Potters Resorts

Zenzap Onboarding Plan for Potters Resorts

zenzap

📌 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 to develop and release the new permission structure.
   - 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

1. Onboarding managers:
   - Give managers/admins early access
   - Allow them to test comms, groups, and announcements
   - Build internal familiarity before employees join
   - 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
   - Ron will visit each resort to provide on-site manager training, helping create a strong foundation before the full rollout (optional)

📌 Phase 3: Christmas & New Year (Infrastructure Only)

During the holiday weeks:

- Final checks on permissions
- Progress integration with RotaReady
- Finalize group structure

> ⚠️ NOTE:
>
> This period is **not** for employee rollout. Only setup, stability, and manager education on Zenzap

📌 Phase 4 - Full Company Rollout (January 7th)

1. **Rollout Strategy**
   - Launch under one umbrella account

2. **What Zenzap Will Do**
   - Bulk import all employees via RotaReady integration
   - Run optional team training / orientations
   - Monitor adoption and address questions

3. **What Potters Will Do**
   - Send final user list via RotaReady (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, Our Customer success team will be taking care of your account for any questions/ideas/requests.

📌 Agreed Milestones & Dates

Milestone	Target Date	Owner
RotaReady POC introduction	ASAP (Zoe)	Zoe → Ron
Integration development begins	Began	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