

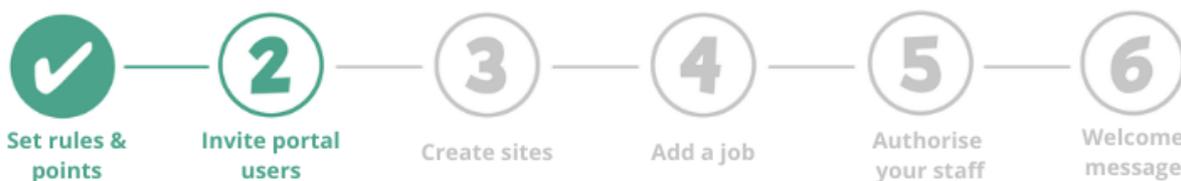


Care Friends[®]

Portal set up and launch guide

We've created your Care Friends portal and completed Step 1 of your set-up: Set rules and points 🎯

In this guide, we will take you through the remaining five stages of setting-up your portal in easy, bitesize chunks:



Step 2 - Inviting your admin users

This section covers **step 2** - inviting any colleagues who'll need access to the portal as admin users. This could be your managers, admins or finance team.

Just before we do, if they aren't aware of Care Friends and excited about the launch already, you'll need to give them reasons WHY they should get involved. Here's some help to do that:

Telling them face to face?

- 1) Share this short [video](#) explaining how Care Friends can benefit your organisation
- 2) Download this short [crib sheet of reasons](#)
- 3) Presenting this to a group of colleagues? Here's a [PowerPoint template](#) you can customise

Telling them via email?

- 1) Here's a [draft email](#) you can adapt

2) Here's a short intro [video](#) to share

You can find tips and advice on introducing Care Friends to your team in our launch guide and toolkit

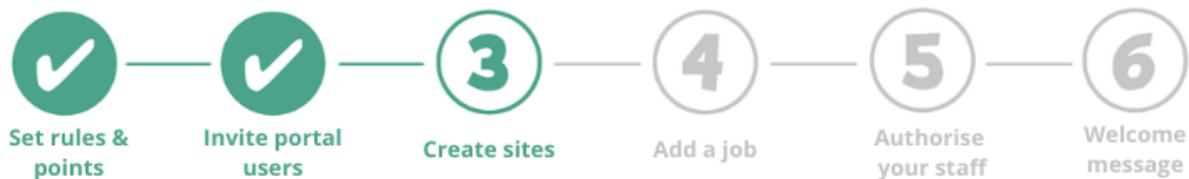
[Go to launch guide!](#)

[Go to toolkit!](#)

Only after your portal users have been introduced to Care Friends and are excited to get started, click [here](#) for a step by step guide to inviting them.

Need help with introducing your admin users to Care Friends or inviting them to become portal users? Your Customer Success Representative will be happy to help.

- Email Nicola nicola@carefriends.co.uk or Em em@carefriends.co.uk
- Phone us direct Nicola 02038279474 or Em 02038279476
- Live chat with us via the chat button in the bottom right corner of your Care Friends portal screen.



Step 3 - Create sites in your portal

If your organisation features branches, offices, areas or homes that you would like to filter your portal by, please complete this step. If you don't have multiple 'sites' within your organisation, simply skip to Step 4: Adding a job

In step 2 you invited other portal users ✓, now it's time to add the details of the different 'sites' at your organisation. These are the areas, locations or branches that you would like to organise your users, jobs, candidates and permissions by.

Log in to your portal and use our step-by-step guide to add your sites by clicking the button below:

[Take Tour Here!](#)

Need help with sites? Your Customer Success Representative will be happy to help.

