board.

Assignees

VasudhaSSR

Labels

enhancement Needs doc sales env

Projects

None yet

Sprints

Sprint: Jan 31 - Feb 11

Milestone

No milestone

Estimate

5

Epics

Offboarding journey

Releases

Not inside a release

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

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

2 bug sales env
template update

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

bug sales env
template update

aplaud-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

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

Profile INSTALL

1. After installation, make sure you have the **HRSS** role
2. Define the business Languages that you wish employees to record their proficiency for
3. Optionally predefine common certifications or certification providers for consistent capture
4. Install the **Badge library** template and define workflows to allocate badges automatically, or import current badge attainment
5. Add a **My profile** link somewhere so employees can manage their own profile
6. Install the **Employee directory** and **global people search** template to help others discover employee profiles

Contents

Models

- Person
- LicensesAndCertification
- Skill
- Badge
- Certification
- PersonLanguage
- PersonEducation
- WorkE

Pages

- Skills
- Pro
- Language
- Education
- Bio, contact, skills

Workflows

- Expire the certificate

Validation rules

UAT Migration 10

Contents

Models

- TalentConversation
- Person
- TalentRating
- TalentPeriod
- PerformanceAward
- PayAnnot

Pages

- SCS workforce dashboard
- Org chart
- Talent rating

Profile INSTALL

Profile
Includes bio, experience, education, skills, licenses and certificates, feedback, language proficiency, badges, mobility and team

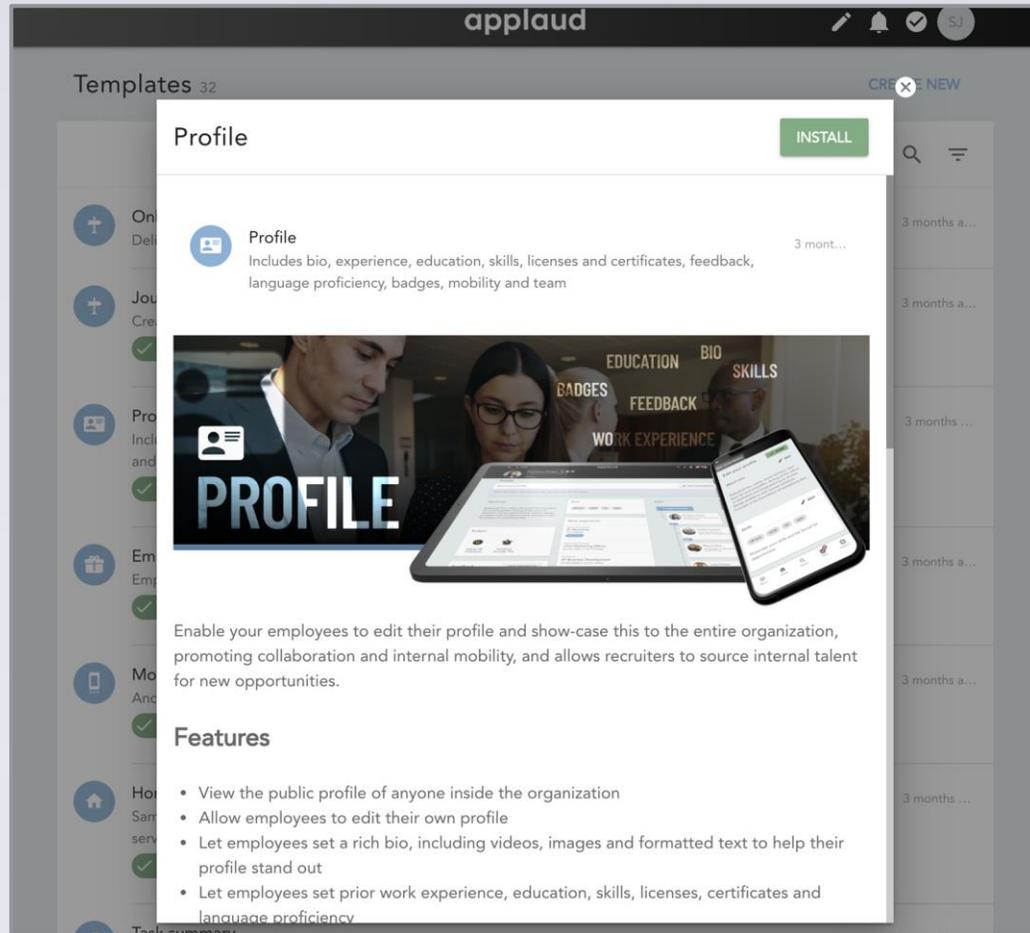
PROFILE

Enable your employees to edit their profile and show-case this to the entire organization, promoting collaboration and internal mobility, and allows recruiters to source internal talent for new opportunities.

