

Distribute Tab- Messages & Reminders based on criteria

OPTM 360



| Why?

Problem statement

The 360 surveys currently can be scheduled and send invites emails and reminders to all the subject and evaluators at once. We have option to schedule auto-reminders too. The challenge for the user is that all the messaging can be scheduled or sent to ALL or SELECTED participants, but not to the participants based on the rules that match the criteria mentioned below.

Participant's criteria -

1. Subject's Metadata
2. Name or email
3. First name
4. Last name
5. Evaluations received
6. Evaluations
7. Self evaluations
8. Nomination requirements
9. Role
10. Manager Tasks
11. Tasks
12. Has Relationship

User Persona



Jane Doe - HR Manager

User Story

Jane has created a 360 survey. She needs to send the emails to nominators and evaluators for approval and to invite them to take surveys based on the participant's criteria like - participants who have completed the evaluations, or participants who have relationship as Manager with the Subject.

Solution description

With the option to set up criteria before setting up schedules for invites and reminders for participants based on the following criteria will solve Jane's problem.

Participant criteria -

1. Subject's Metadata - Any custom field admin adds to subject can be used as criteria
 - Who have not completed tasks (nominations/self evaluations) Reminders should be sent until the task is not complete.
2. Name or email
3. First name
4. Last name
5. Evaluations received - do we want to add the percentage of participants completed as well
6. Evaluations
7. Self evaluations
8. Nomination requirements - Specify relationship or number of nominations
9. Role
10. Manager Tasks - Approvals
11. Tasks - Nominate, Complete Evaluations Self and Other
12. Has Relationship

Criteria for sending emails (examples) -

Subject Reminder:

Filter by Nominated Raters Count - Administrator should be able to filter the subjects based on the number of evaluators nominated by a subject and send the reminders. i.e If the subject has to minimum nominate 8 nominators any subject with less than 8 must be filtered by criteria so the targeted reminders can be sent out.

Evaluator Reminder:

Target evaluators based on specific subject - Administrator must be able to send reminders targeting evaluators for a particular subject. i.e if the subject needs minimum of 8 completed nomination for the report then we must be able to select any subjects who didn't meet this criteria and send targeted reminders for the evaluators of those subjects.

Target reminders based on relationship i.e Manager - Administrators must be able to select any relationship and send reminders to that particular relationship in a deployment. i.e Completed Managers response is required for the report hence we must be able to send reminders for all the managers with incomplete evaluations.

Target reminders based on nomination period i.e Include or exclude while sending reminder emails. Administrator must be able to pick a time frame from the view and they should be able to select a time period and pull pending nominations from that period and send the reminder to that set of evaluators.

Requirement doc

https://questionpro.zoom.us/rec/share/cjcirqi7P0mdCJ_YHxE33LAWj7WxgZ0_b-iaW5JrdHCe3f-dUd4u9BU_d-Dgx2UL3UJxUOkH7wQXOt5A

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https://questionpro.zoom.us/rec/share/LfawQV0d5zOSpzN-m4pA5d71XtVM8uxkqT0Ph_xpztCs_kU0cKtyf3OYPqxRNY6oZ.JyxmNAOSMfb1AqNm?startTime=1647275632000 (Passcode: @.*wC1h4)

Wireframes

Workforce: 360 Demo

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Edit Distribute Analytics Manage Data

Deployments Send Portal

Participant selection
Participant options
Compose
Templates
Sent history

Invitations Reminders Report ready Approvals

Send email

Type: Subjects invitation To: Selected subjects (32) From: Jose Pardo (jose.pardo@questionpro.com)

Subject: OPTM 360® Invitation

Selected subjects (32)
All subjects (40)
Participants by criteria (40)

Dear S(e//Participant Name),

You're invited to participate in a short survey that will provide you with a customized report. This report is a key component of leaders at <company name>. The OPTM360 is a fast, easy to use tool that provides you with a customized report. Your customized report will show your three priorities for development and provide specific development advice from those with whom you work.

To get started, invitations to participate in a short survey will be sent to the individuals you selected. You will also complete the survey yourself. The survey is easy to complete, typically taking 10 minutes

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Final Wireframes

04 - Compose



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Edit Distribute Analytics Manage Data



Deployments



Send



Portal

Participant selection

Participant options

Compose

Templates

Sent history

Invitations

Reminders

Report ready

Approvals

Type: Subjects Invitation

To: All subjects (40)

From: Jose Pardo (jose.pardo@questionpro.com)



Subject: OPTM 360 Invitation

All subjects (40)

Default template

+ New Selection Criteria

Dear \${e//Participant Name},

You're invited to participate in a new process to accelerate the development of leaders at <company name>. The OPTM360 is a fast, easy to use tool that provides practical advice for your development. Your customized report will show your three priorities for development and provide specific development advice from those with whom you work.

To get started, invitations to participate in a short survey will be sent to the individuals you selected. You will also complete the survey yourself. The survey is easy to complete, typically taking 10 minutes



Font

Size



Source



Send Mail



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Invitations

Send email

Type: Subjects in
Subject: OPTM 3609

to@questionpro.com

Default template

Participant Criteria

New Criteria ▼ Criteria Name

Name or Email ▼ is Field label 🔍 ⊕

Save Criteria

Dear \${e//Participant Name},

You're invited to participate in a new process to accelerate the development of leaders at <company name>. The OPTM360 is a fast, easy to use tool that provides practical advice for your development. Your customized report will show your three priorities for development and provide specific development advice from those with whom you work

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Once sufficient responses have been submitted, your customized report will be made available to you. Your report will show

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Participant options

Compose

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Sent history

Invitations

Send email

Type: Subjects In

Subject: OPTM 3609

to@questionpro.com

Default template

Participant Criteria

New Criteria

Name or Email

Dear {e//Participant Name},

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Send email

Type: Subjects in

Subject: OPTM 3609

Participant Criteria ?

New Criteria Marketing Managers Only

Name or Email is Field label

- First Name
- Last Name
- Metadata
- Has Relationship
- Evaluations received
- Evaluations
- Self Evaluation
- Nomination Requirements
- Role
- Manager Tasks
- Tasks

Save Criteria

to@questionpro.com)

Default template

Font Size

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Sent history

Participant Criteria

New Criteria

Role

+

Save Criteria

Invitations

Send email

Type: Subjects In

Subject: OPTM 3609

Dear S(//Participant Name),

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Type: Subjects In

Subject: OPTM 360

to@questionpro.com

Default template

Participant Criteria ?

New Criteria ▼ Marketing Managers Only

Role ▼ Manager ▼ (+)

Name or Email ▼ is Field label 🔍 (-) (+)

Save Criteria

Dear S(e//Participant Name),

You're invited to participate in a new process to accelerate the development of leaders at <company name>. The OPTM360 is a fast, easy to use tool that provides practical advice for your development. Your customized report will show your three priorities for development and provide specific development advice from those with whom you work

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Invitations Reminders Report ready Approvals

Type: Subjects Invitation To: All subjects (40) From: Jose Pardo (jose.pardo@questionpro.com)

Subject: OPTM 360 Invitation All subjects (40) Default template

Marketing Managers Only (4)

+ New Selection Criteria

Dear \$(e//Participant Name),

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Send Mail

<https://www.figma.com/file/FF0JMk9ukpqnEjkgt9tNK0/OPTM-360%C2%B0---Distribute-Tab---Participant-Criteria?node-id=64%3A10977>