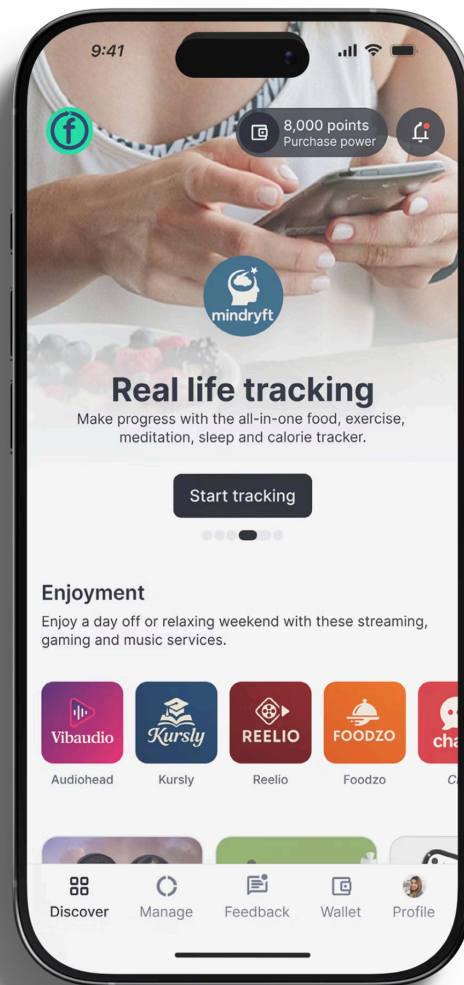


FUFILD CARE-FIRST OS

Built to Empower. Designed to Care.



Fufild exists to fill the Now Gap — that overlooked space between clock-in and clock-out where real life happens. While traditional tools like 401(k)s, perks, or insurance are built for someday, Fufild exists for the 16 hours a day employees are not at work. We empower people — especially the underserved hourly and low-salaried workforce — through our own category: PersonalFulfillment-as-a-Service™ (PFaaS™). We believe that retention, recruiting, culture, and engagement problems aren't the disease — they're symptoms. The real issue is a widespread lack of whole-life personal fulfillment. Our mission is to reverse that by giving people access to joyful, convenient, healthy, and growth-oriented experiences they actually want to use.

The Care-First Strategy: Fufild's Framework for Scalable, People-Centered Support

Because Life Happens Now

The Heart of Fufild

Fufild exists to fill the Now Gap—that overlooked space between clock-in and clock-out where real life actually happens. While traditional benefits like 401(k)s, perks, or insurance are built for emergencies or distant futures, Fufild is designed for the 16 hours a day employees are not at work. We focus especially on hourly and low-salaried employees, empowering them through a modern category we created: PersonalFulfillment-as-a-Service™ (PFaaS™). Because when people feel fulfilled outside of work, they show up differently at work.

Our Model

At Fufild, we believe that retention, recruiting, culture, and engagement issues are not the root problem—they're symptoms. What's really missing is personal fulfillment: the sense that life is supported, not just survived. Our model delivers daily access to joy, health, simplicity, and growth—meeting people where they are, and helping them move forward. PFaaS™ is a system built to restore dignity, energy, and purpose to people's everyday lives, creating measurable value for both the individual and the employer.

Better Than The Traditional

We're not another bonus. Not a perk-of-the-month. Not something employees forget after onboarding. Fufild is a Care-First People Solution—a daily-use platform that builds trust, sparks joy, and increases retention from the inside out. Traditional benefits often feel transactional or inaccessible. Fufild is personal, flexible, and emotionally resonant. Employees choose what matters most to them, and employers see the impact where it counts: culture, engagement, and long-term loyalty. It's more than benefits—it's belief in your people.

How We Deliver It Practically

We deliver Care-First through a structured, team-wide method grounded in real human care, measurable outcomes, and scalable systems.

Anticipate Needs

Care isn't just reaction—it's preparation. We proactively watch for low onboarding rates, drop-offs in engagement, and friction points that could stop someone from using Fufild well. Whether it's an inactive employer admin or an employee who hasn't redeemed, we take the first step. We use data and human insight to send the right nudge at the right time. When we anticipate needs, we show people that we see them—even before they ask for help. That's where trust begins.

Respond with Care

Every response we give should feel like a conversation, not a transaction. We speak plainly—no scripts, no corporate buzzwords—and we make sure every person feels heard before they're helped. Empathy always comes first. Whether someone is frustrated, confused, or just unsure, we meet them with warmth and patience. We don't see problems as interruptions—we see them as invitations to build trust. Responding with care doesn't just solve the issue. It strengthens the relationship behind it.

Follow Through with Excellence

Care isn't complete until the loop is closed. Every unresolved issue leaves a crack in trust. That's why we always follow up—especially when it's inconvenient. Whether the fix takes 15 minutes or 5 days, we log it, track it, and return to it until the person we helped knows they matter. Excellence isn't perfection—it's doing what we said we'd do, all the way to the end. That final message, check-in, or thank-you note? That's where care becomes credibility.

Team Structure for Scale

Role	Core Function
Care Champion	Real-time frontline support for employees. Empathetic, quick, clear.
Employer Success Partner	HR/Admin guide. Ensures full onboarding, communication success, and active rollout.
Insights Analyst	Monitors employee engagement and app usage. Surfaces patterns and proactive outreach points.
Fulfillment Curator	Ensures Marketplace is balanced, engaging, and constantly improving based on user behavior and feedback.

Metrics That Matter: We Measure Care & Impact

How

These metrics balance adoption, engagement, satisfaction, and ROI—giving us a 360° view of Care-First effectiveness.