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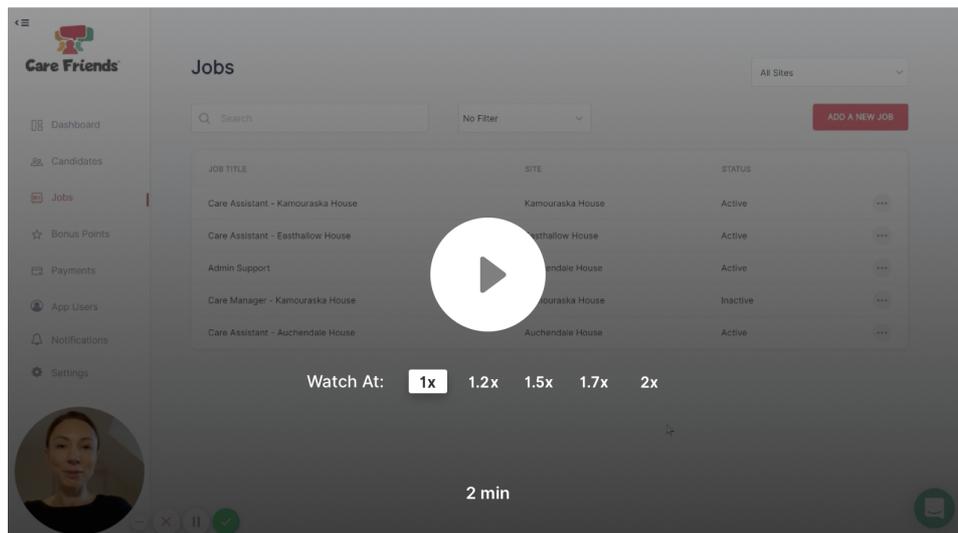


Step 4: Add a job to your portal

It's time to **add a job** to your portal so it's ready for your staff to share as soon as they register.

In this short video, I will show you how to add a job and activate it so it is available for sharing.

Need some help writing your job description? Check out our suggested job ad wording [here](#)



Need help with adding a job? Your Customer Success Representative will be happy to help.

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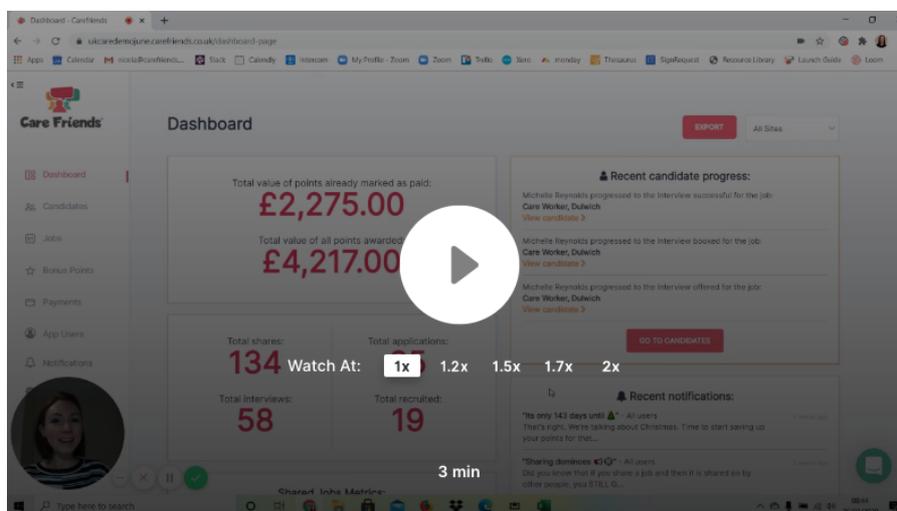


Step 5: Authorise your staff to use the app

Authorising your staff to use the Care Friends app is an **essential** part of your launch preparations.

By adding your staff names, email addresses, phone numbers and sites to your Care Friends portal, you are authorising them to register for the app. You will also have the option to send them invitations to download the app by SMS and email.

Check out this short video for the simple steps to authorising your staff ready for launch. You can also find a step by step guide [here](#).



Need help with authorising your staff to use the app? Your Customer Success Representative will be happy to help.

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Step 6: Set up an app welcome message

The first time your staff login to the app, they will see a "welcome" message which can be customised by you.

We've set a default message, but we recommend personalising it to thank your team and encouraging them to get sharing!

Adding the name and photo of an influential senior manager is a great idea to make the message as personal as possible.

Check out our guide to setting up a custom welcome message by clicking the button below:

[How-to guide](#)

Need help with setting up your app welcome message? Your Customer Success Representative will be happy to help.

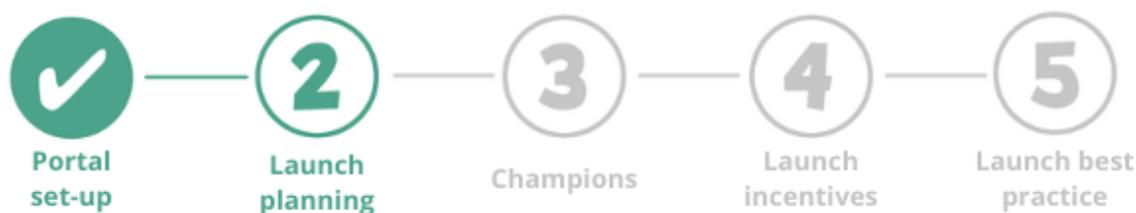
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Care Friends Launch Planning



Now you have successfully completed all your portal set up steps you are ready to start planning your launch! 🚀

In this short guide, we will take you through key steps towards launch:



In our experience, good preparation and planning is the key to a successful launch.

