



Onboarding Playbook

EDGE helps leaders **succeed at every stage of the leadership journey**. This comprehensive digital content library teaches **essential skills for building a thriving business, creating a high-performance culture,** and everything in between. Whether you want to **strengthen your own leadership skills or build your leadership team**, and whether you are new to leadership or have years of experience, EDGE has a solution for you.

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Launch Strategy & Promotion

Onboarding Model – Top-Down Approach



Strategic Onboarding Meeting

Your HPN Account Manager will coordinate a call to discuss the following:

- Company Hierarchy/Structure for EDGE Subscription
We will review the terms of the subscription agreement regarding number of branches/agencies and the number of users within each of those.
- Key People
HPN will request a designated administrative point person, and an implementation “Champion” in each group. We will also need to identify appropriate Home Office representatives to oversee the entire subscription.
- Branch Onboarding/Rollout Strategy
We will discuss and/or review the timelines and key phases in onboarding your field users.
- User Access Setup and Maintenance
HPN will outline the process for keeping your user list up to date and discuss the frequency for compiling those updates.
- Correspondence and Marketing
We will discuss correspondence and marketing materials your users will receive from HPN.
- Key Indicators & Metrics
How can HPN partner with your organization to track and measure success?

As part of our Enterprise Onboarding procedures, HPN requests some information from your organization which will enable us to provide effective client service to your Home Office and the field:

- Company Personnel Hierarchy (Flowchart or List)
- Role/Title list and definitions
- Zone/Territory Map
- Company-specific Acronyms List
- Managing Partner List with Contact Details

Sample Onboarding Timeline

N/A	<u>Company Hierarchy/Structure for EDGE Subscription</u> We will review the terms of the subscription agreement with regard to number of branches/agencies and the number of users within each of those.
1-2 Weeks	<u>Key People</u> Designate and onboard an Administrator and an implementation “Champion”.
4 Weeks	<u>SSO/LMS Development</u> HPN will work with your IT team and/or third party LMS platform to facilitate deep-linking, user set-up stream, etc.
1 Week	<u>User Access Setup and Maintenance</u> HPN will outline the process for keeping your user list up to date and provide administrative training.
2-4 Weeks	<u>Branch Onboarding/Rollout Strategy</u> We will discuss and/or review the timelines and key phases in onboarding your field users.
N/A	<u>Correspondence and Marketing</u> We will discuss correspondence and marketing materials your users will receive from HPN.

Web Platform & Customization Options

Single Sign-On (SSO) Integration

SAML Single Sign-On Integration

- \$10,000.00 per SAML SSO connection

Custom integration to support SAML Single Sign-On standards. SAML provides a secure and trusted authentication layer to the login process. User data is encrypted between client and HPN. Includes configuration of affiliate relationship for the secure exchange of authentication and authorization data between HPN and Client domain.

SSO Integration Revisions

- \$2,500 per revision project.

Content Customizations

Custom Self-Study Company Course Bundles with HPN Content

- \$1,000.00 per Custom Course - up to (10) videos in a course
- \$25.00 per Custom Thumbnail (per course)

HPN will provide custom courses for your company's HPN University experience. A custom course is defined as a series of HPN videos organized at the client's preference. A minimum of (10) videos is needed for course customization. If custom thumbnails are required, the cost for each thumbnail is additional.

Custom Course Bundles with Company/Proprietary Content

- \$1,500.00 per Custom Course - up to (10) videos in a course
- \$25.00 per Custom Thumbnail (per course)
- \$10.00 per month per video for HPN storage*

HPN will provide custom courses for your company's EDGE experience that include videos provided by the client company. A minimum of (10) videos is needed for company course customization. If custom thumbnails are required, the cost for each thumbnail is additional. HPN requires all videos to be submitted with the following guidelines:

- ✓ Submitted in MP4 format
- ✓ Encoded between 2.5MB per second to 5.5MB per second
- ✓ With a short 2-3 sentence description of the video
- ✓ Any company specific pre-roll inserted (HPN will not provide pre-roll)

**Each of the costs listed are one-time fees except the storage fee, which is a monthly fee.*

Content Curation and Curriculum Design

- Priced on a case-by-case basis

HPN's Client Engagement Specialist will curate and design a purpose-built course for your company's HPN University experience. Additional fees for Custom Content publishing as listed above.

