



SimplyMerit Sample Implementation Plan



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Schedule Initial SimplyMerit HR Administrator Training Session

During Initial 90-minute Training Session

- Review SimplyMerit's resources for HR Admins and Managers
 - Resources located at: <https://www.simplymerit.com/faq/>
 - Import File Data Dictionaries
 - Getting Started Guides for HR Admins and Managers
 - "Need Help?" Feature within SimplyMerit
- Schedule 3-5 meetings with the SimplyMerit Support Team
- Accept calendar invitations from the SimplyMerit Support Team

Establish Themes and Goals for Each Meeting with Defined Action Items

- Verify where the basic employee data is located
 - Target date to import by:
 - Location of Data:
- Will performance ratings be used?
 - Target date to import by:
 - Location of performance ratings:
- Using SimplyMerit for a Merit cycle?
 - Target date to import by:
 - Location of merit data:
- Using SimplyMerit for a Bonus Cycle?
 - Target date to import by:
 - Location of bonus data:
- Using SimplyMerit for an Equity Cycle?
 - Target date to import by:
 - Location of equity data:
- Will employee salary history be imported into SimplyMerit?
 - Target date to import by:
 - Location of historical salary data:
- Will we use SimplyMerit to generate and distribute Adjustment Letters?
 - Target date to distribute letters:

Discuss Rollout Strategies

- Individually Send Invitations to Managers
- Send Bulk Invitations to Managers
- Phased Deployments
 - Invite 1st Level Managers

- Invite 2nd Level Mangers

Plan for Training Managers

- Live training sessions with the SimplyMerit Support Team?
 - Contact the SimplyMerit Support Team to coordinate training sessions
 - Work with SimplyMerit Support to determine training plan
- Internally distribute training materials to managers?
- Leverage SimplyMerit's built-in "Need Help?" function?

1. Meeting – Load Basic Employee Information

Meeting Prerequisites

- Have basic employee data from HRIS or payroll system ready to be moved to SimplyMerit's data import template

Meeting Focus

- Import the basic employee data
- Determine if SimplyMerit's "Delegates" feature be used
- Discuss how the organization's merit budget is created and allocated to managers
 - Currencies
 - Set exchange rates at Configuration | Currencies tab after importing the appropriate currency codes
 - Set the organization's "Overall Merit Budget %"
 - Configuration | Budget Amounts
 - Configure "Exceptions"
 - Configuration | Exceptions
 - Proration Settings for Merit and Bonus
 - Configuration | Timeline
- Differentiate between:
 - Process for Initial Data Import
 - Getting basic employee data into SimplyMerit
 - Process for Subsequent Data Imports
 - Making bulk updates to employee records
- If using Namely, ADP, or Criterion
 - Discuss when to use the "Universal Importer" for subsequent data imports
- Discuss common errors experienced when importing data
- Explore Configuration | Export tab
- Review how to terminate/remove employees
- Discuss the process for updating an employee's manager
 - Note: a manager's direct reports need to be moved to different teams before a manager can be removed from SimplyMerit

End of Meeting Goals

- Have basic employee data loaded into the client's production environment
- Briefly discuss goals for the following meeting

Action Items for Client

- Client should organize data prior to the next meeting in order to be prepared to import bonus programs, equity programs, or salary history

2. Meeting – Import Incentive Programs

Meeting Prerequisites

- Have incentive data ready to be moved to SimplyMerit’s incentive template
- Verify client is comfortable with the processes associated with importing and updating basic employee data
- Verify there are no outstanding action items from the previous meeting

Meeting Focus

- Discuss the organization’s bonus program structure and requirements
- Make sure all employees have their bonus programs successfully configured on the data template
 - Discuss the four bonus types: nominal, percentage, subjective, discretionary
- Utilize the Discretionary Bonus button?
- Does a certain segment of employees need advanced proration (mid-cycle promotions or new hires)
- Learn how to update bonus programs
- Learn how to delete bonus programs

End of Meeting Goals

- Successfully import the bonus programs into SimplyMerit
- Is the client comfortable with the process of importing, updating, and deleting incentives?
- Briefly discuss goals for the following meeting

Action Items for Client

- Client should organize data prior to the next meeting in order to be prepared to import bonus programs, equity programs, or salary history

3. Meeting – Import Equity Programs

Meeting Prerequisites

- Have equity data ready to be moved to SimplyMerit’s data import template
- Verify client is comfortable with the processes associated with importing, updating, or removing bonus programs
- Verify there are no outstanding action items from the previous meeting

Meeting Focus

- Discuss the organization’s equity programs and get the data into a template to import the Equity programs
- Introduce the “Equity Grant Types” tab to track units and assign values for the grants

End of Meeting Goals

- Customize the Equity tab on Configuration | Active Features
- Have the equity programs successfully imported into SimplyMerit
- Manage components of the Grants via Configuration | Equity Grant Types tab
- Are you loading salary, incentive, and/or equity history into SimplyMerit?
- After grants have been successfully added, is SimplyMerit ready to be used?

Action Items for Client

- Provide Salary, Bonus, and Equity histories to SimplyMerit Support Team (if loading historical data)
- Determine if SimplyMerit needs to be further customized via Configuration | Active Features | Display Fields
 - Consider having the HR Admin show the tool to leadership to see if anything else needs to be changed prior to deploying SimplyMerit

4. Meeting – Import Salary History and Finalize Environment

Meeting Prerequisites

- Verify client is comfortable with loading basic employee information, incentives, and/or equity programs
- Verify there are no outstanding action items from the previous meeting

Meeting Focus

- Verify the exchange rates are configured correctly if using multiple currencies
 - Configuration | Currencies
- Discuss method for inviting managers into SimplyMerit
- Discuss how invitations are sent and what to do if managers cannot find their invitations to access SimplyMerit
- All of the managers' requests need to have "Approved" statuses in order for them to be able to download their teams' adjustment letters
- Learn how an HR Admin can modify, reverse, or reject requests that have "Approved" statuses
- Update employee information within SimplyMerit by navigating to Configuration | Employee Information tab

End of Meeting Goals

- Is the client satisfied with the configuration settings in the production environment?

Action Items for Clients

- Discuss any additional questions or concerns with SimplyMerit's Support Team
- Determine if SimplyMerit will be used to create and distribute the organization's adjustment letters
 - If so, schedule an additional meeting with the SimplyMerit Support Team
 - Share previous adjustment letters with the SimplyMerit Support Team to have examples created

5. Meeting – Adjustment letters

Meeting Prerequisites

- Share examples of the organization’s previous adjustment letters with the SimplyMerit Support team
- Decide to use separate or combined adjustment letters
- Identify all of the conditions that are needed for the different adjustment letters to be accurately generated

Meeting Focus

- Review example letters for each condition that have been previously defined
- Every team request needs to be in an “Approved” state before a manager can download their team’s adjustment letters within SimplyMerit
- Load the adjustment letter template into the client’s production environment
- Navigate to Configuration | Export to generate a Zip File that contains all of the organization’s adjustment letters
- Discuss strategies for distributing the adjustment letters
 - Send letters to managers within SimplyMerit
 - Internally distribute the letters to the managers without utilizing SimplyMerit

Action Items for Clients

- Contact Support@SimplyMerit.com if any additional questions or concerns emerge