# 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-iaW5JrdHCe3fdUd4u9BU\_d-Dgx2UL.3UJxUOkH7wQXOt5A

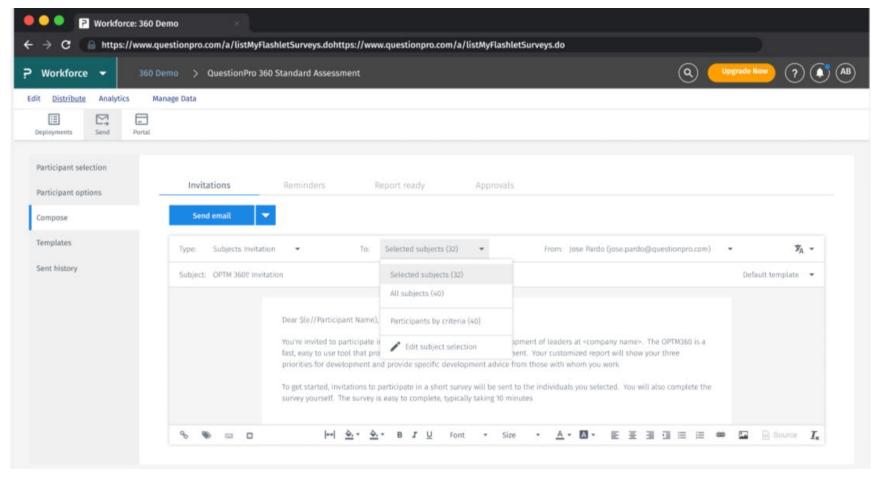
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# Wireframes



