



Product Implementation Checklist



Vendor Contacts & Setup

- ☐ Ben-admin provider name and vendor contact, OR confirmation that you'll manage census directly (we'll review census management during our training calls)
- ☐ Payroll provider name and contact (for optional SSO setup)
- ☐ Other vendor contacts for any SSO integrations

Launch Planning

- ☐ Anticipated launch date

Materials Needed

- ☐ Employee Benefits Guide (PDF)
- ☐ SBCs and Plan Summaries for all elected and voluntary plans
- ☐ Other resource documents (e.g., FMLA, handbook, wellness docs)
- ☐ Company Branding Guide (usually from your marketing team)

White-Labeled App Assets (If Applicable)

- ☐ App Icon: PNG 1024x1024
- ☐ Login Page Logo: PNG, transparent background, 6:2 aspect ratio preferred
- ☐ Home Page Logo: PNG 320x240, transparent background
- ☐ Company Color Theme (hex code)
- ☐ App Name (30 characters or less)

Optional (To Be Reviewed on Product Review Call)

- ☐ Interest in automated messages (e.g., birthdays, onboarding, anniversaries)
- ☐ Use of recognition templates
- ☐ Participation in Custom Challenges & Rewards (add-on package)

Have questions about getting started?

Reach out to your Customer Success Manager for help reviewing what's needed to begin building out your solution.