Sift

# Prepare for Sift-Off!

A guide to rolling out Sift in your organization

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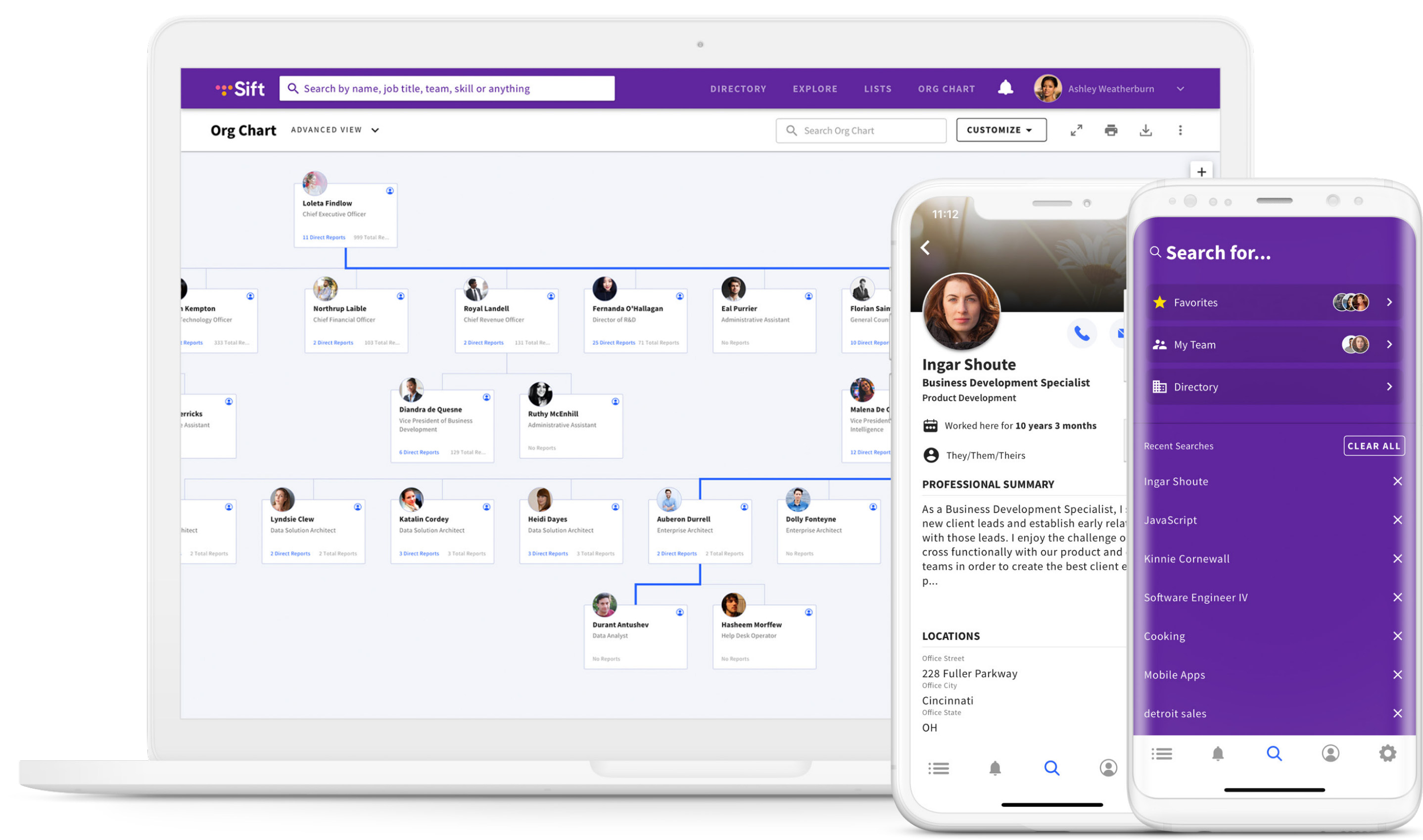


# The Prepare for Sift-Off Overview

**WHAT**

A guide that walks you through each step of a successful Sift rollout, complete with links to all key resources you'll need along the way.