Onboarding Metrics

Metric	Target	Purpose
Time to Full Onboarding	≤ 15 days	Time is trust. We need to move fast post-sale to realize value.
% of Employees Onboarded	≥ 50%	If we don't reach the people, we don't drive results.
Admin Onboarding Completion	≥ 95%	Ensures all tools and training are delivered and understood.
Time to First Value (Employee)	≤ 10 days	Users need to feel it fast — this defines belief and trust.

Engagement Metrics

Metric	Target	Purpose
Users with 1+ Subscription	≥ 80%	Shows long-term adoption, not just curiosity.
Monthly Active Users	≥ 60%	Keeps the platform "alive" in people's lives.
Points Redemption Rate	≥ 85%	Indicates value, trust, and ease of use.
Repeat Usage Rate	≥ 50%	Proof that Fufild isn't a one-time perk — it's a lifestyle tool.
Category Diversity Score	3 of 4 pillars per user	Suggests broad impact: Joy, Convenience, Wellness, Growth

Retention & ROI Metrics

Metric	Target	Purpose
Employer Retention Rate	≥ 95%	If it works, they stay.
Employee Retention Lift	+10–25%	Our promise: fulfilled people stay longer.
Referral Rate (Employers)	Track for growth	Great care earns word-of-mouth sales.

Experience Metrics

Metric	Target	Purpose
Admin CSAT	≥ 4.5 / 5	Admins need to feel confident, supported, and empowered.
Employee NPS	50+	Will users recommend it to others?
Testimonials	1 per 25 users	Evidence of emotional value + sales proof.
Story Submissions	1 per 50 users	Drives culture, not just metrics.
Care Score Index	Custom metric	Team-level tracking for empathy, speed, and completion quality.

Care-First Readiness Playbook: What Happens When a Big Client Signs Tomorrow?

A clear 15-day launch roadmap for the Care-First team:

Days 0-3: Internal Kickoff & Employer Setup

- Assign Care Champion & Employer Success Partner
- Load employee roster into portal
- Deliver launch kit (emails, printable flyers, QR links)
- Hold Admin onboarding call and FAQ support

Days 4-10: Employee Activation

- First Points Day push live
- Target early adoption via highlight apps (by job type or trend)
- Nudge inactive users
- Share category variety to encourage full-platform use

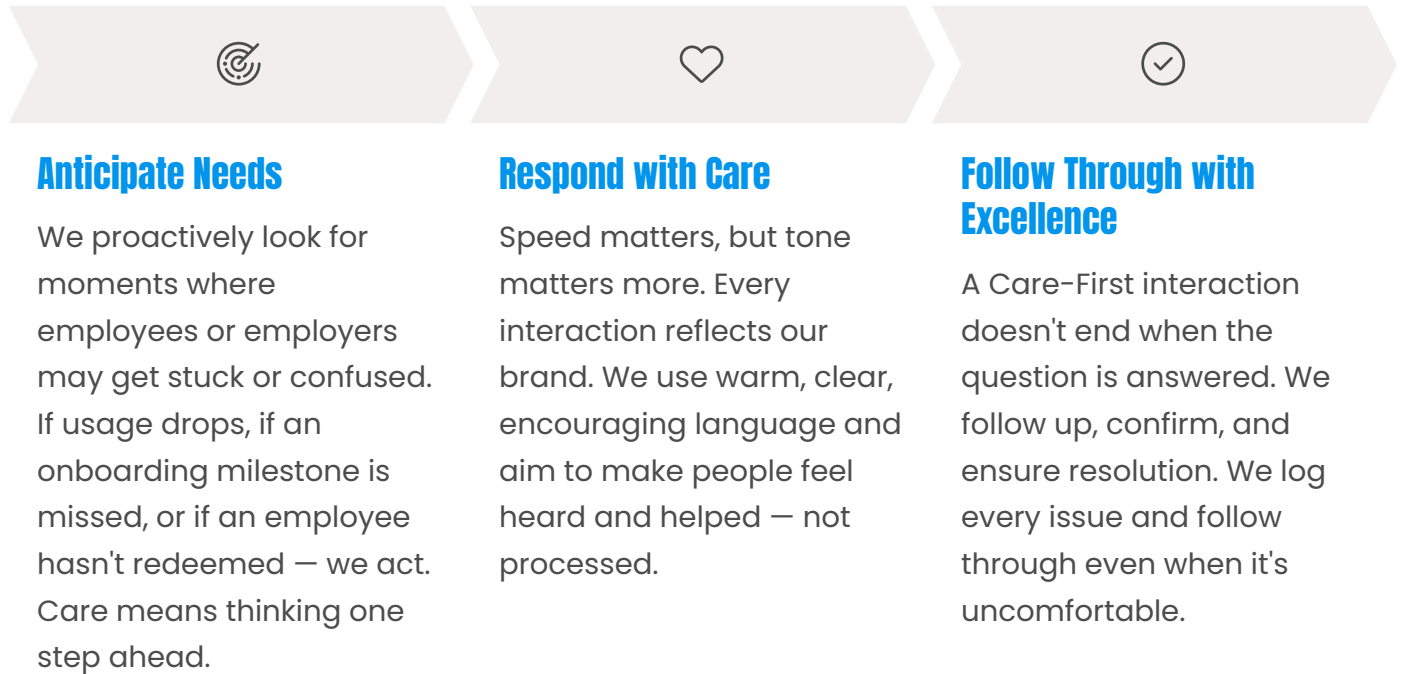
Days 11-15: Pulse & Optimization

- Review: % onboarded, % redeemed, early feedback
- Trigger first follow-up to Admin with summary + celebration language
- Begin storytelling prompts, testimonial asks, and case building

"Fufild isn't just a platform—it's a Care-First movement. We meet people where they are and build bridges to where they want to go—because Life Happens Now."

Execution – How We Deliver It Practically

We execute the Care-First model through structured systems, dedicated roles, and intentional support. It's not just about being kind — it's about designing experiences that honor people's lives while driving real, measurable outcomes.



