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.