



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.