Team Roles for Scale



Care Champion

Real-time support for users. They provide empathetic, clear, and fast help to employees on the platform.



Employer Success Partner

The bridge between Fufild and HR/Admins. They guide setup, monitor employer satisfaction, and drive high onboarding rates.



Insights Analyst

Monitors backend data to detect patterns and surface user behavior trends. Helps the team anticipate needs.

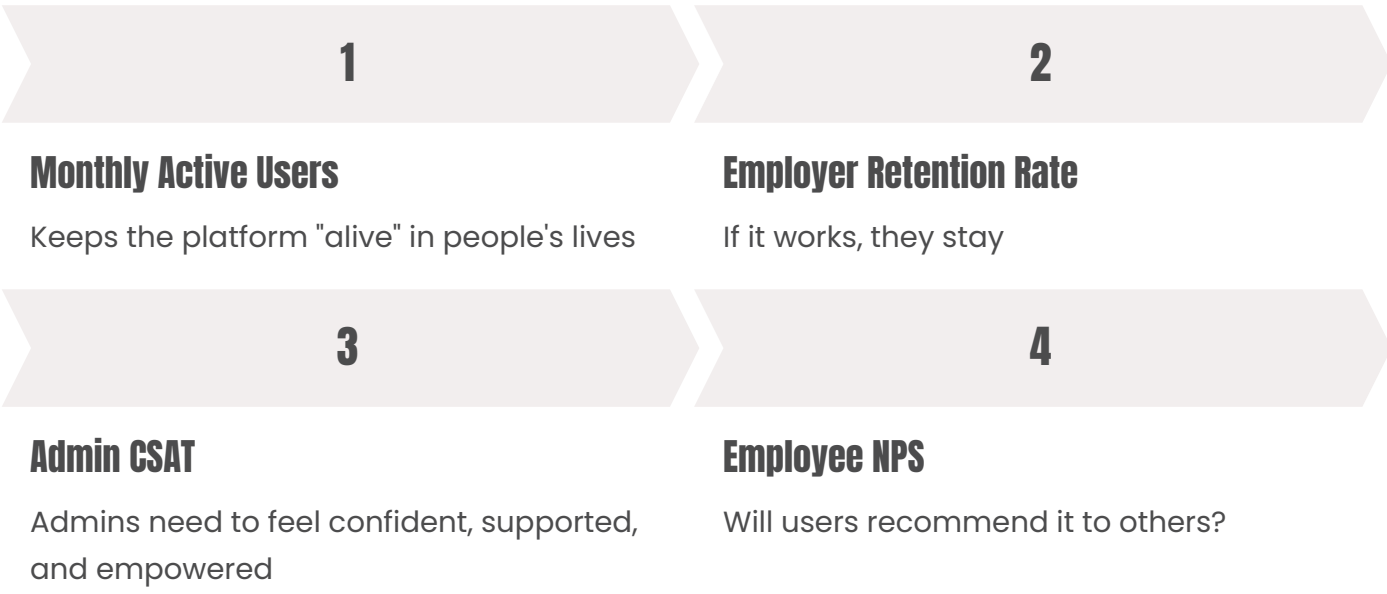


Fulfillment Curator

Ensures the app library is up to date, diverse, and aligned with user demand.

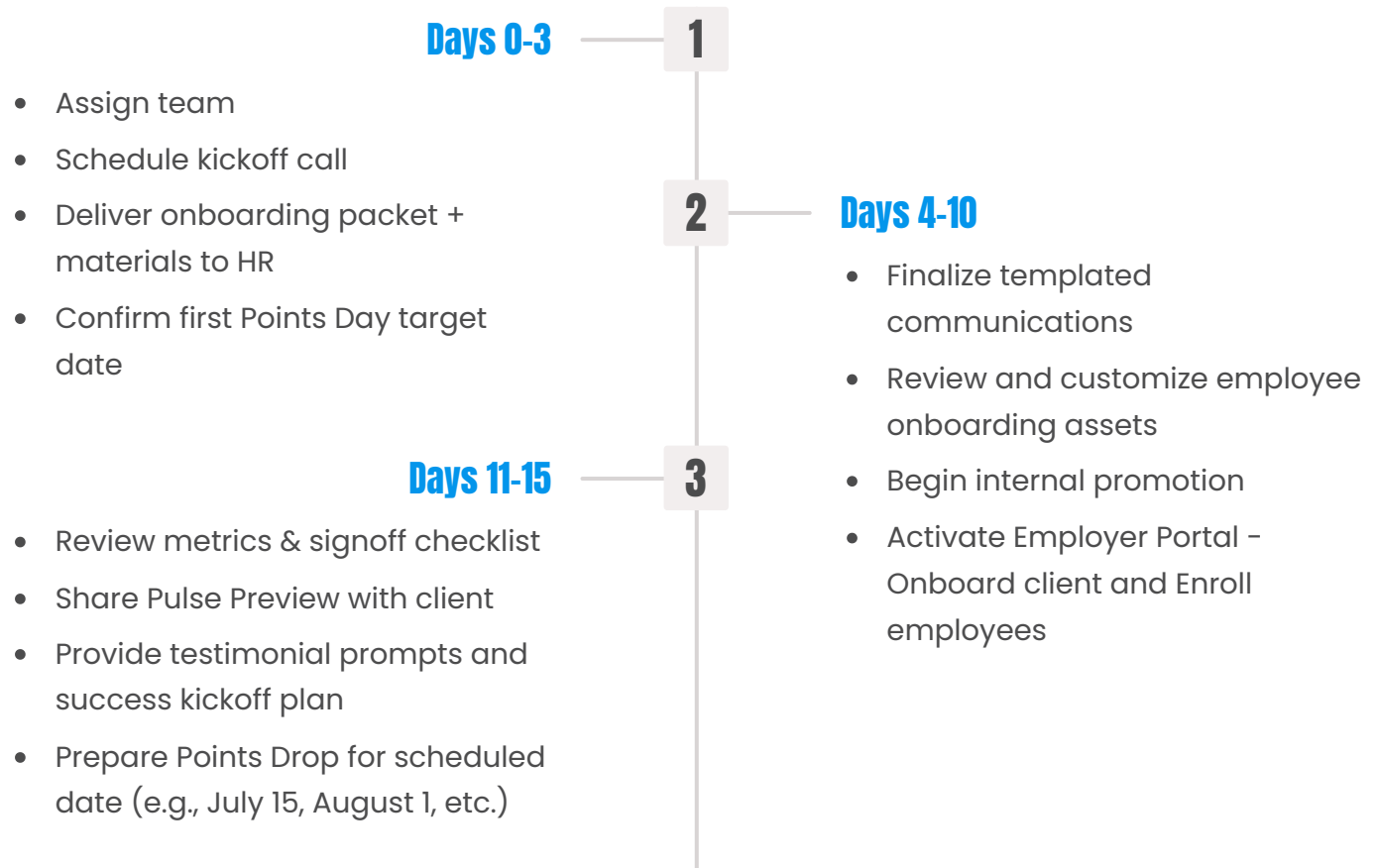
Metrics That Matter – How We Measure Care & Impact

