



WELCOME TO THE

Phamily



Thinking of joining the Phenom Phamily? We've created this **Silver Onboarding Program Jumpstart Guide** to give you an inside look at our best-in-class onboarding process.

What to Expect



Your Project Team

- Project Team Responsibilities
- Project Team Allocation



Project Meetings and Workshops

- Project Kickoff Meeting
- Phenomenal Workshops
- UAT Kickoff Meeting
- Go-Live Readiness



Jumpstart Resources

- TA Business Team Resources
- Content Team Resources
- Technical Team Resources
- Integrations Team Resources



Phenom Training Academy

- Phenomenally Phast Onboarding
- Product Trainings
- Certifications

Welcome, Phenom!

We are so excited to welcome you to the Phenom community, where we call our customers “Phenoms,” and are eager to share the knowledge we have acquired over the years as we help you and your organization benefit from our world-class Talent Experience Management (TXM) solution. We look forward to leading you through this journey as you interact with the Client Services, Support, and Success teams to both meet your immediate needs and develop a long-term partnership.

As with any journey, even if you don’t have the final destination solidified, you should think about what milestones you want to hit along the way. The Phenom TXM platform has achieved amazing results for our Phenoms, so consider what long-term success means to you:

- Increase application conversion rates by two-thirds
- Reduce time to hire by 50 percent
- Increase site traffic by more than 10x

Your journey will begin with the Client Services team, where we believe onboarding should be phenomenal. Our Customer Onboarding and Readiness Experience (“CORE”) program is a Phenom-exclusive world-class onboarding experience. Rooted in years of best practice development to understand your organization’s needs and business goals, we guide you through onboarding, configuration, launch, user adoption, and strategic iterations. Phenom leverages our CORE framework to apply the context of your organization to ensure that your organization’s needs are addressed when the platform goes live, creating not just a customized experience, but a personalized one. We believe this process should be seamless and standardized, with room to adapt how we deliver to your needs. Together we champion your onboarding and readiness experience, and build a foundation for long term success.

This Jumpstart Guide will help you take the first steps towards Go-Live, guiding you through some early milestones that will ensure you are well situated to meet your project goals.

There has never been a more exciting time to become a part of the Phenom community - our product is innovating at a trajectory beyond any competition, and our company is leading the world in Talent Experience Management as we fulfill our mission of helping one billion find the right job. We look forward to partnering with you!

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Project success starts with knowing the key players. Who will you need, when, and for how long? To help you identify the right people for your team, we’ve outlined the roles and responsibilities of those needed to support your project, and included a sample resource allocation guide to help your team plan ahead with scheduling and availability. Understanding that each project plan schedule may vary, your Engagement Manager will review your allocation needs and confirm your specific timeline when your project kicks off.





















As you build your team, keep in mind that a single person may hold multiple roles. For example, the project manager may also be the HRIS Administrator. Perhaps you don’t have a Digital Marketing Lead, but rather that role will be filled by a TA Leader. If this sounds like your team, keep in mind that the time commitment for these individuals will be inclusive of the time needed for each role they’re filling.




Your Project Team Roles and Responsibilities

Role	Description	Day to Day	Time Commitment
Executive Leadership	Provides guidance to client project team on project goals and objectives. Has fiscal responsibility for the project.	<ul style="list-style-type: none"> • Assigns qualified staff to the project team. • Decision maker for escalated issues. • Participates in steering committee meetings, as needed. 	1-2 hours per month
Project Manager	Single point of contact for Phenom project team that maintains governance over	<ul style="list-style-type: none"> • Ensure internal stakeholders meet project goals and objectives. • Adhere to project timeline and scope as 	6-12 hours per week for the project duration

	project internally, including requirements, scope, deliverables, and timeline.	<p>agreed upon with Phenom.</p> <ul style="list-style-type: none"> • Ensure on-time delivery of all project requirements from all team members. 	
HRIS Administrator	Responsible for day-to-day maintenance, data governance, and long-term system success.	<ul style="list-style-type: none"> • Administer and configure the ATS during the project, including testing integrations and supporting issue resolution. • Primary contact for ATS integration tasks. 	6-12 hours over the project, as noted below
Digital Marketing Lead	Responsible for managing branding guidelines, updating the Phenom Canvas with assets and content for core pages, and creating new content, if needed.	<ul style="list-style-type: none"> • Provide branding and font files. • Curate or create images, videos, and written content for the site. • Add content to site pages. • Create additional site pages for launch. 	6-12 hours per week during site design phase, as noted below
IT Lead	Works with the client Project Manager to prepare the site for redirect at Go-Live.	<ul style="list-style-type: none"> • Primary contact for all non-integration related technical tasks, including subdomain creation, SSL certificates, email white labeling, IP whitelisting, Single Sign-on, and site redirects. • Must be able to effect change to configuration, access, and settings in order to enable each of the above features. This includes changes for your domains, DNS, system access, network and other. 	6-12 hours over the project, as noted below
TA Business Leader	Serves as the voice for the recruitment teams, ensuring platform configurations and integrations address the need and goals of the organization.	<ul style="list-style-type: none"> • Primary contact for all Phenom CRM and Talent Analytics tasks and decisions. • Configure CRM for Go-Live. • Lead internal change management and training efforts. 	6-12 hours over the project, as noted below