**WHO**

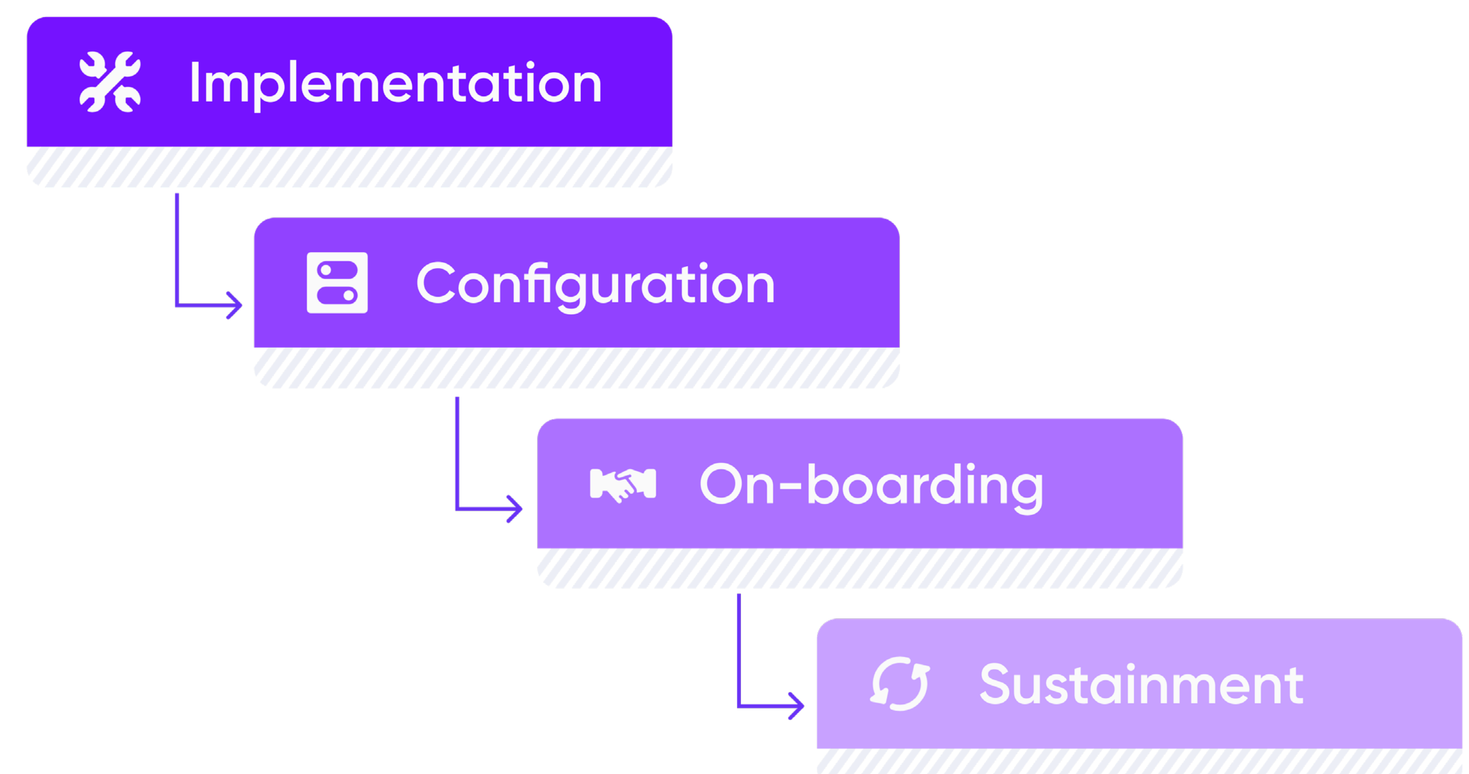
This guide is intended for the employees at your organization who will be working hands-on alongside the Sift team to ensure a successful rollout. A successful rollout will require designated leads for the following activities:

- Technical integrations such as: user data sync, single sign on, and domain whitelisting
- Intranet or software adaptation: being able to download apps on company computers, and adding widgets to intranet
- Company-wide software rollout communication
- Long-term use plan (do you want this added to employee handbooks or on-boarding)

**HOW LONG**

The first two phases—Implementation and Configuration—should take less than a week total. And trust us, we will do anything we can to make that happen. But, a smooth rollout requires a bit of cooperation and effort from both sides—if you work fast, we will too!!

Getting Sift setup for your organization is broken down into 4 phases: Implementation—ensuring your data is syncing properly, Configuration—making sure everything looks how you want it to look, Onboarding—your organization starts using Sift, and Sustainment—you couldn't imagine life without Sift and it has become part of your company culture. This guide will walk you through each step in sequence.




Of course, if you have any questions along the way - feel free to reach out, we are here to help! Let's get started!

**HELPFUL TIP**

If you see any words in orange, click on them to go to the definition. Any words in purple will take you to our help center in your web browser.