Fufild tracks metrics that reflect real value: user engagement, retention, satisfaction, and employer outcomes.



Care-First Readiness Playbook – - From Contract to Launch Readiness

Fufild's goal is to have every client **fully ready to launch** within 15 days of contract signing – even if the first Points Day is scheduled further out. Here's our readiness playbook:



While Points may not be delivered within the first 15 days, all systems, training, materials, and communications are completed within that window. The employer chooses their first official Points Day based on their internal needs.

Dual Care Tracks – Employer and User Experience by Phase

Employer Track

- **Onboarding:** Assigned Success Partner, launch resources, kickoff call
- **Activation:** Engagement monitoring, message templates, check-ins
- **Ongoing Care:** Pulse reports, ROI data, success storytelling

User Track

- **Pre-Onboarding Emails:** Sent 7, 4, and 1 days out to build anticipation
- **Activation:** In-app nudges, easy redemptions, highlighted apps
- **Ongoing:** Monthly updates, fresh app features, surprise rewards, testimonial invites

Care-First Service Commitments – Six Principles in Practice

Have a Positive Attitude

We approach every interaction with optimism and ownership.

Know Your Product or Service

Our team receives regular training and shares real-life use cases.

Listen to Your Customer

Active listening is core to how we build trust and offer relevant solutions.

Maintain Communications

We update proactively — silence is never the answer.

Solve the Problem

No question or issue goes unresolved. We escalate, follow through, and resolve with care.

Always Follow Up

Within 24 hours of any resolution, we check in again — because lasting care requires closure.

Fufild Care-First Voice Guide

"Because how we say it is part of how we care."

At Fufild, our tone is part of our impact. Every message we send — whether it's a Points Day reminder or a support response — is a chance to reinforce trust, respect, and warmth. This guide helps every team member speak in the unified, compassionate, human-centered voice of the Care-First movement.

Core Voice Principles

Warm

Speak like a human who genuinely cares. Example: "We're so glad you're here."

Encouraging

Focus on possibility and growth. Example: "You're just getting started — and we're here to help."

Clear

No jargon. Simple. Understandable. Example: "Here's how it works in 3 quick steps..."

Empowering

Invite action and ownership. Example: "You get to choose what brings you joy."

Humble

We don't lecture. We serve. Example: "Thanks for your patience — let's fix this together."

Phrases to Use

- "We've got you."
- "Your time matters to us."
- "Here's what's happening — and what comes next."
- "Need a hand? We're here."
- "Let's figure this out together."
- "This is just the beginning — explore what brings you joy."

Phrases to Avoid (and What to Say Instead)

Avoid

"Your request has been received and will be processed in 3-5 days."

"You didn't complete your onboarding."

"Your redemption limit has exceeded the monthly allocation."

"That's not something we can help with."

Use Instead

"We got your message and we're on it. You'll hear from us shortly."

"Looks like onboarding is still in progress — let's walk through the next steps together."

"You've used all your points for the month — here's when they refresh."

"Let's see what we can do — and if we can't solve it directly, we'll help guide you."

Voice by Scenario

Onboarding Emails

Inspirational, warm, welcoming. Focus on life improvement.

Support Tickets

Human, calming, confident. Aim for fast clarity and resolution.

Redemption Questions

Friendly, informative, reassuring. "Let's walk through it."

Frustrated Users

Calm, validating, never defensive. "We hear you — let's make it right."

Employer Communications

Professional but personal. Emphasize partnership, support, and proactivity.

Internal Reminder: Every word we send represents the Care-First movement. It's not just tech support — it's **trust** support.