Project Team Allocation

	Executive Leadership	Project Manager	HRIS Admin	Digital Marketing Lead	IT Lead	TA Business Leader
Week 1	 Kickoff Workshop	 Kickoff Workshop Weekly check-in	 Kickoff Workshop	 Kickoff Workshop	 Kickoff Workshop	 Kickoff Workshop
Week 2		 Content Workshop Weekly check-in		 Content Workshop		 Content Workshop
Week 3		 Integration Workshop Weekly check-in	 Integration Workshop	 Add Site Content		 Integration Workshop
Week 4		 Technical Workshop Weekly check-in		 Add Site Content	 Technical Workshop	 Technical Workshop
Week 5		 CRM Workshop Weekly check-ins		 Add Site Content		 CRM Workshop

Weeks 6-11		 Weekly check-ins		 Add Site Content		 Champion Training
Week 12		 Weekly check-in		 Stakeholder Content Review & Edits		 Finalize Configurations Champion Training
Week 13		 Testing Kickoff Weekly check-in	 Testing Kickoff	 Testing Kickoff	 Testing Kickoff	 Testing Kickoff
Weeks 14-15		 Testing Weekly check-in	 Testing	 Testing	 Testing	 Testing
Week 16	 Go-Live Prep and Launch	 Go-Live Prep and Launch	 Go-Live Prep and Launch	 Go-Live Prep and Launch	 Go-Live Prep and Launch	 Go-Live Prep and Launch

NOTE: Above timeline is based on an API integration and is subject to change if ATS or integration method differs. Additional scope, as well as data migration, may cause project schedule to increase by several weeks.



Throughout the course of your Phenom onboarding, your team will participate in workshop sessions designed to review and collaborate on project deliverables, assist with the decision making process, and provide resources to help your team complete any follow-up items.

The most successful project meetings and workshops are those in which the right people are at the table ready and equipped to make decisions together. For this reason, it's essential that all attendees complete all meeting prerequisites and assigned training, review the agenda and meeting objectives in advance, and deliver meeting follow-up items by the deadlines agreed upon with Phenom.

Below you will find an overview of the key project meetings and workshops, including the timing and duration, suggested attendees, prerequisites, objectives, discussion topics, and anticipated follow-up actions. Understanding that every project is different, this overview is provided as a best practices guide based on our extensive experience working with customers. Should there be a need to combine meetings or schedule additional sessions, you will work with your Engagement Manager to make the necessary adjustments.

It is highly recommended that your Project Manager familiarize him/herself with the agenda details prior to each meeting to ensure a productive outcome and timely execution of project deliverables.

Project Meetings and Workshops

Project Kickoff Meeting

Date and Duration: Week 1, 60 minutes

Attendees: Executive Leadership, Project Manager, HRIS Administrator, Digital Marketing Lead, IT Lead, TA Business Leader.

Objective: Initiate the project, including the design process, by choosing a site layout configuration from the available Canvas options.

Prerequisites: Signed SOW, customer team reviews Jumpstart Guide and completes Phenomenally Phast Project Kickoff (approx. 2 hours) in the Phenom Explorer Training Academy.

Agenda Topics:

- Review and confirm scope of work and project plan.
- Review Phenom TXM platform features and functionality at a high level.
- Validate Canvas choice as selected in the Phenomenally Phast Project Kickoff course.
- Discuss branding guidelines.
- Discuss integrations and technical configurations required for onboarding.
- Review follow-up actions and preview week 2 agenda and documents.

Expected Customer Follow-up Actions:

- Begin collecting career site assets
- Complete Phenomenally Phast Career Site Configurations course (approx. 2 hours) in the Training Academy.

Workshop 1 - Career Site Content Workshop

Date and Duration: Week 2, 60-90 minutes

Attendees: Project Manager, Digital Marketing Lead, TA Business Leader.

Objective: Review first build of branded career site in a test environment; finalize site configurations.