# Implementation

**WHAT**

This is what you may call the “techy stuff”.

**WHO**

Sift will likely need to work with an employee from your IT department for this step.

**HOW LONG**

Implementation will take you anywhere from 6 to 12 hours of active work time. This depends mainly on which data sync method you choose to use and how much additional setup is required on your end.

Configuration

On-boarding

Sustainment

**1.1** (ESTIMATED TIME | ~5 MINS PER DIRECTORY)

Set up your Directory (or Directories). In Sift, a Directory is used to represent a segment of your user population. Most companies will have one Directory that contains all your users. However, it is possible to have multiple Directories if needed. Here is more information on Directories.

**1.2** Each Directory will have to have a Primary Source. The Primary Source is responsible for the provisioning of users (addition and deletion), but can also have additional sources for supplemental pieces of data on those same users. You may also need to add a Complementary Source. For example, if you were to store John’s office location in a different system than his name and email address, you would add a Complementary Source to bring in that information. This article has more information on Complementary Sources.

**1.3** Your Primary and Complementary Sources can be synced using the following 3 methods:

- Azure Active Directory | (ESTIMATED TIME | 2 HOURS)
  Microsoft’s cloud-based identity and access management service. Check out this article to learn more about the one-way transfer of data from your AAD to Sift.
- LDAP | (ESTIMATED TIME | 3-4 HOURS)
  This method will let you sync with on-premises systems such as Active Directory or other LDAP compatible sources. Check out this article for more information.
- CSV & SFTP | (ESTIMATED TIME | 2-8 HOURS; THIS INCLUDES AUTOMATION OF DATA INTO INCLUSIVE CSV)
  This is perhaps the simplest way to import your data to Sift. Just upload a CSV file with rows and columns! To automate this process in a secure way, use our easy-to-set-up SFTP integration. Check out this article to learn more about this method.

If you would like to, you can also use a combination of these methods by using Complementary Sources or having multiple Directories.

If you have a different way you would like to do your data sync, please feel free to reach out—we are always willing to work with you!

# Implementation

**1.4** (ESTIMATED TIME | 30 MINS - 1 HOUR)

Next, we need to be sure that all of the data you want to have on your employee profiles is added to Sift. If you aren't adding anything of your own at this point, you can ignore this step for now. However, if you do want to add anything to Sift that is unique or doesn't come out of the box, you can do so by creating your own custom Attributes. This article explains how to create new Attributes.

**1.5** (ESTIMATED TIME | 10 MINS)

Regardless of which sync method you choose or how many Attributes you add, you will be required to set up Mappings. Mappings are translations from a property on a person in your data source, to an attribute on a person in Sift. For example, in a CSV a column header might read "email_user" but on Sift you would want this to appear as "Email". This article will take you step-by-step to set up your Mappings.

**1.6** (ESTIMATED TIME | 2 HOURS)

Does your company utilize single sign on (SSO) for its employees We support single sign on through any provider that supports SAML, such as Google, Azure, or PING. Reach out to us for help getting this configured.

**1.7** (ESTIMATED TIME | ~1 HOUR)

Does your company network block resources from any external URLs? You need to make sure our domains are whitelisted so we don't get caught in your firewall. Reach out to us for an up-to-date list.

**1.8** (ESTIMATED TIME | 4 HOURS)

Sift will allow you to click to email an employee. But, are there any additional chat integrations you may want to use? We can work with you to make this happen, just reach out.

### Implementation Checklist

- ☐ Are your sources syncing properly through one of our data-sync methods?
- ☐ Have you mapped all your Attributes properly?
- ☐ Is your SSO configured?
- ☐ Have you white listed our domains?

Implementation

## Configuration

On-boarding

Sustainment

**WHAT**

This will ensure that Sift looks how you want Sift to look.

**WHO**

All of this can be handled by an employee that has Admin Dashboard access.

**HOW LONG**

This should take no more than 2 hours, assuming your ducks are all in a row before hand.

**HELPFUL TIP**

These steps can be completed in any order, however we recommend that all are completed before you continue to On-boarding.

Sift is highly customizable. We want it to fit in seamlessly with the rest of your collaboration tool stack.

**(ESTIMATED TIME | 30 MINS)**

With this in mind, we allow you to add custom Theming to your company's Sift. You can change your colors and even add your company's logo! Here is an article that will guide you through setting up custom Theming.