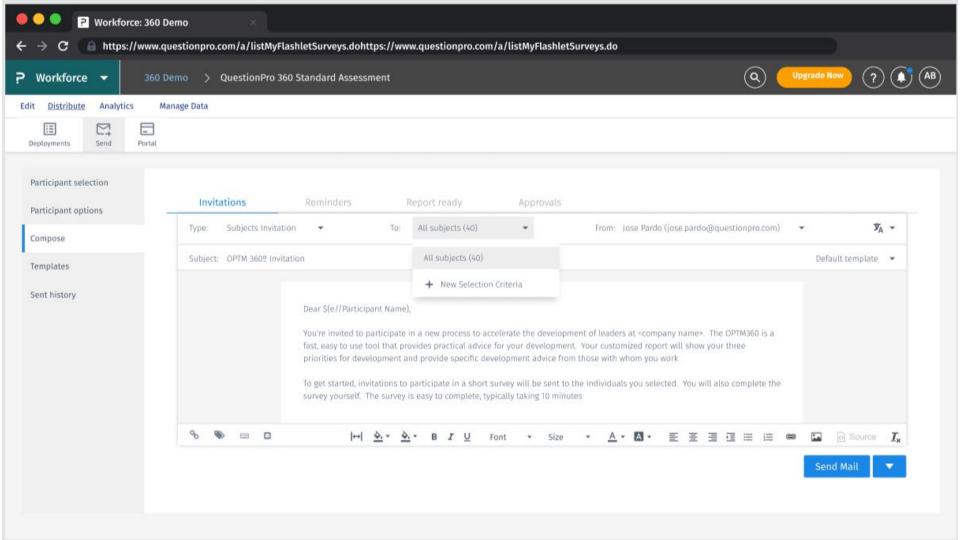


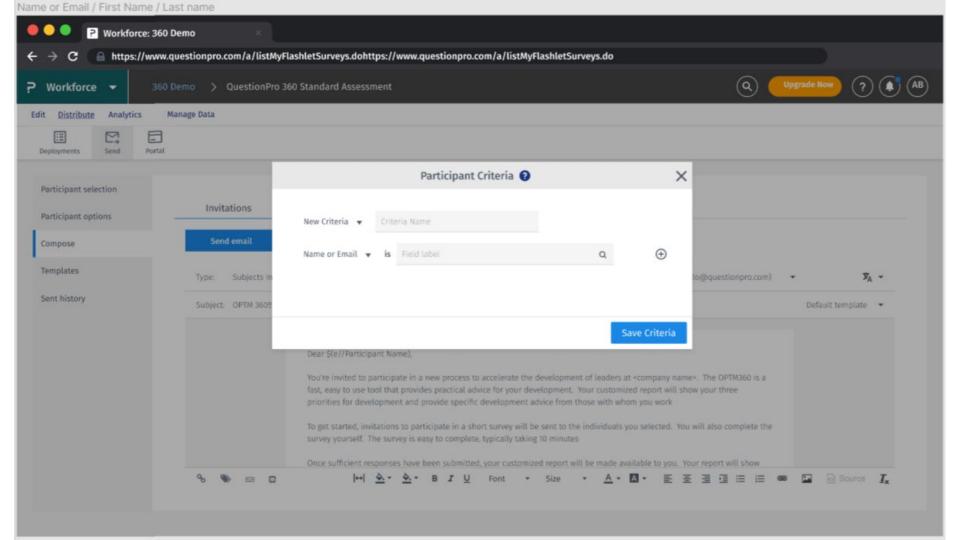


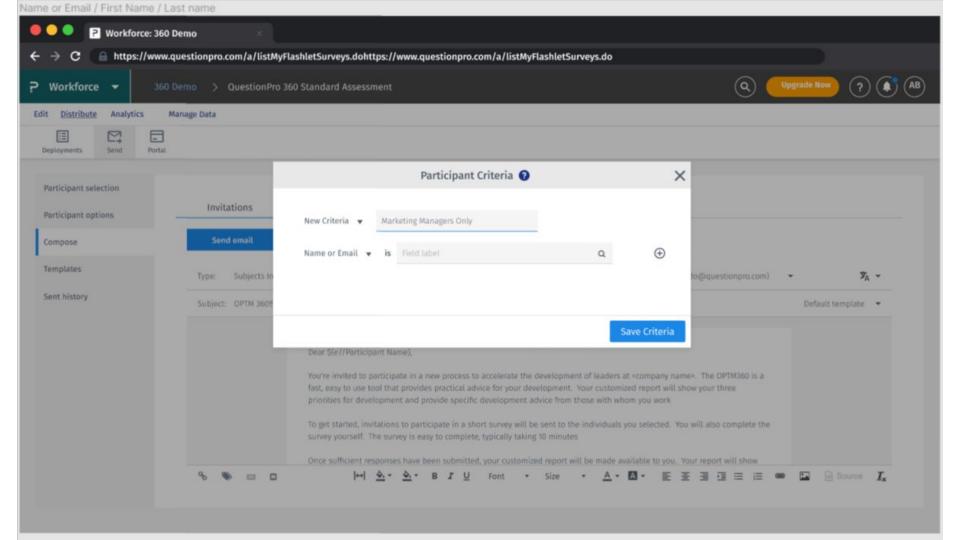
## **Final Wireframes**

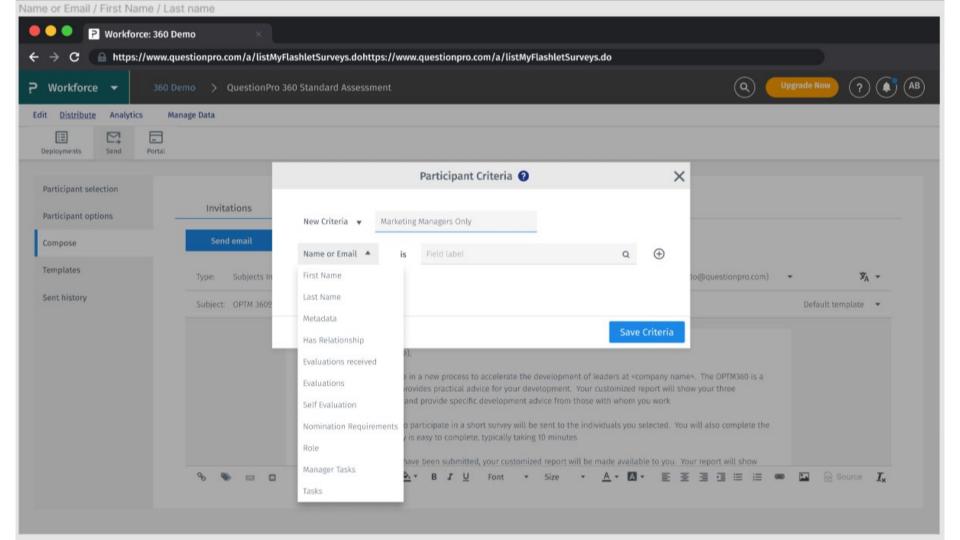


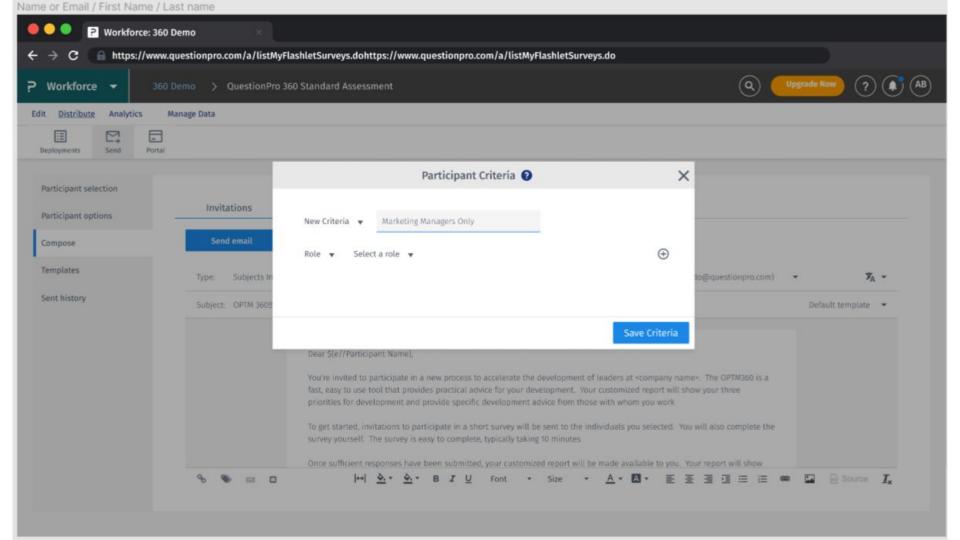