Prerequisites: Completion of Workshop 1 follow-up actions

Agenda Topics:

- Review provisioned career site with selected Canvas layout and customer-provided branding.
- Finalize career site UI and search configuration requirements.
- Document Talent Community Form requirements.
- Deliver access to CMS and review CMS functionality.
- Deliver Access to Phenom Bot Knowledge Base and review Phenom Bot FAQ functionality

Expected Customer Follow-up Actions:

- Gather career site assets and add content within the CMS.
- Provide Header and Footer details.
- Provide updated copy for auto-responder emails.
- Add Phenom Bot FAQs within the Knowledge Base.
- Optionally, deliver sample CRM data for import.

Workshop 2 - ATS Integration Workshop

Date and Duration: Week 3, 90 minutes

Attendees: Project Manager, HRIS Administrator, TA Business Leader.

Objective: Gather requirements for Job Pull, Apply, and Hiring Status integrations for the integration method(s) outlined in the SOW.

Prerequisites: Review integration documentation provided by your Engagement Manager.

Agenda Topics:

- Collect Job Category Mapping details.
- Complete Job Pull field mapping requirements.
- Analyze current ATS Apply workflow, complete Apply Questionnaire and Field Matrix.
- Review ATS and CRM integrations (Hiring Status).

Expected Customer Follow-up Actions (General):

- Complete any outstanding integration mapping files for:
 - Job Categories
 - Job Pull
 - Apply Flow
 - Hiring Status
- Provide Phenom with integration access for any/all integration methods.

Workshop 3 - Technical Configurations Workshop

Date and Duration: Week 4, 90 minutes

Attendees: Project Manager, IT Lead, TA Business Leader.

Objective: Gather requirements for technical configurations across the platform.

Prerequisites: Complete Phenomenally Phast Technical Integrations course (approx. 1 hour) in the Training Academy.

Agenda Topics:

- Define career site subdomain.
- Review SSL Certificate requirements and CSR request process.
- Confirm email white labeling requirements.
- Review Single Sign-On configuration requirements.
- Identify Job Distribution requirements.

Expected Customer Follow-up Actions (General):

- Establish subdomain and obtain SSL certificate.
- Create subdomains and DNS records to complete email whitelabeling process.
- Configure Single Sign-on from federated system.
- Provide username and email for all licensed seat holders in CRM, Analytics, and CMS.

Workshop 4 - CRM Configuration Workshops

Date and Duration: Week 5 on, 60 minutes each

Attendees: Project Manager, TA Business Leader. Optionally you can include your HRIS Administrator and/or Recruitment Champions.

Objective: Configure the CRM in line with Phenom best-practices to optimize business processes. To be conducted over a series of calls.

Prerequisites: Completion of Phenomenally Phast CRM and Analytics Onboarding course (approx. 6-8 hour total) in the Training Academy. To be completed in stages aligned with specific workshop session meeting agendas.

Agenda Topics:

- Review current state and desired future state with respect to recruitment efforts and the use of the Phenom platform.
- Discuss CRM best practice use cases in alignment with recruiting goals and team structure.
- Review CRM configurations needed to launch and support business processes, such as note types, event types, user defined fields, and templates.

Expected Customer Follow-up Actions:

- Configure desired settings in CRM in line with business needs.

Platform Testing Kickoff Meeting

Date and Duration: Week 13, 60 minutes

Attendees: Project Manager, HRIS Administrator, Digital Marketing Lead, IT Lead, TA Business Leader.

Objective: Review user acceptance testing process; initiate testing.

Prerequisites: Completion of all five Workshop follow-up actions.

Agenda Topics:

- Discuss goals and objectives of UAT.
- Review distinction between defects, change requests, and enhancements.
- Demo and training of UAT site.
- Provide all team members with access.
- Review test cases and process for reporting defects.

Expected Customer Follow-up Actions:

- Conduct end-to-end (E2E) testing of career site.
- Report defects to Phenom.
- Re-test after defect remediation.
- Sign off on completion of UAT and approve production deployment.

Go-Live Readiness Meeting

Date and Duration: Week 16, 60 minutes

Attendees: Executive Leadership, Project Manager, HRIS Administrator, Digital Marketing Lead, IT Lead, TA Business Leader.

Objective: Confirm readiness for production deployment

Prerequisites: UAT signoff and approval for Go-Live.

Agenda Topics:

- Complete the Go-Live Checklist

Expected Customer Follow-up Actions:

- Redirect legacy career site traffic to Phenom-hosted career site.



The Phenom Talent Experience Management (TXM) Platform unites best practices from customer relationship management (CRM) and talent acquisition to provide your organization with a best-in-class automated system for managing the talent relationship lifecycle, driving awareness, interest, engagement, and acquisition. At the heart of the platform are robust CRM and Analytics tools that work together to help your teams increase your talent pipeline and make more informed recruitment marketing decisions.