**(ESTIMATED TIME | 1 HOUR)**

Another way you can customize your organization's Sift is by changing the Attributes that appear on your employee profiles. You can add custom Attributes and also choose which order the Attributes appear on a profile. This article explains how to create new Attributes and this article explains how to change the Profile Layout.

**(ESTIMATED TIME | 15 MINS)**

Along with all this customization, it is important to have a person or a team at your organization that is well equipped to answer questions that users might have about their Sift profiles or any other features on the tool. Users will be able to submit questions to Sift Support but, who will be answering their questions? This article describes how to assign someone to answer support questions.

### Configuration Checklist

- [ ] How does your Theming look? Is your company logo visable?
- [ ] Do you have any additional custom Attributes to add?
- [ ] Are your employee profiles layed out in the way you'd like?
- [ ] Have you identified a person or team that they will be responsible for Sift Support?

Implementation

Configuration

## On-boarding

**WHAT**

How will your employees learn about Sift? What expectations will you set?

**WHO**

This will require some IT or Technical folks and some non-technical folks.

**HOW LONG**

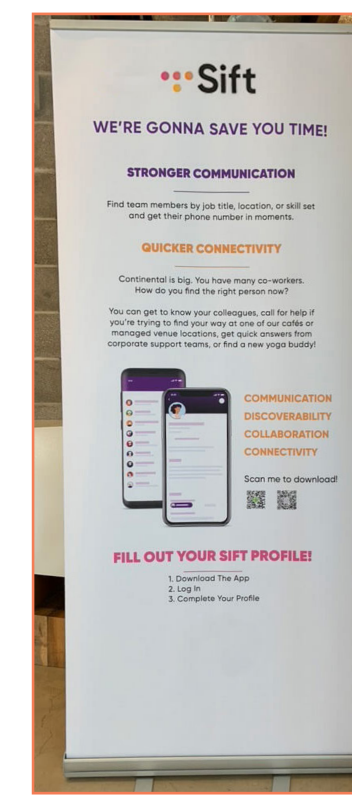
We have things prepared for this, but really this is all about your employees. How might we work with you to ensure everyone is able to get into their Sift profiles, and gain value from the tool as quickly as possible?

Sustainment

The on-boarding step is all about making sure the employees at your company know about Sift and are able to use and love it with ease. You will eventually have to introduce Sift to everyone at your organization, and we understand there might already be a process for this at your organization that works well with your existing culture.

However, based on our previous successful rollouts, here are our suggestions on how to make on-boarding smooth:

- To easily access Sift without opening up a browser every time, push-install our desktop apps for both Windows and Mac on your company computers. This page from our website includes the links to download the apps.
- For employees who are constantly on the go such as sales teams or executives, we also have a mobile app, Sift Connect. It is available to download for iOS and Android.
- If you have a company intranet or other internal webpage, you may want to add a link to Sift and/or install our Custom Widget that will take your employees directly to Sift. This help page will show you how to create your Custom Widget.
- In some cases, our clients have found it helpful to create physical pamphlets or post banners around the office. If you think this would be beneficial, let us know and we can work with you and provide more suggestions!
- With the goal of achieving a high adoption rate while keeping the entire rollout to 30 days, we would like to suggest sending emails from leadership at your organization. If employees see leaders setting a good example, they will likely follow.



# On-boarding

Here is one of our many suggested emails you may send to your employees. We can work with you to make this more personalized as well.

The first of three emails is to come from a person with great influence at your organization. Typically, this is a President, CEO, or Founder. This will be the first time most people at your organization hear about Sift.

To see more example emails, check out this help article.

To:  CC  BCC

From:

Subject: Check out our newest tool - Sift!

Source San... 14

Hello {{Company Name}},

Hopefully you all are having a great week. I am happy to introduce you all to our newest tool, Sift! Check out this cool video that explains the product a bit more. Sift is {{Insert use-case for company here}}. I am excited to see the impact Sift will have across our company!

The first step in this is for all of you to login and fill out your profiles.

Please visit {{Company Sift URL}} to get started. The process is very straightforward but feel free to reach out to {{Support Email}} if you have any questions along the way.

For a bit of inspiration, check out my Sift profile! {{URL to their Sift profile}}

Thanks and happy Sifting,

CEO/Pres

Send

### On-boarding Checklist

- [ ] Does your entire organization know about Sift?

Implementation

Configuration

On-boarding

Sustainment

**WHAT**

Arguably, this is the most important of the 4 steps. We want to ensure that Sift creates a real impact at your organization and employees feel more connected overall.

**WHO**

Everyone!

**HOW LONG**

Well, how long do you want to continue using Sift? Gain value from the tool as quickly as possible?