Fufild Care-First Escalation Protocol

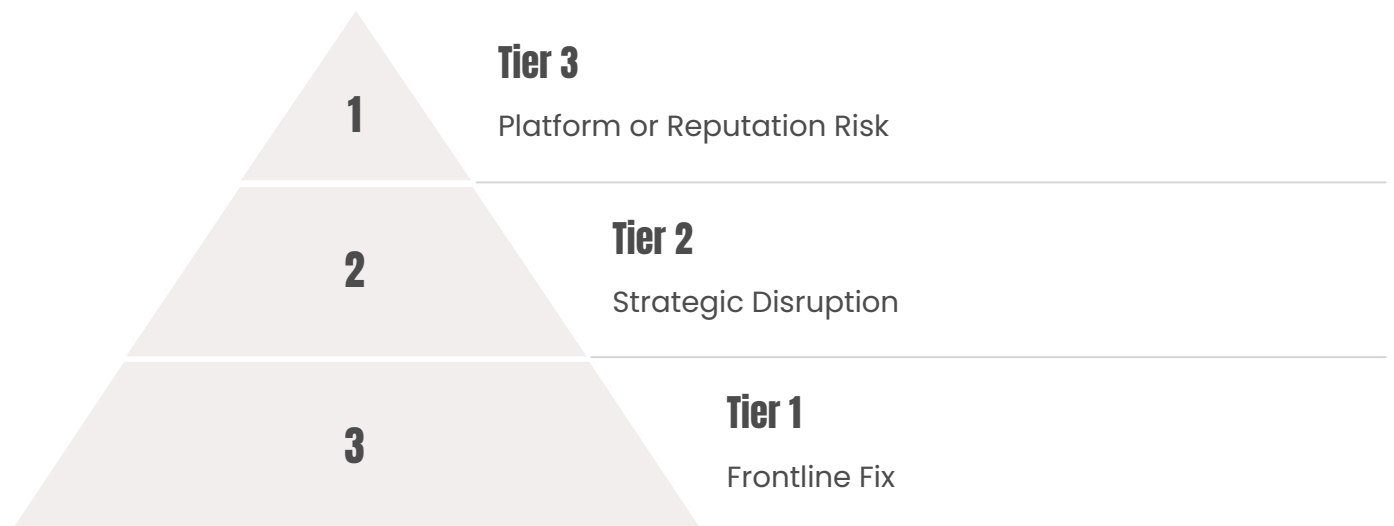
"Escalation isn't failure — it's structure for care."

Why This Matters

Even the most empowered team can't fix everything at every level. Escalation is how we ensure:

- Faster resolutions for serious issues
- Protection of relationships (especially with admins or power users)
- Consistency in how problems are prioritized and tracked

The 3 Escalation Levels



Tier 1 - Frontline Fix

- **Trigger:** Common, easy-to-resolve issues
- **Handled By:** Care Champion or Support Agent
- **Example:** User can't log in, can't find app, needs help redeeming

Tier 2 - Strategic Disruption

- **Trigger:** Affects onboarding, employer trust, or broader UX
- **Handled By:** Success Partner + Team Lead
- **Example:** Employer concern about engagement numbers, billing mistake, employee complaints

Tier 3 - Platform or Reputation Risk

- **Trigger:** Impacts systems, finances, or public trust
- **Handled By:** Leadership + Product + Engineering
- **Example:** Major service outage, data issue, legal complaint, PR incident

How to Escalate (Care-First Protocol)

Document the Context

- What happened
- Who's affected
- What was already tried

Escalate Internally in Your Channel

- Use your #care-escalations Slack thread or CRM workflow
- Tag correct role owner with urgency level (Tier 1/2/3)

Communicate With the User/Employer

- Be transparent: "We're elevating this to make sure it gets handled properly."
- Give a next step or time to expect a reply

Follow Up Until Resolved

- You own the follow-through, even if someone else solves it
- Log final resolution + flag lessons for the next retro

Red Flags That Always Trigger Escalation

- "We might lose this client over this."
- "They said they're telling their team not to use Fufild anymore."
- "This issue keeps happening to multiple users."
- "We made a billing or privacy mistake."
- "The response we gave made them more upset."

Escalation Response SLAs (Internal)

Tier	Acknowledge	Owner Assigned	Resolved By
Tier 1	Within 1 hour	Immediately	Within 24 hours
Tier 2	Within 2 hours	Same day	Within 48–72 hours
Tier 3	Immediately	Within 30 mins	Active ongoing management by exec team

Closure Checklist

Before you close any escalated case:



Resolution is confirmed

Ensure the issue has been fully addressed and the solution works.



User/Admin has responded or been followed up with

Verify that the affected parties know the issue is resolved.



Internal notes are logged in the system

Document what happened and how it was resolved for future reference.



Team knows if something needs fixing upstream

Flag if clearer instructions, UI changes, or other improvements are needed.

Fufild Care-First Journey Maps

Journey maps help visualize the emotional and logistical path our users and employers take. They allow us to spot gaps, optimize moments of impact, and deliver Care-First support at every stage of the experience.