The following resources are provided to assist your team in onboarding as a new Phenom customer. To help team members locate relevant materials, the below resources are organized by role.

TA Business Team Jumpstart

The Phenom TXM platform helps recruitment teams attract, engage, and build relationships with the right talent by evaluating insights and metrics during every touchpoint along the candidate journey. To accelerate your onboarding, your team should meet to review the below resources in advance of project meetings.

Phenom TXM Platform Overview

This [TXM Overview](#) video offers a high level review of the key features and functions of the Phenom TXM platform, including the Career Site, CRM, Analytics and more. More detailed experience-level videos are available in “The Phenom TXM Platform” course in the Phenom Explorer Training Academy.

Phenom CRM and Talent Analytics Overview

This [Phenom CRM and Talent Analytics Overview](#) provides a high-level review of the key features of the Phenom CRM and Talent Analytics products, including candidate and requisition management features, email campaigns, events, and analytics.

Content Team Jumpstart

An important element of the platform, your Career Site helps drive the data to your CRM by offering job seekers a hyper-personalized experience. To accelerate the development of your Career Site, your team should meet to review the below resources in advance of project meetings.

Design Guide

[The Phenom Design Guide](#) explains how your team will collaborate with Phenom in the development of your Career Site. The guide explains key features and functionality, outlines the process by which the site is built, and reviews the key decisions your team will need to make.

Career Site Architectural Canvas Guide

[The Career Site Architectural Canvas Guide](#) provides an overview of the out-of-the-box layouts provided by Phenom. Designed based on Phenom's extensive industry experience and best practice knowledge, these architectural templates optimize your site for the best candidate experience.

Designing Accessible Career Sites

[The Accessibility Best Practices](#) document offers ten tips and tricks on how to ensure your Career Site is designed with user accessibility in mind. For more detailed information regarding site accessibility, we encourage you to read our [WCAG 2.0 Accessibility Overview](#).

Technical Team Jumpstart

As a cloud-based SaaS solution, the Phenom TXM Platform does not require much technical support from your Information Technology team. There are, however, a few configurations needed to support your organization's use of the platform, some of which include creating subdomains and DNS records,

whitelisting IPs, and setting up Single Sign-On. To accelerate onboarding, your team should review the below resources in advance of project meetings.

Email Whitelabeling Configuration Guide

Understanding the importance of brand identity and domain reputation, Phenom works with your team to whitelabel emails sent from the platform. Our [Email Whitelabeling Configuration Guide](#) walks your team through the process and includes a helpful deliverables checklist.

Career Site SSL Certificate Configuration Guide

To provide secure, encrypted communications between your Career Site and job seekers' browsers, Phenom requires all customers secure a digital certificate. [The Career Site SSL Certificate Configuration Guide](#) details the process of submitting a CSR request to Phenom and what your team needs to provide after purchasing an SSL Certificate.

Production Readiness Guide

Planning for and coordinating your Go-Live is a critical part of the onboarding process, as a successful launch supports long-term satisfaction with the solution, and adoption of Phenom across your organization. The [Production Readiness Guide](#) outlines how your project team and the Phenom project team will work together to ensure a successful Go-Live.

Integrations Team Jumpstart

Phenom understands the importance of ensuring your system of record (ATS) and your system of engagement (CRM) work together to support your recruitment efforts. With an ATS agnostic platform, Phenom can integrate with any ATS to seamlessly capture job data, candidate and application data, and hiring status updates. We'll guide you through the process of integrating your ATS with Phenom during your onboarding experience. To accelerate these efforts, your team should review the below resources in advance of Kick-Off and the Integration Workshop.

Job Pull ATS Integration

Post requisitions to your career site with ease with a Phenom Job Pull Integration. [The Job Pull ATS Integration Guide](#) reviews the integration features and methods supported.

Job Apply ATS Integration

We know hiring the best-fit talent means supporting candidates at each step of the journey, especially the application process. The Phenom Apply Integration with your ATS ensures your candidates won't know where Phenom ends and your ATS begins, making the process smoother so they are more likely to finish what they started. [The Job Apply ATS Integration Guide](#) reviews the integration features and methods supported.

Hiring Status ATS Integration

The Phenom Hiring Status Integration with your ATS ensures your teams have full visibility into your hiring pipeline and funnel from within the Phenom platform. [The Hiring Status ATS Integration Guide](#) reviews the integration features and methods supported.

Are you a Workday customer? Check out our detailed [Workday Integration Guide](#) for more detailed information.