For a new product to have an impact at any company, it has to be sticky. No, we don't mean literally sticky, we mean that the product will eventually become a part of every employee's day-to-day and your overall company culture.

But, how can we make Sift stick? How can we ensure that it is second nature for someone to open Sift when they are looking to connect with someone? Here are a few suggestions:

- ***When a new employee joins the team at your organization what is the on-boarding process like and how can Sift be involved?*** New employees are some of the biggest users of Sift as they are quickly trying to learn about their new co-workers. It will be important that "filling out your Sift profile" is now a step in your employee on-boarding process. There is no better time to have people fill out Sift than those first few days on the job when they are probably setting up everything else anyway.
- ***Does your organization have an employee handbook?*** It is highly likely that every employee at your organization has a copy (or access to a copy) of this document. In some cases, this might even be a printed book! Let's be sure Sift is added into the next version of your employee handbook.
- ***Is there regular technology training at your organization?*** Maybe you teach new employees how to use their desk phones, a certain software, or how to properly send an email to multiple people. How can Sift fit into this training? We would be happy to discuss the best ways to make this work.

We understand that every organization is unique and has their own culture. This said, we are willing to work with you to ensure that Sift, seamlessly, becomes a part of the culture at your organization. Have ideas? **Let's talk!**

# Terminology Guide

**HELPFUL TIP**

You can click on any word to go back to it's page in this guide.

### Attribute
Describes a common piece of data on your people, such as an office phone number, a collection of skills, or an email address. Attributes can be created and updated by admins, added to profile pages, and/or be imported from your data systems.

### Azure Active Directory
One of our three data sync methods. Azure Active Directory (AAD) is Microsoft's cloud-based identity and access management service.

### Configuration
The second step in getting Sift set up for your organization. Configuration mainly deals with the appearance of your organization's Sift.

### Complementary Source
A Complementary Source provides supplemental pieces of data for users. Not all Directories must include a secondary source. Be sure to include the same primary key on the Complementary Source as you did on the Primary Source.

### CSV + SFTP
One of our three data sync methods. You are able to add data into Sift via a spreadsheet saved as a .csv. To automate this process in a secure way, use our easy-to-set-up SFTP integration.

### Custom Widget
Allows easy access to Sift from your company intranet through embedded HTML.

### Directory
Used to represent a segment of your user population coming from your data sources. Most organizations will have one Directory that contains all of their users. However it is possible to have multiple Directories if some of your user data is in a different place.

### Implementation
The first step in getting Sift set up at your organization. During integration you are ensuring that all of your data is sent to Sift properly and appearing on Sift profiles neatly.

### LDAP
One of our three data sync methods. This method will let you sync with on-premises systems such as Active Directory or other LDAP compatible sources.

### Mappings
To ensure your data transfers to Sift correctly, you must create mappings from your data source to Sift's attributes. An example is mapping "employee_email" to show as "Email" in Sift.

### On-boarding
The third step in getting Sift set up at your organization. On-boarding helps to ensure that all employees at your organization are aware of Sift and how it will benefit your organization.

### Primary Source
Responsible for the provisioning of users (addition and deletion), but can also have additional sources for supplemental pieces of data on those same users. Each Directory will have a Primary Source.

### Profile Layout
The order in which Attributes appear on a Sift profile page.

### Sift Support
The ability for an admin to assign an email to receive all Sift questions. Also the ability for an employee to contact someone at their own organization to help them with Sift.

### Sustainment
The fourth and final step in getting Sift set up at your organization. Sustainment ensures that Sift will be known, loved, and useful to your organization for years to come.

### Theming
The ability to add colors, logos, and default photos to your organization's Sift.

# *Helpful Links and Contacts*

## Sift Public Website

If you want to learn more about Sift or share Sift with anyone outside of your organization, we encourage sharing our website with them as it will reflect our most up-to-date information.

## Sift Help Center

Many of the links in this document link out to our Help Center. This is a good place to go for even more information about how to use Sift.

## Sift Contact

support@justsift.com

If you have any questions about the content in this document, or otherwise, please reach out! We are happy to help and want you to have the best experience possible.

ideas@justsift.com

If you, or someone else at your organization, has an idea on how we can make Sift even better - please let us know. Some of our best ideas come from our clients!

## Sift on LinkedIn

Follow us on Social Media to keep up with the latest news and see what we are reading and writing.

## Sift on Twitter

Follow us on Social Media to keep up with the latest news and see what we are reading and writing.

Sift

www.justsift.com