Custom Branded University (White-Labeling)

- \$2,500.00 one-time fee

Customize your user interface with the color palette and logo that reinforce your company's brand.

Branding Requirements

To ensure the best setup and service for your custom branded Hoopis Learning Environment, we ask that you provide us with the highest quality marketing materials available. These materials help us ensure that we are not only providing you with a first-class user experience, but also help us with producing a product that meets your corporate requirements consistent with your brand. If possible, please provide the following items:

1. Corporate Marketing Guideline - This document typically includes the following:
 - Corporate logo usage and accepted variations of the logo (i.e., inversed color scheme)
 - Logo usage
 - Fonts/sizes
 - Pantone Colors (print) and Hex colors (web safe)
 - Examples of the acceptable usage in branding materials
2. .eps or other high-quality logos (ai, jpg or tiff)
3. Font files if the font is a "special" font
4. Preferred Marketing Flyers (as pdf)
5. Any other materials unique to your brand

Branding Guidelines



Design

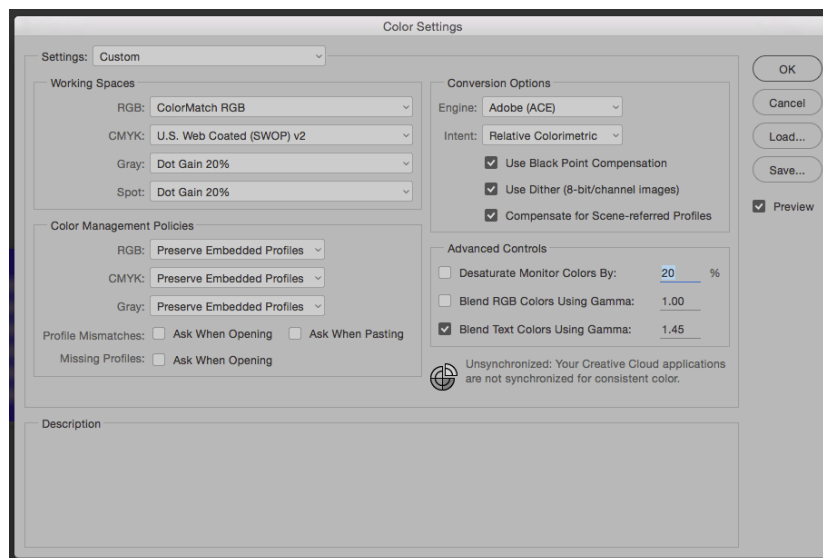
1. Logo – File size is a maximum of 320 by 64px
 - a. For the best result, scale logo by height and remove remaining width on the image. I.e., if the width of your logo is 280 by 64px, remove the extra 40px from the file width.
 - b. For the best result, align your logo left, then give about 5px margin on the left size.
 - c. Giving a couple of pixels margin on the top and bottom gives a better overall look on the platform.

**** The same logo is used on the log-in/log-out screen, by following the above guidelines, this will ensure quality in each section where the logo is represented.
2. Banner - File size is a maximum of 1024 by 190px
 - a. Due to the responsive nature of EDGE, the banner is constrained to the above file size to maintain a reliable experience though any web browser.
3. Background Banner
 - a. While the background is customizable, it is currently constrained to Hexadecimal color values only. No patterns or images are currently accepted.

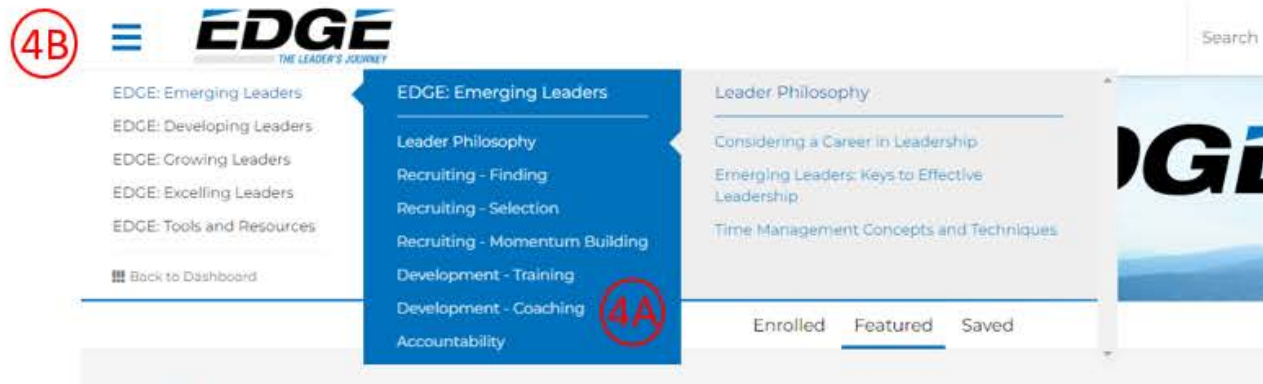
*** Final files should be delivered as web optimized .png or .jpg files