Features

- View the public profile of anyone inside the organization
- Allow employees to edit their own profile
- Let employees set a rich bio, including videos, images and formatted text to help their profile stand out
- Let employees set prior work experience, education, skills, licenses, certificates and language proficiency
- Show where each employee fits in an interactive mini org chart
- Let employees set their mobility preferences to help recruiters broaden their talent search to those open to relocation
- Show-case awarded badges

Installing a template



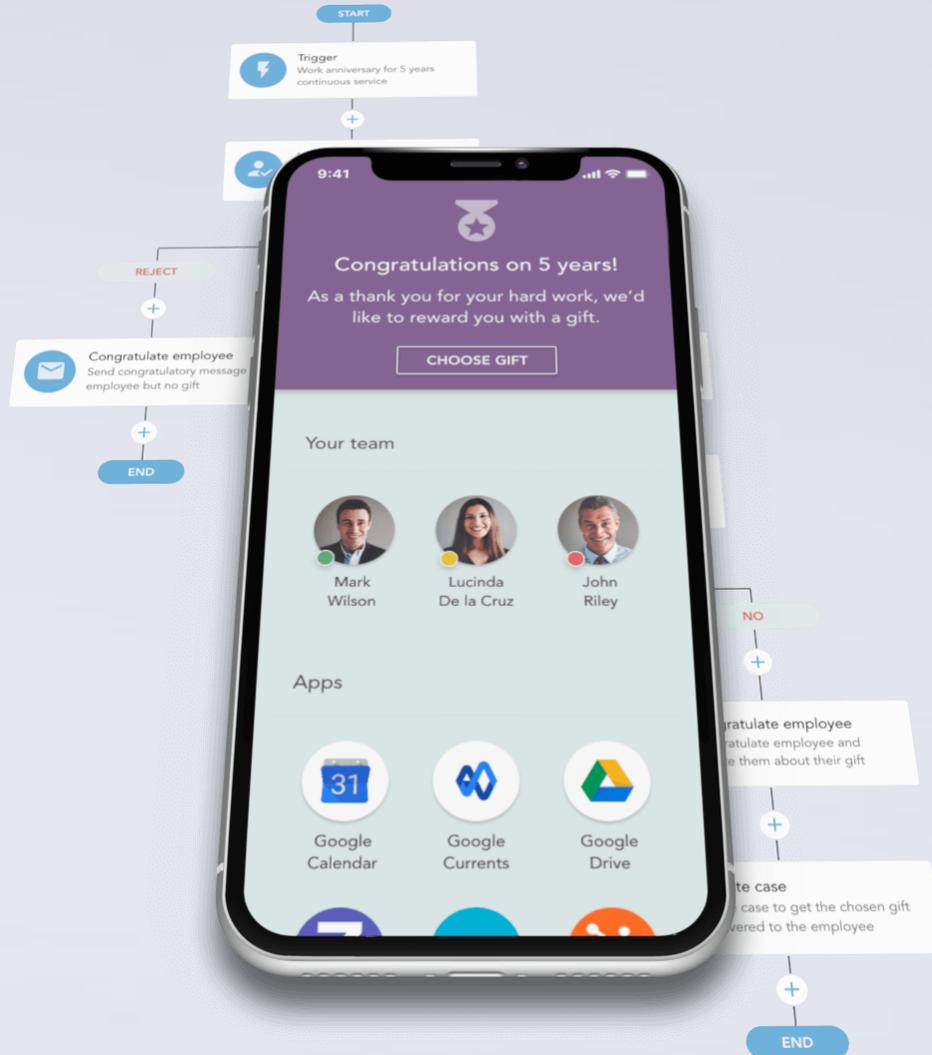
One-touch install and fully customizable