To help you with this, we've created a **step by step guide to launch best practice**, plus a **launch toolkit** featuring all the resources you will need to launch to your team

[Go to launch guide!](#)

[Go to toolkit!](#)

We recommend that your first stop should be our handy [launch checklist](#) and [remote launch tips](#) featuring our most successful launch advice, tried and tested by other providers.

Your Launch Checklist

PRE-LAUNCH

- Ensure you have completed all steps in your portal Quick Start guide
- Upload a csv of all your staff names, emails and phone numbers so you are ready to send out automatic invites
- Present slide deck to your senior team
- Check out the best practice guide for advice and ideas
- Use our launch toolkit to plan your teaser and launch comms
- Get your Champions and Managers to download and install the Care Friends app
- Create jobs in your portal and "activate" them so they are ready for your staff to share via the app
- Decide on your launch incentive
- Plan face-to-face team meetings in advance (think cake, balloons and decorations)
- Make sure your Champions and Managers are feeling confident about using the app and they are super excited for launch day!



LAUNCH

- Send out your teaser comms
- Distribute your launch resources
- On launch day, publicise the app and your launch incentive as much as possible
- Set up a cake and decorations for your launch team meeting (Care Friends can supply balloons and Champions badges) - remember to make it a celebration
- Ask your boss to get involved with your launch plans; kick off a meeting or record a video to send to all staff
- Use the auto SMS and email function in your portal to send invites to all your staff



POST-LAUNCH

- Make sure you follow up your launch using other communications channels
- Celebrate and publicise successes regularly, e.g. how many shares or candidates you have per week / month, or when your first referred starter is hired
- Think about ways you can incentivise further (see best practice examples)
- Take time to talk to staff about the app - find out what they like and don't like, and then adjust your approach



We want to hear from you! For help, or to share feedback, contact support@carefriends.co.uk

During your launch phase, it's important you feel supported.

Please click below to book your launch planning call with your Customer Success Representative:

[Book a Call with Nicola!](#)

[Book a Call with Em!](#)



Launch planning step 3: Choose your Care Friends Champions

The most successful Care Friends launches feature "**champions**", these are usually **managers, admins, recruiters or trainers** who have regular contact with care staff.

Champions will help encourage staff to download the app by regularly including Care Friends in **team meetings, one-to-one calls and training sessions**. They are also on hand to help with questions about the app.

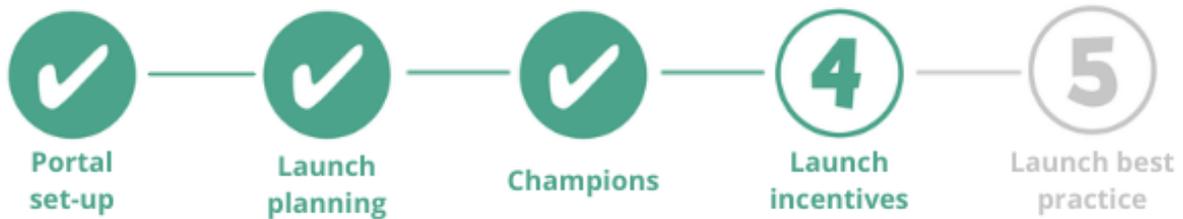
Ideally, a champion is someone who is **enthusiastic, motivated and good with technology**.

Champions are a key link with your staff so it is important that they feel confident and excited about Care Friends - **let's empower them...**

- Introduce them to Care Friends with the help of our '[Launch presentation](#)'
- [Send them an invitation](#) to download the app before launch and give feedback
- Incentivise them to reach sign up goals. One provider achieved 80% sign up in just 2 weeks by offering their champions bonus points for achieving both 50% and 80% uptake
- Support them with the "[Tips for champions](#)" help sheet
- Motivate them with updates on successes and [ideas](#) to help them reach their targets

[Launch Guide!](#)

[Launch Toolkit!](#)



Launch planning step 4: Launch incentives

Incentivise your team to sign up for the app with a welcome bonus!

