



Onboarding Plan

QUICK START PLAN



Phase 1: Development & Integration Setup (Now → December 20th)

1. RotaReady Integration:

- Zoe to introduce Ron/Zenzap dev team to RotaReady tech POC.
- Once introduced, we'll be able to build native integration:
 - RotaReady → Zenzap sync for starters/leavers
 - Import of attributes: Location, Team/Department, Position

2. New Permission Levels (Admin / Manager / Member)

- Zenzap dev team finishing the new permission architecture.
- Ready before Christmas.

3. Prepare Internal Structure

Potters to prepare:

- Department list
- Group naming + structure
- Location mapping (Hopton / Five Lakes)
- Position mapping

4. Manager List

- ~60 managers to be included in the December pre-launch
- Zoe/Thea to send list (name, email, phone)
- Zenzap will import manually (permissions come later)

Phase 2: Pre-Launch (Managers Only) – Week Before Christmas

Owner: Zenzap CSM + Potters HR

Goals

- Give managers/admins early access
- Allow them to test comms, groups, and announcements
- Build internal familiarity before employees join

What Happens

- Create initial Zenzap environment
- Add ~60 managers to the system
- Zenzap will run **onboarding sessions** for managers
- Provide **Manager Pack:**
 - Quick training deck
 - Short video
 - Simple “How to structure groups” guide
 - FAQ
- (Optional): Ron visits resort for in-person tutorials

Phase 3: Christmas & New Year (Infrastructure Only)

During the holiday weeks:

- Final checks on permissions
- Progress integration with RotaReady
- Finalize group structure
- Prepare the bulk user import template



NOTE:

This period is **not** for employee rollout. Only setup, stability, and manager testing.

Phase 4 - Full Company Rollout (Week 1 of January)

Rollout Strategy

- Launch under **one umbrella account**

What Zenzap Will Do

- Bulk import all employees
- Guide Potters on group creation
- Provide messaging templates for comms
- Run optional team training / orientations
- Monitor adoption and address questions

What Potters Will Do

- Send final user list (name, email, phone, location, department, position)
- Confirm final group list
- Send rollout announcement to staff
- Ensure managers help nudge employees to download the app

Phase 5: Stabilisation & Support (First 2–3 Weeks After Launch)

Support Includes

- Monitoring of onboarding
- Quick tutorials for any department that needs it
- Troubleshooting
- Ensuring the RotaReady sync is stable
- Fine-tuning group setup

Once everything is smooth, the system will operate with minimal manual admin thanks to the integration.

Agreed Milestones & Dates

Milestone	Target Date	Owner
RotaReady POC introduction	ASAP (Zoe)	Zoe → Ron
Integration development begins	Within 24 hrs of intro	Zenzap Dev
New permissions ready	Before Christmas	Zenzap Dev
Group structure draft completed	Early December	Potters
Manager list sent to Ron	Early December	Zoe/Thea
Manager onboarding & early access	Week before Christmas	Zenzap + Managers
Infrastructure fully ready	By Dec 24	Zenzap
Employee launch (all 850)	Week 1 January	Zenzap + Potters
Weekly alignment meetings	Every Tuesday 12:00	Ron + Zoe + Thea