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



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

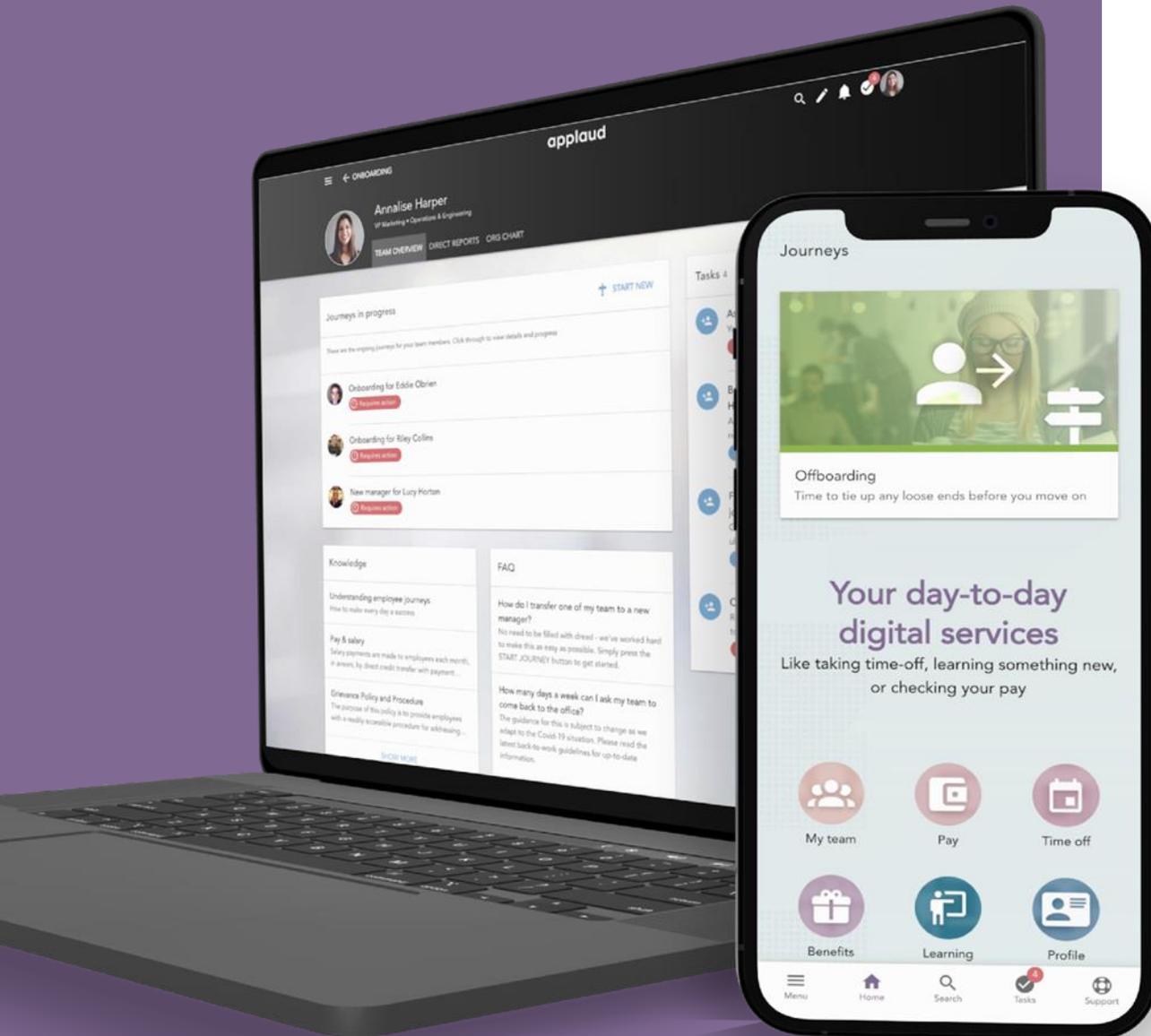
Offboarding template

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



‘New manager’ template