*** If source files are included, any small issues can be addressed by the HPN production department.

If you wish to have your banner “bleed” into the background, the best result is to set up your Photoshop/Illustrator file to ColorMatch RGB. This will ensure there is no variation of graphic/web colors. (Pictured color settings below)



4. Menu & accents



- Only the second menu is customizable. This includes both the menu text and background. Please provide a hexadecimal color value.
- The aforementioned color also represents the accent marks throughout the LMS.

Learner/User Experience (LX) Management

EDGE System Requirements

Browser Requirements

Google's Chrome, Apple's Safari, Mozilla's Firefox, Microsoft's Edge & Internet Explorer 11+

Microsoft's Internet Explorer 8-10 are not supported by HPN or HPN's technology partner. At anything less than IE 11, EDGE can be notably inconsistent.

Internet Bandwidth Requirements

The HPN University currently streams content in two levels of definition: HD (High Definition) by default, and SD (Standard Definition) as an option on the video player.

The **HD** setting streams at **3.7 mbps (megabits per second)** of bandwidth.

The **SD** setting streams at **2.1 mbps (megabits per second)** of bandwidth.

Any stream rate below **2.1 mbps** and the video will have extreme buffering problems.

HPN strongly encourages you to test your bandwidth to confirm your internet speed is suitable for streaming video. An easy test can be performed at your office by going to [speedtest.net](https://www.speedtest.net) and simply running the test.

HPN recommends testing your training environment in advance, e.g., dedicated training rooms, remote locations such as hotels, remote offices, etc.

Mobile Requirements

EDGE is web browser based, and scales to your iPhone, Android, or Windows phone.

Ideal connections are Wi-Fi, LTE and 4G. 3G may experience streaming issues. Signal strength and additional access points (personal access points) may affect stream rate.

Firewall Requirements

The EDGE URL (hpnedge.com) is floating IP address. This means that the server address is subject to change at any time.

Whitelisting hpnedge.com and edge.hpuniversity.com on your firewall should mitigate any issues with users not seeing video content.

Course/Session emails come in the form of system notifications as opposed to an email marketing system. hpnedge.hpuniversity.com should be whitelisted as well as the from: "EDGE" field.

Designating an Administrator

Your EDGE Administrator will be responsible for the following:

- Streamline field communications
- Help-desk support for first-round troubleshooting
- Learner access updates (direct to website)

Selecting your EDGE Administrator

The EDGE administrator should be prepared to liaise between the Organization's learners and stakeholders, and HPN's Client Success Team. Familiarity with database/spreadsheet management is essential to the role.

Administrative Procedures & Training

Your Account Manager will provide the designated Administrator(s) with comprehensive training on web platform functionality and Standard Operating Procedures for Learner Management, including recorded tutorials, written job aids, and communication templates.

Components of Learner Setup

- Media Group – Controls what EDGE Library content the learner may access
- Role – Controls website functionality/access permissions
- Office – groups learners by Sales Unit, Branch, Region, etc.

Learner Group

A learner group controls the content available to the learner. All users are assigned one or more EDGE Learner Groups. Consult your HPN Account Manager for more details on Learner Groups for your users.