# 04 - Compose

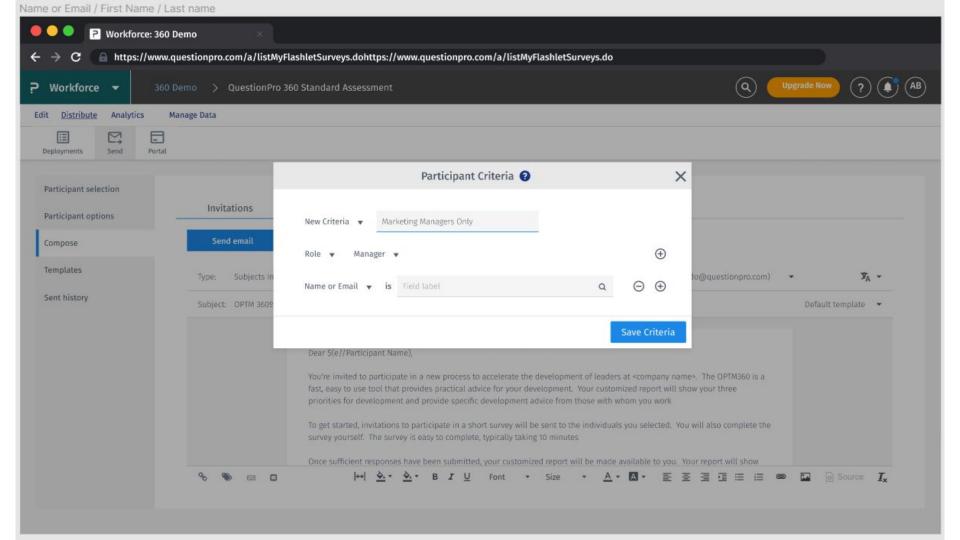


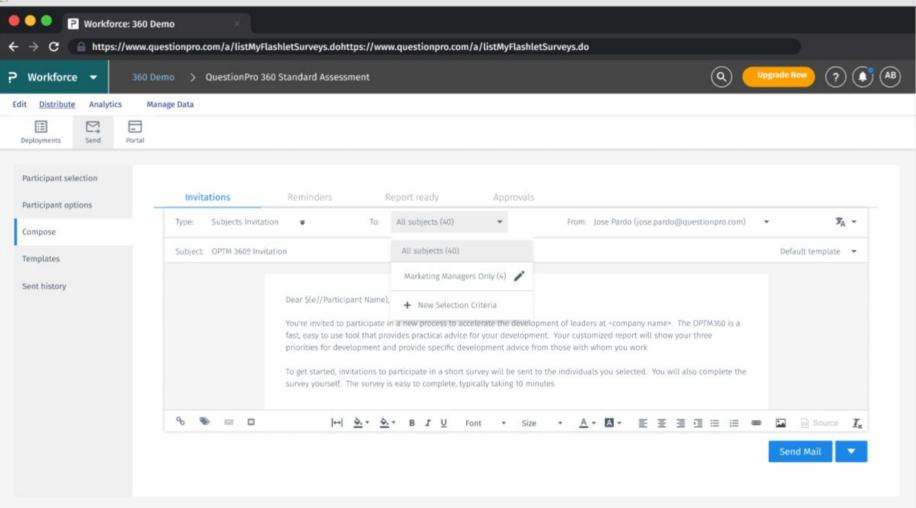












https://www.figma.com/file/FF0JMk9ukpqnEjkgt9tNK0/OPTM-360% C2%B0---Distribute-Tab---Participant-Criteria?node-id=64%3A10977