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

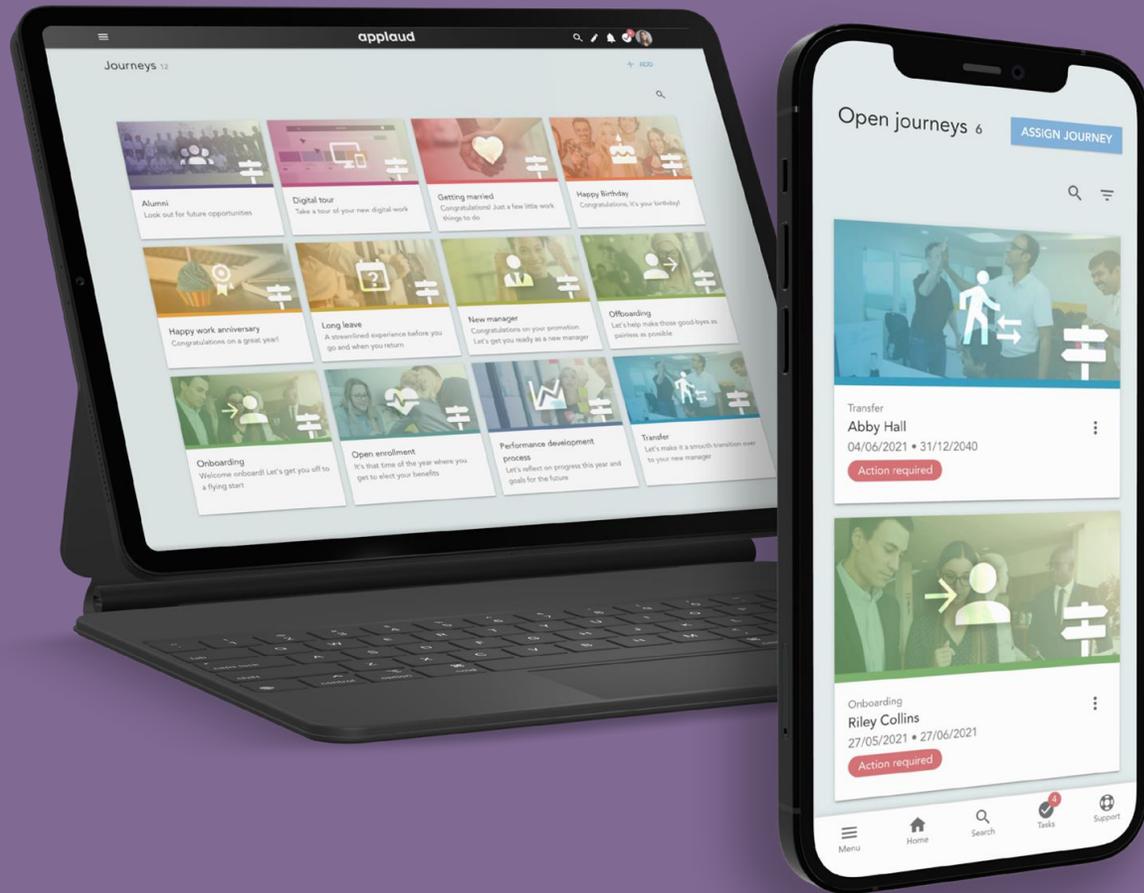
- Help new managers get up-to-speed faster with a central hub that assists with their 30-60-90 day plan
- Personalize knowledge and content by country or persona.
- Set mentors and help refresh goals and learning