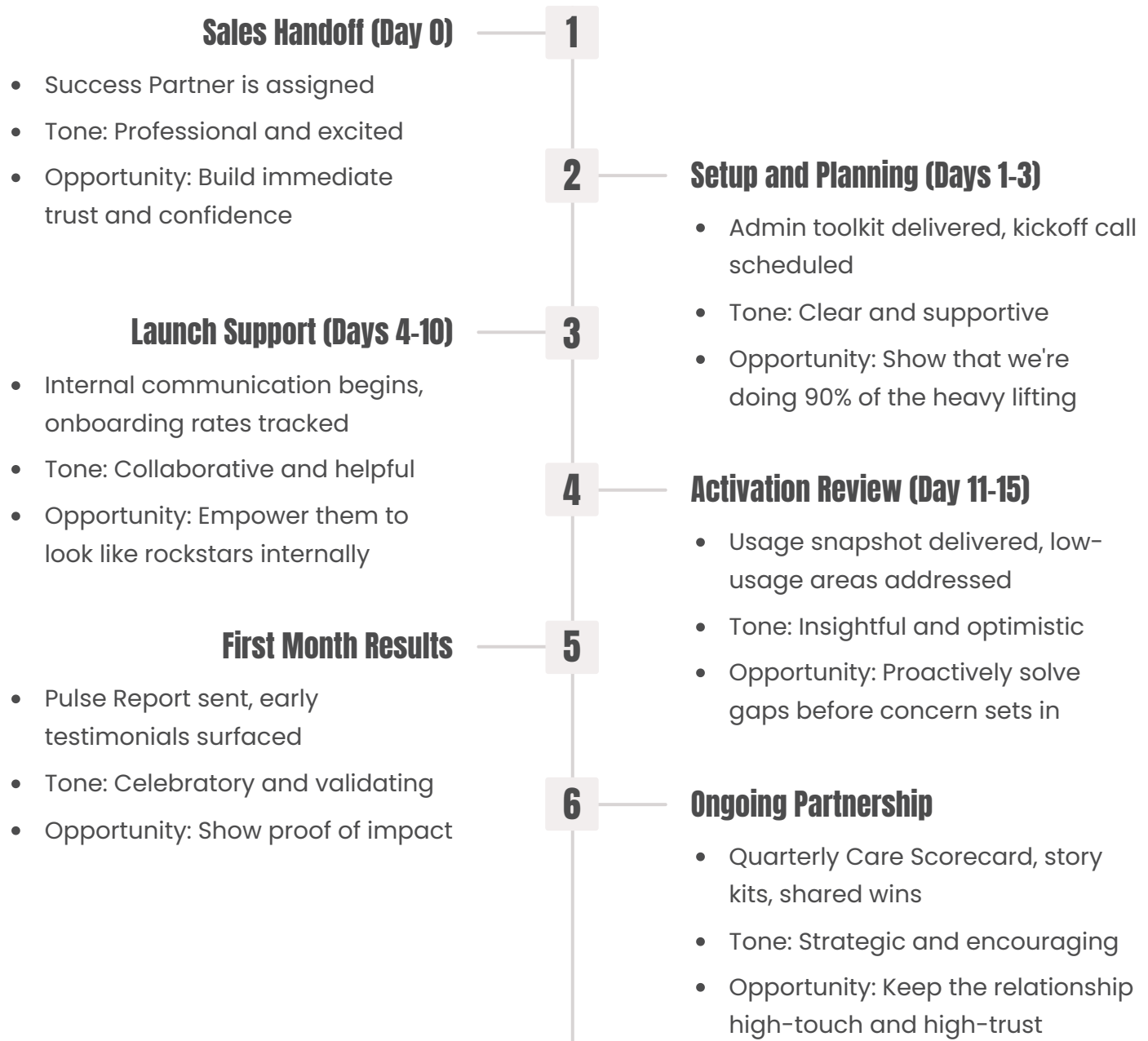
Employee Journey Map: "The Fulfillment Path"

Employee Journey Stages



Employer Journey Map: "From Handoff to Hero"

Employer Journey Stages



Fufild Care-First Feedback & Continuous Improvement System

At Fufild, feedback isn't a formality — it's fuel. Our ability to grow, adapt, and deliver care at scale depends on intentional systems that gather, evaluate, and act on the voices of our users and employers.

Feedback Sources

We gather feedback across multiple channels to capture real, in-the-moment insights:

- Post-onboarding surveys (employee + employer)
- Monthly in-app feedback prompts (2–3 clicks max)
- Quarterly employer satisfaction form
- Employer Success Partner check-ins
- Support ticket sentiment tagging
- Story/testimonial submissions (used for qualitative insights)

How Feedback Is Handled

Collection

Feedback is logged in a central database (linked to user or employer account).

Categorization

Each submission is tagged by theme: onboarding, usage, app issue, suggestion, emotional reaction, etc.

Review

The Care team reviews weekly. High-impact or repeated feedback is routed to:

- Product (for fixes or improvements)
- Employer Success (for comms, re-engagement, or admin follow-up)
- Leadership (for system-wide changes or recognition)

Responsiveness & Closure

- Every feedback response receives an acknowledgment.
- If it led to a change, we follow up directly with: "Thanks to your feedback, we..."
- We log follow-ups in our CRM so the loop truly closes.
- Positive comments are shared in our internal Care Wins channel weekly.

Quarterly Feedback Report

Every quarter, we compile a visual summary of trends:

Top 3 praise points from users

Highlighting what users love most about the platform.

Top 3 friction themes

Identifying common pain points or areas for improvement.

Actions taken

Feature updates, new apps, new policies implemented based on feedback.

Top employer shout-outs

Recognition for employers who are implementing Fufild effectively.

"Before/After" case examples

Showcasing strong implementations and their results.

Feedback isn't a one-time survey — it's an ongoing relationship. The more we listen, the better we serve. The better we serve, the more trust we earn. And trust is the foundation of the Care-First movement.

Fufild Care-First Crisis Care Playbook

Even the most thoughtful systems encounter friction. When something breaks, feelings get hurt, or expectations aren't met, our Care-First response isn't just about fixing the issue — it's about restoring trust. This playbook ensures we respond with clarity, compassion, and confidence in moments that matter most.

What Counts as a "Crisis"?

- A user or employer threatens to leave
- A major feature fails during a key rollout (e.g., Points Day)
- Multiple employees report confusion or dissatisfaction simultaneously
- A billing or privacy error occurs
- An interaction escalates to anger, distrust, or public complaint

Response Principles

Respond quickly

Silence increases anxiety.

Own the issue

No blame-shifting or hiding.

Use empathy first, then action

Acknowledge feelings before solving problems.

Be human

Ditch the script.

Reassure clearly and honestly

Build trust through transparency.

Always follow up

Until the issue is fully resolved.

Crisis Response Template

Step 1: Acknowledge

"I hear how frustrating this must be — thank you for letting us know. We take this seriously."

Step 2: Own

"We're already reviewing what went wrong and what needs to be fixed."

Step 3: Reassure

"This shouldn't have happened. Our team is working on it now — we'll follow up by [insert time or day]."

Step 4: Follow Through

Confirm the fix, offer a resolution (bonus points, clarification, call), and always close the loop.

Step 5: Debrief Internally

Log the issue. If it was preventable, propose a system fix or new guardrail.

