**PulseBox Offerings**

1. ***Option 1:* PulseBox *Lite***

-For flat organizations (one leader and all others one level below)

-No breakdown by department

-No need for company to provide any details on employees

-Only predefined questions (no custom)

Steps

1. Have meeting with company rep/execs and get following info from meeting

-company name/desc, parent company info if applicable

-industry(s) name/desc

-company location (addr, city, county, state, zip, country)

-total employees

-company contact info (name, title, dept, manager, email, phone #)

1. Close sale/sign lite agreement
2. Insert industry info from above into industry table
3. Insert location info from above into location table
4. Insert company contact info from above into employee table
5. Insert company info from above into company table
6. Create generic userids for company based on total employees (load & use temp\_user\_id table)
7. Send url to company representative and have them choose from a pool of userids
8. Once an employee chooses a userid he/she can choose to customize it (create their own userid alias)
9. Update userid/alias, password info in employee table for userids chosen by employees
10. Allow employees to enter pulse data 24X7X365 and provide management reports from this data with insight into the pulse of their organization!
11. Company representative needs to remind users to login via generic userids or aliases they have chosen in line above
12. Communicate to company that lite version has limitations such as potential ongoing userid usage after employment termination
13. Create a set of reports on usage/possible fraud that can alleviate some issues
14. Possible ideas for reducing fraud – reload accounts monthly, remove accounts that come from certain IPs, etc, company needs to be aware of reporting accuracy limitations due to it being the lite version.

Agreement:

-DTM Data is sole owner of the data (except law enforcement)

-Lite version has fewer bells and whistles like reporting, features, etc

-No linkage between employee and department available in the lite version

-Full anonymity (CEO not aware of which employee is tied to which ID and vice versa)

-Other data related to employee may be collected

-Misuse of IDs possible which may skew data

1. **Option 2: PulseBox Premium**

-For the entire company or specific departments

-Full reporting breakdown by departments is included

-Company must provide more details on employees via text file

-Company must also provide updates to employee info via regular text file (daily, weekly, monthly, quarterly, or yearly)

Steps

1. Have meeting with company rep/execs and get following info from meeting

-company name/desc, parent company info if applicable

-industry(s) name/desc

-company location (addr, city, county, state, zip, country)

-total employees

-company contact info (name, title, dept, manager, email, phone #)

1. Provide details about data feed needed to company representative – these are the minimum required fields:

**(company name, employee first name, employee middle name, employee last name, gender, employee email, employee department, employee location, employee manager, employee manager email)**

& how to transfer data to us. First line of file should be #BEGIN and last line should be #END. File name format: **company\_name\_20141028\_hh24miss.txt**. Name of company must match company name field #1 of text file above.

1. Close deal/sign full agreement with company & employee
2. Load initial employee data from the feed provided by company into temporary staging table (temp\_company\_info table).
3. Create generic userid for each employee and email to employee directly
4. Users login via generic userids provided going forward. Allow employee to create alias for userid.
5. Update alias, password info in employee table
6. Update table data as necessary (load once update many approach) to get employee data correct in our tables
7. Create management reports
8. Allow employees to enter pulse data 24X7X365 and provide management reports from this data with insight into the pulse of their organization including department breakdowns and industry comparisons!
9. Any issues with userids will be resolved between employee and DTM Data. No company involvement needed or allowed
10. Receive regular ongoing feed from company on employee changes and update PulseBox with it
11. Send periodic emails to key people in the company about PulseBox usage, tip of the day, etc.

Agreement:

-DTM Data is sole owner of the data (except law enforcement)

-Full version has all bells and whistles like departmental reporting, industry comparisons, privilege-based features, etc

-Full linkage between employee and department in premium version

-Full anonymity (CEO not ware of which employee is tied to which userid/alias and vice versa)

-Other data related to employee may be collected for product enhancement

-Some misuse of userids/aliases possible (mainly employees sharing accounts)