Themes

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

Transfer template

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



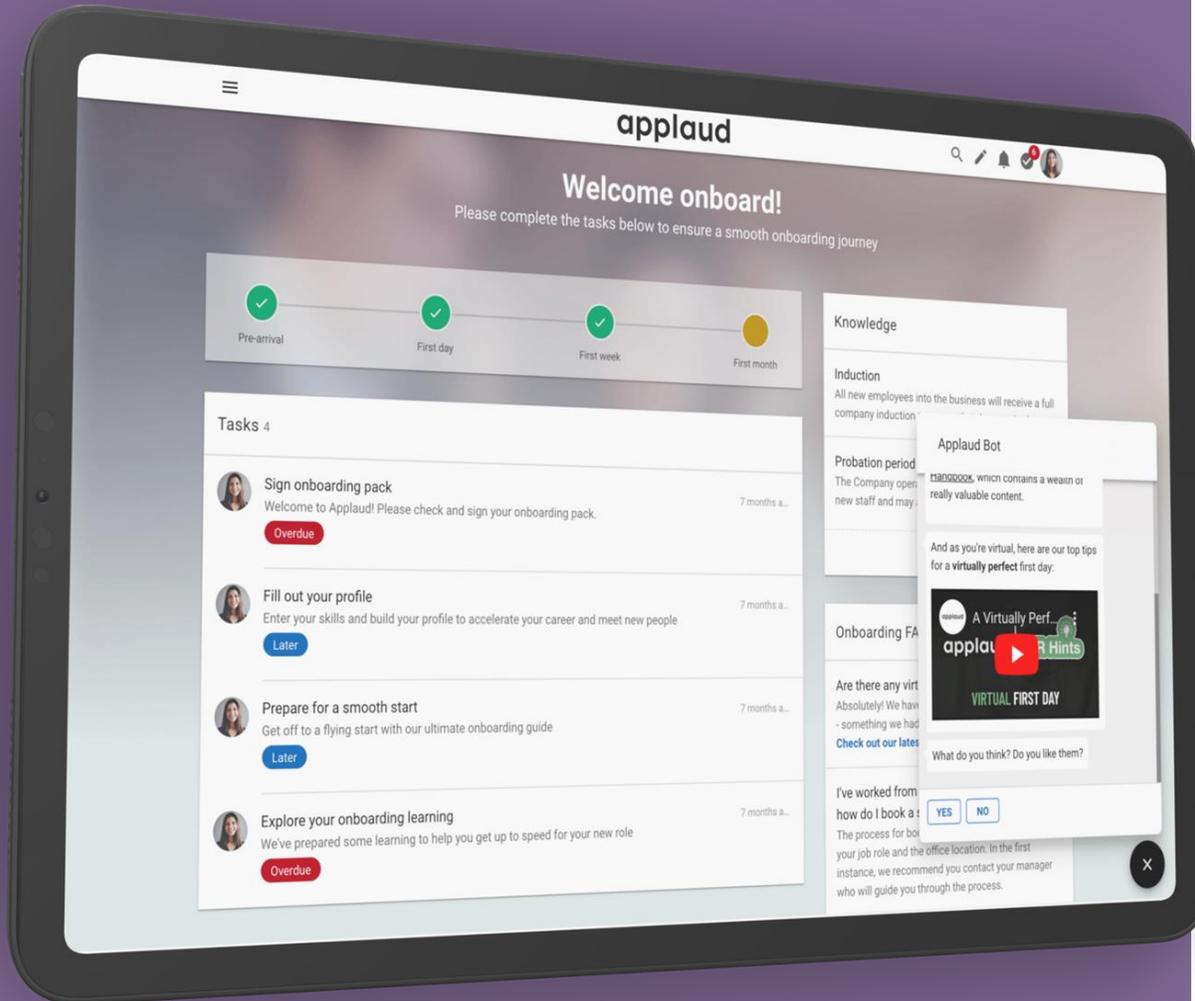
- Support a seamless internal transfer, with all tasks, content and knowledge in one place
- Provide pre-transfer, on-the-day and post-transfer tasks for different people
- Personalize the experience by region or persona

Themes

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

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 managers to nominate buddies and help employees connect more easily

Themes

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

The image displays several overlapping mobile application screens, likely for a human resources or management system. The screens are arranged in a perspective view, creating a sense of depth. Each screen shows a different interface element, such as an employee profile card, a management dashboard, or a list of reports. The profiles include names like Amy Sanders, David Fredericks, Lisa Palmer, Lizbeth Cruz, and others, along with their titles and roles. The dashboards feature various charts, graphs, and data points, indicating a comprehensive management tool. The overall aesthetic is clean and professional, with a color palette of purples, blues, and greys.

Further information

Further information

The screenshot shows the Applaud support site interface. At the top left is the 'applaud' logo. In the top right, there are links for 'Submit a request' and 'Sign in'. A navigation menu on the left lists various categories like 'Home', 'Getting started', 'Platform guide', 'Users', 'Brands', 'Models', 'Settings', 'Search', 'Menus', 'Roles', 'API keys', 'Pages', 'Mobile app', 'Feedback & pulse surveys', 'Chatbots', 'Templates', 'Integration', 'Workflow history', and 'Tutorials'. The main content area is titled 'About templates' and includes a breadcrumb trail: 'Applaud Support > Platform guide > Templates > About templates'. The article text explains that templates are copies of an Applaud tenant's configuration and provides instructions on how to create and use them. It also lists tasks that can be performed, such as creating, updating, and installing templates. A 'Reference' section lists related articles. At the bottom, there is a feedback form asking 'Was this article helpful?' with 'Yes' and 'No' buttons, and a note that '0 out of 0 found this helpful'.