Goodwill Gestures (When Warranted)



Bonus Points

500 bonus points



Direct Call

From Success Partner or Care Lead



Early Access

To new feature or service



Personalized Thank-You

Card or email



Feature Story

In next team update or user spotlight

System Guardrails

- Double-check all Points Day timing and message templates before launch
- Use clear visual guides in onboarding to prevent missed steps
- Test redemption links and app functionality regularly
- Use analytics to flag abnormal activity spikes or drop-offs early
- Ensure backup escalation contacts are active during key moments

Fufild Care-First Scorecard & Quality Assurance System

The Care-First Scorecard is designed to help team leads and peers assess how well Care Champions, Success Partners, and all customer-facing team members embody the Care-First philosophy in every interaction. This tool tracks consistency, empathy, problem-solving, and follow-through to ensure quality care at scale.

Scoring Categories (Each rated 1-5)

Tone & Warmth

Was the message human, encouraging, and clear?

Care-First Creativity

Was there evidence of going above expectations or thoughtful personalization?

Efficiency

Was the issue handled within expected response timelines?



Empathy & Validation

Did the responder acknowledge emotion or confusion?

Accuracy

Was the information correct and appropriate to the issue?

Resolution

Did the reply solve the issue fully or take it forward meaningfully?

Follow-Up

Was the loop closed clearly, or a next step given?

Monthly Scorecard Template

Team Member:	_____
Reviewer:	_____
Date:	_____
Case Reviewed:	_____
Tone & Warmth:	_____ / 5
Empathy & Validation:	_____ / 5
Accuracy:	_____ / 5
Resolution:	_____ / 5
Follow-Up:	_____ / 5
Efficiency:	_____ / 5
Care-First Creativity:	_____ / 5
Total Score:	_____ / 35

Comments & Coaching Notes:

Team Targets & Use

- All frontline team members should average 30+/35 across reviewed cases each month
- Use as both a coaching tool and celebration tracker
- Highlight high scores in team huddles (e.g., "Care Touch of the Week")
- Review 2–3 cases per team member monthly
- Use low scores as a chance for 1:1 development, not discipline

Tips for Reviewers

Review with context

Understand what the user/employer was feeling

Be generous with praise

Call out creative wins and thoughtful care

Focus on growth

Not just scores

Remember the goal

This is about trust and consistency, not perfection

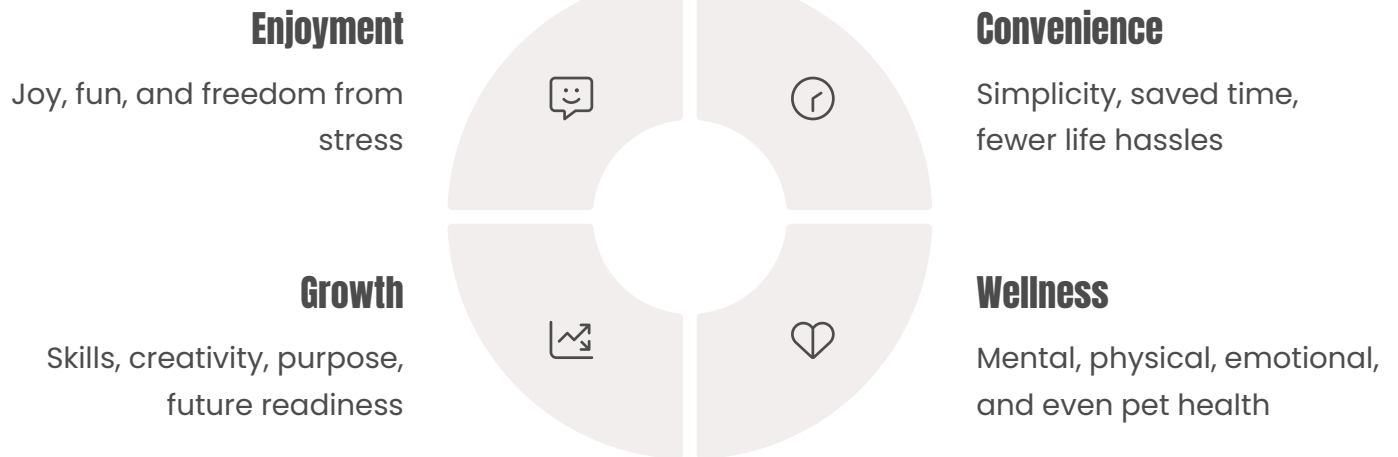
Fufild Care-First Team Onboarding Module

Welcome to Fufild's Care-First Team. This onboarding module introduces our mission, mindset, and method for serving both employers and employees with heart, speed, and excellence. Everything we do begins and ends with care.

Our Mission: Life Happens Now

Fufild exists to empower underserved employees — especially hourly and low-salaried workers — through PersonalFulfillment-as-a-Service™. We help people discover joy, health, convenience, and growth outside of work — because when life gets better, work does too.

The 4 Fulfillment Categories



What You Represent

Every message you send, every case you handle, and every follow-up you close represents the Fufild movement. You are not just support — you are a builder of trust, loyalty, and care culture.

Care-First Scenario Practice

SCENARIO 1: User says: "I never got my points!"

Bad Response:

| "Check the app."

Care-First Response:

| "Thanks for letting us know — let's make this right. I'm checking your account now and will follow up within the hour."

SCENARIO 2: Employer asks: "Why aren't more people using this?"

Bad Response:

| "They probably didn't read your emails."

Care-First Response:

| "Let's look at engagement together. We can also send out a reminder from our side to help boost visibility."

Voice & Tone Refresher

- Always warm, never robotic.
- Simple is smart. Avoid jargon.
- Encourage and uplift — even when solving a problem.
- Say: "Let's figure this out together."
- Don't say: "That's not our responsibility."

Reflection Questions

(for team discussion or journaling)

Personal Meaning

What does Care-First mean to you personally?

Customer Experience

When was the last time you felt genuinely cared for as a customer?

Trust Building

What kind of tone or response builds trust in tough moments?