You could offer:

- An **automated welcome bonus** for everyone who signs up - choose from 3, 5 or 10 points which will appear in the app home screen when they login for the first time 😊

OR

- A **prize draw** to win one of several Care Friends bonus points prizes 🎉

Whichever option you choose, make it time bound to encourage staff to sign up quickly and get sharing!

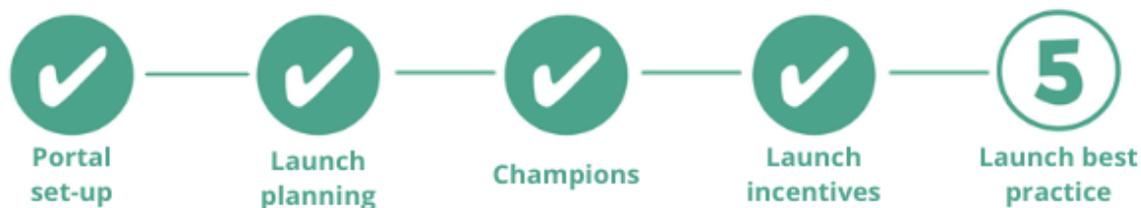
Check out our resources below to help you implement your incentive:

[Set up an automated welcome bonus](#)

Learn [how to award bonus points](#) for your prize draw

[Launch Guide!](#)

[Launch Toolkit!](#)



Launch planning step 5: Launch best practice

You're nearly there! Now is the time to make sure you have completed all of the previous steps and start your final preparations for launch day.

Here's a round-up of our housekeeping and launch tips...

Launch essentials - the things you *must* do before launch

- [Uploading your staff details to your portal](#)
- [Add a job ready to share](#)

Launch good practice

Launch essentials +

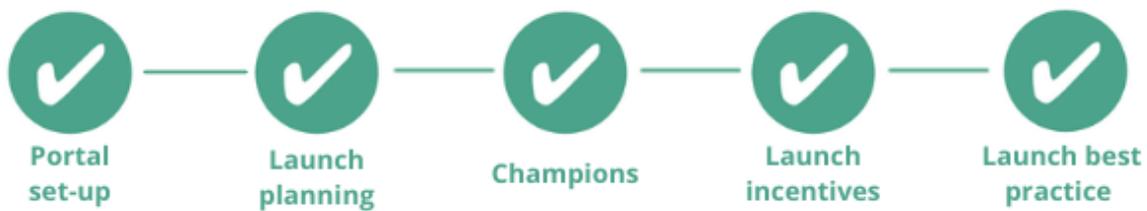
- Read through our [launch guide](#) and choose resources from our [launch toolkit](#)
- [Book a launch call](#) with me to go through some specific launch advice
- Send teaser comms a week before launch by [Whatsapp, text, email and/or social media](#)
- Introduce your portal users and champions to Care Friends and make sure they are happy and excited about launch
- A time-bound [welcome bonus](#) or launch prize draw
- On launch day [send invitations](#) to download the app from your Care Friends admin portal
- Drip feed Care Friends info by [Whatsapp, text, email and/or Facebook](#) on launch day, then every 2-3 days for 2 weeks following launch
- Pre-register and invite new starters to join Care Friends during induction training

Launch best practice

Launch essentials + launch good practice +

- Set up a [custom app welcome message](#)
- Plan a face-to-face team meeting with cake and decorations! Ask your boss to kick off the meeting and show their support for Care Friends.

- If you can't meet face-to-face, host a webinar or ask your boss to record a short [smartphone video](#) and share it via text, email or social media
- Edit and share our [launch presentation](#) at your face-to-face team meeting or webinar
- Give your champions our [champions badges](#), so your team know who to ask about Care Friends
- Pre-register and invite new starters to join Care Friends when they accept a job offer
- Include a copy of our [how to guide](#) with your new staff welcome pack



We are always here to support you with your Care Friends scheme.

- Our [help centre](#) is full of useful step-by-step guides and tutorial videos.
- Our [launch guide](#) and [toolkit](#) feature all of our launch best practice
- You can contact us direct by email Nicola nicola@carefriends.co.uk or Em em@carefriends.co.uk, or phone Nicola 0203 827 9474 or Em 02038279476
- Live chat with us via the chat button in the bottom right corner of your Care Friends portal screen.

We look forward to helping you find more great quality candidates who stay longer!

With best wishes

The Care Friends Customer Success Team



Nicola Ricketts, Customer Success Manager



Em Powell, Customer Success Representative