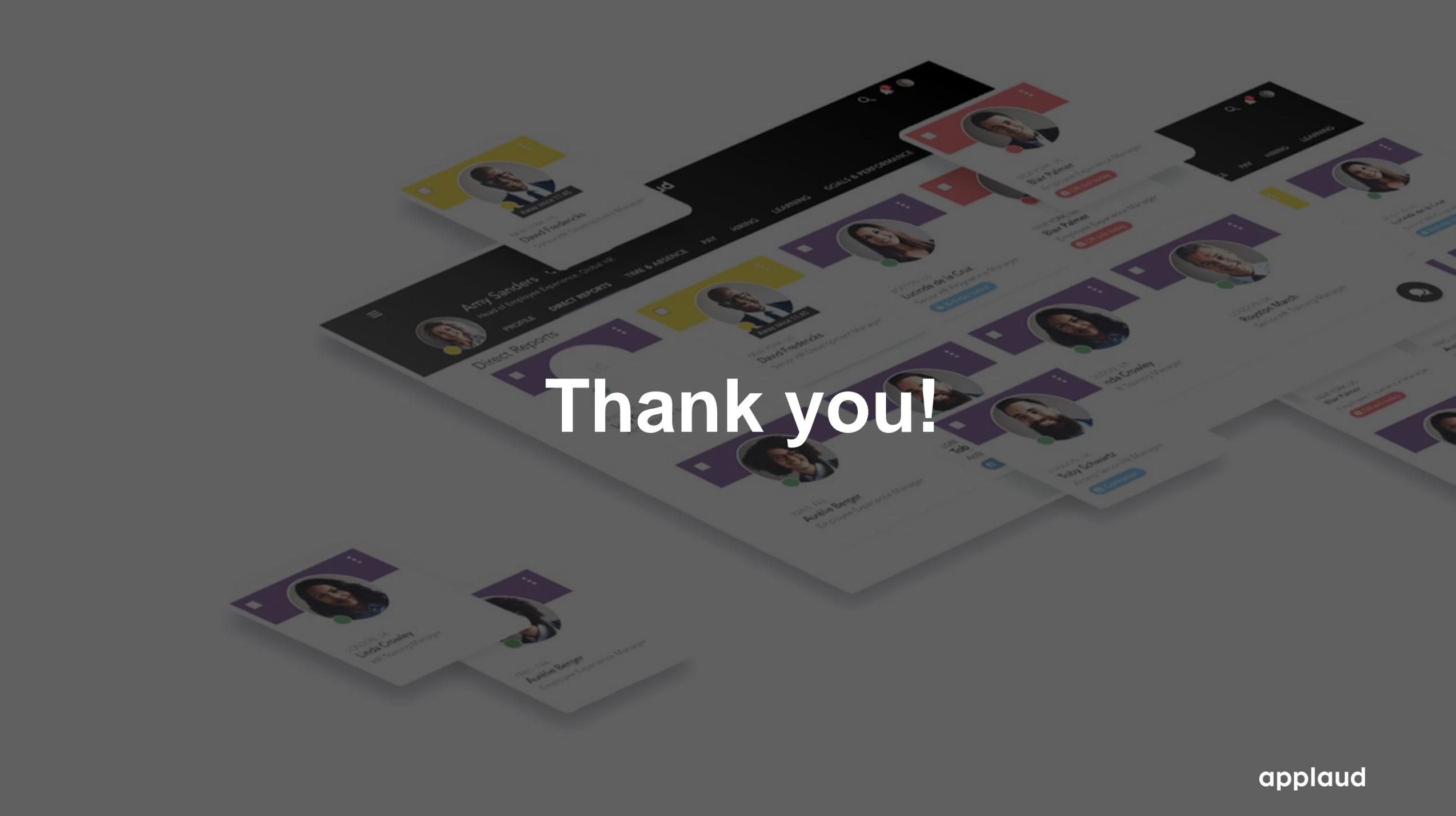
Read the documentation :-)

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!