Going Beyond

What could you do this month to go above and beyond for someone?

Fufild Care-First Monthly Operations Checklist

This checklist outlines core monthly tasks to ensure consistent care delivery, partner satisfaction, and internal team alignment. It provides a rhythm for recurring processes related to onboarding, support, reporting, feedback, and celebration.

Weekly Tasks (Every Week)

- Monitor Points Day performance and support inbox
- Review new support tickets for empathy, closure, and tone
- Share one Care Win in internal team channel
- Run weekly engagement snapshot (log redemption, top categories)
- Nudge low-activity employers if employee use drops below 40%
- Ensure all unresolved Tier 2+ issues are updated and followed up

AT A GLANCE

Week 1 - Onboarding & New Launches

- Assign Employer Success Partner to new clients
- Schedule kickoff calls for all launches that week
- Set up Points Day reminders and launch comms for new users
- Prepare customized activation materials (flyers, emails, QR templates)

Week 2 - Feedback & Review

- Send in-app or email feedback prompts to active users
- Distribute 1-click satisfaction check-in to all employers
- Run internal Care Scorecard reviews for at least 2 team members
- Add user feedback to Insights Sheet for review

Week 3 - Engagement Boost & Content

- Post Monthly Highlights Email (top apps, stories, testimonials)
- Review app usage trends across all categories
- Offer one Care-First "Surprise & Delight" bonus (extra points, shout-out, etc.)
- Update FAQ or onboarding material if major trends arise

Week 4 - Reporting & Celebration

- Generate Employer Pulse Reports
- Share story/testimonial spotlights with employer contacts
- Compile internal monthly care metrics (response time, NPS, story count)
- Highlight top performers (Care Champion, Team Win, Best Follow-Up)
- Hold 15-minute Care Team Huddle or async check-in

Fufild Monthly Employer Impact Dashboard (Template)

This dashboard provides a clear, at-a-glance snapshot of how your team is engaging with Fufild. It highlights activation, engagement, and culture wins — helping you visualize ROI and track team sentiment over time.

Core Metrics This Month

- % of Employees Onboarded: _____
- % of Employees with Active Subscriptions: _____
- Points Redemption Rate: _____
- Repeat Usage Rate: _____
- Most Popular Category (Enjoyment / Wellness / Convenience / Growth):

Highlights & Stories

- Featured Employee Quote:
" _____ "
- Top Used App: _____
- Surprise & Delight Moment (if any): _____

Insights & Recommendations

- Engagement appears strong in _____. Consider promoting category _____ next month.
- Consider sending an internal message around [Points Day / New App Feature / Story Submission Contest].
- We recommend a check-in call in [Month] to review quarterly trends and upcoming tools.

What's Coming Up Next

- Pulse Report Date: _____
- Potential New Features or Services Being Added:
 - _____
 - _____
- Care Team Contact: _____

Fufild Reporting & Messaging SOP: This Standard Operating Procedure (SOP) outlines how to manage recurring reports and communications across the Fufild Care-First system. It ensures timely, consistent, and valuable touchpoints for both users and employers.

Weekly Messaging Tasks

- Send Points Day reminders to all active users
- Nudge low-engagement employers with encouragement + spotlight features
- Post one internal Care Win (quote, redemption stat, or shoutout)
- Follow up on unresolved support cases > 3 days old

Monthly Employer Reporting

Prepare and send the Monthly Employer Impact Dashboard:

- Include core usage stats (% onboarded, active, redeemed)
- Highlight most-used app and featured story or quote
- Offer 1–2 tailored recommendations
- Send by the 5th business day of each month

Quarterly Review Preparation

- Schedule check-in call with employer
- Compile trends from past 3 Monthly Dashboards
- Review Care Scorecard, NPS shifts, and category usage
- Suggest next-step strategy based on goals and data

Internal Messaging & Celebration

- Share weekly Care Highlights in team channel
- Celebrate top Care Scorecard performance monthly
- Recognize top-performing employer partners quarterly
- Track all messaging and reports in shared Notion/HubSpot log

Ownership & Calendar Notes

- Points Day comms: Care Champion (weekly)
- Employer Dashboard: Employer Success Partner (monthly)
- Quarterly Reviews: Care Lead or Team Director
- All items tracked in centralized ops calendar (Notion, shared sheet, or CRM task queue)

Fufild Role-Based Daily Checklists

To maintain consistency and care across all client and user interactions, each role within the Care-First team has a tailored daily checklist. These responsibilities align with our core values of empathy, excellence, and proactive engagement.

Care Champion - Daily Checklist

- Review all new support tickets (reply within 1 hour)
- Resolve or escalate any open tickets from past 48 hours
- Follow up on previous user resolutions (Tier 1s especially)
- Track user complaints/issues by category (joy, wellness, etc.)
- Submit one Care Win to internal team thread
- Review Points Day reminders & engagement nudges

Employer Success Partner - Daily Checklist

- Review employer check-in schedule
- Track engagement metrics for assigned employers (% onboarded, % redeeming)
- Flag and follow up with employers below engagement thresholds (<50%)
- Respond to any admin inquiries within 1 business day
- Note potential testimonials or story candidates
- Log actions taken in shared CRM or Notion system

Insights Analyst - Daily Checklist

- Run daily engagement stats (MAU, redemptions, trends)
- Identify usage drop-offs or outliers
- Share insights with Care and Product team weekly
- Archive relevant metrics into monthly Pulse Report folder
- Flag new opportunities (high-performing apps or unexplored categories)

Care Lead / Manager - Daily Checklist

- Check in with Care Champions & Employer Partners
- Review active escalations and resolve roadblocks
- Spot-check 1–2 recent interactions for tone & closure
- Prep recognition for top performers or story highlights
- Track overall NPS movement, CSAT, and recurring friction themes
- Ensure Pulse Reports and Dashboards are on schedule