Role Types

Organizational Role	Typical User Role Type	Number of Offices Assigned to User	Permission Notes
Home Office/Stakeholders	Enterprise Admin	1	Can access reports & assignments for all offices
Functional Departments e.g. Marketing/ IT/	Enterprise Admin	1	Can access reports & assignments for all offices
Regional/District Level Managers (in some cases, Agency level managers)	[Multi]Office Admin	2+	Can access reports and assignments for a select group of offices i.e. an entire District
Agency/Firm/Unit level Managers a.k.a. Front-Line Managers	Office Admin	1	Can access reports and assignments for just their specific office/unit

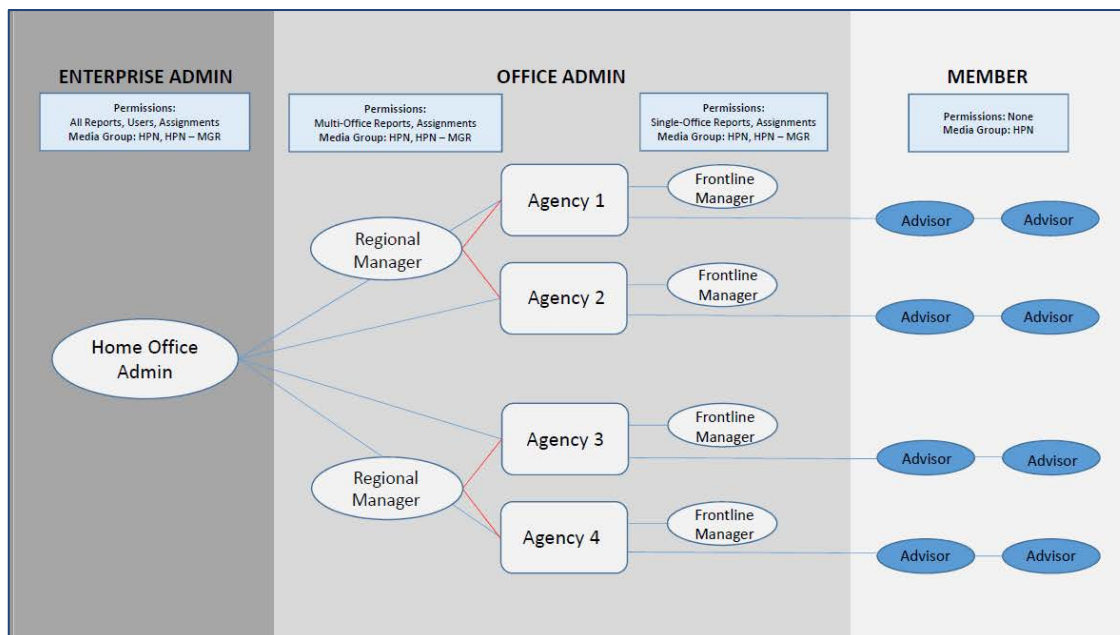


Figure 1 Role Hierarchy Map

Office Structure

On the EDGE platform, “Office” refers to a set group of learners. Most organizations have any number of Offices in their EDGE environment that mirrors their company field hierarchy. An Office can consist of a Sales Unit, a Branch/Agency/Firm, or even

Region/Division/District. The naming convention used for Offices is very customizable, but it's important to use a naming convention that is recognized by field leadership so that data from EDGE's reporting & tracking is meaningful and relevant.

SSO Integration Playbook

If your Organization wishes to proceed with a Single Sign-On (SSO) integration from its LMS/intranet to EDGE, your Account Manager will facilitate the process from project planning, to testing, to delivery. Our SSO Implementation Playbook outlines the process and requirements.

Website Welcome Email Templates

The final stage of Onboarding occurs when EDGE access is given to the field. Our standard Welcome Email template may be used or customized at your convenience.

Welcome Email

Subject: Welcome to EDGE: The Leader's Journey!



Welcome to EDGE: The Leader's Journey!

<Company> is proud to announce they have partnered with the Hoopis Performance Network (HPN) to provide you access to *EDGE: The Leader's Journey*. This comprehensive digital content library teaches essential skills for building a thriving business, creating a high-performance culture, and everything in between. In this library you'll find content designed especially for leaders who are:

- **EMERGING** – advisors interested in exploring and “test driving” the leadership career.
- **DEVELOPING** – leaders needing to build a solid foundation in the knowledge and skills to grow their team.
- **GROWING** – leaders seeking strategies and best practices to advance their team and organization.
- **EXCELLING** – leaders wanting scale and systems to reach the pinnacle of success.

Access EDGE through your personal login credentials below:

Username: your email address

Password: temp (all lowercase)

[Click here to get started!](#)

HPN Client Success Team

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