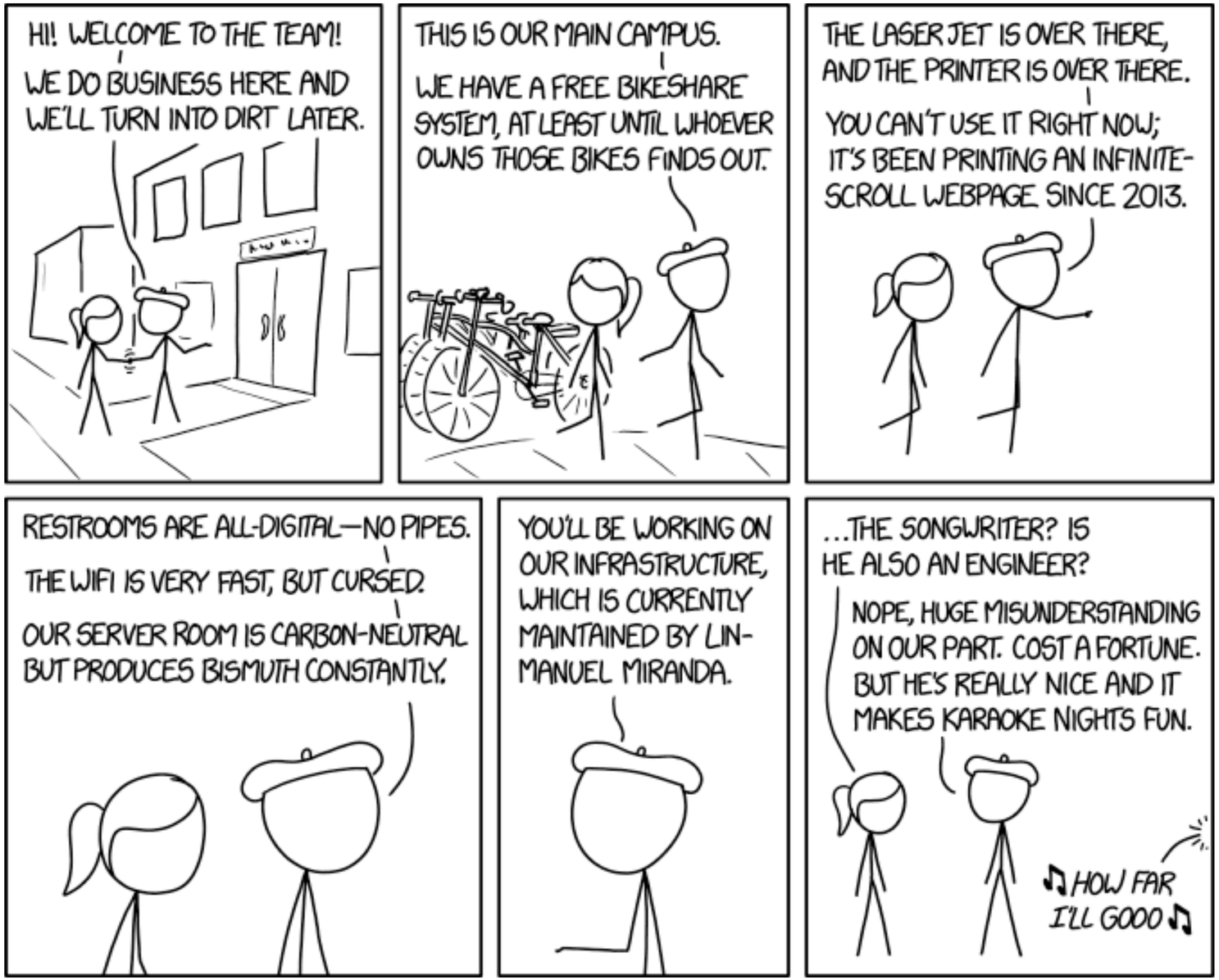
Culture Amp

Onboarding in a Culture First Environment

James Smith

Onboarding



https://xkcd.com/1812/

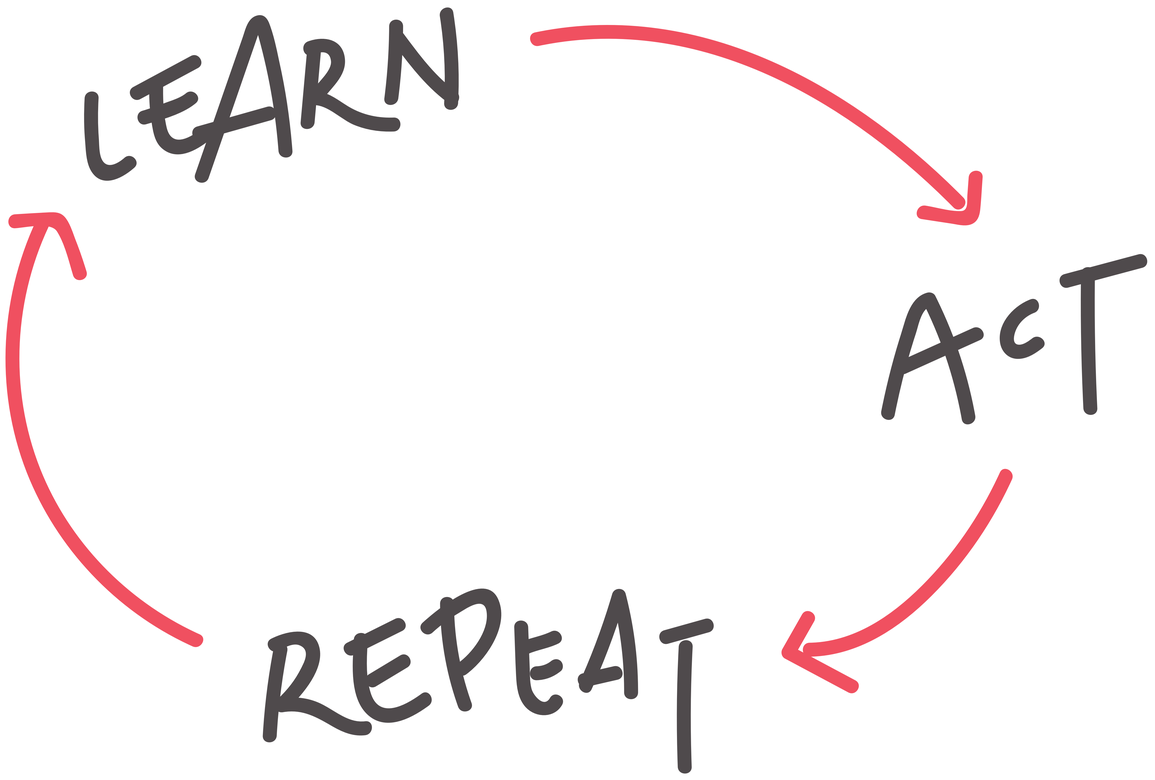
whoami

Slack & Twitter:

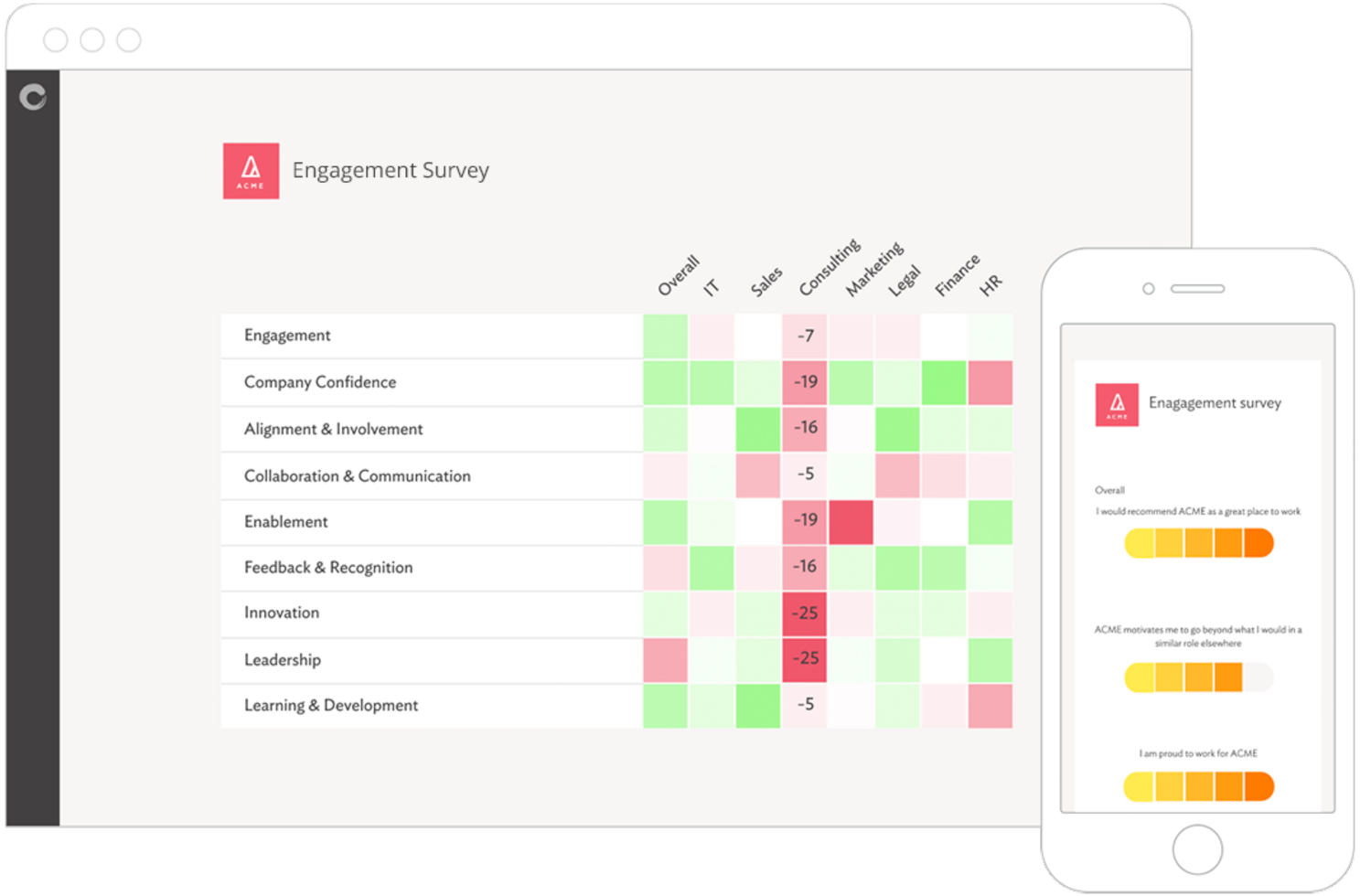
@smithjw

IT Administrator

Enable CAmpers through technology to do their best work.



Who are we?


Engagement Survey
Overall
IT
Sales
Consulting
Marketing
Legal
Finance
HR
Engagement -7
Company Confidence -19
Alignment & Involvement -16
Collaboration & Communication -5
Enablement -19
Feedback & Recognition -16
Innovation -25
Leadership -25
Learning & Development -5
Enagagement survey
Overall
I would recommend ACME as a great place to work
ACME motivates me to go beyond what I would in a similar role elsewhere
I am proud to work for ACME

Who are we?

Where did we start?

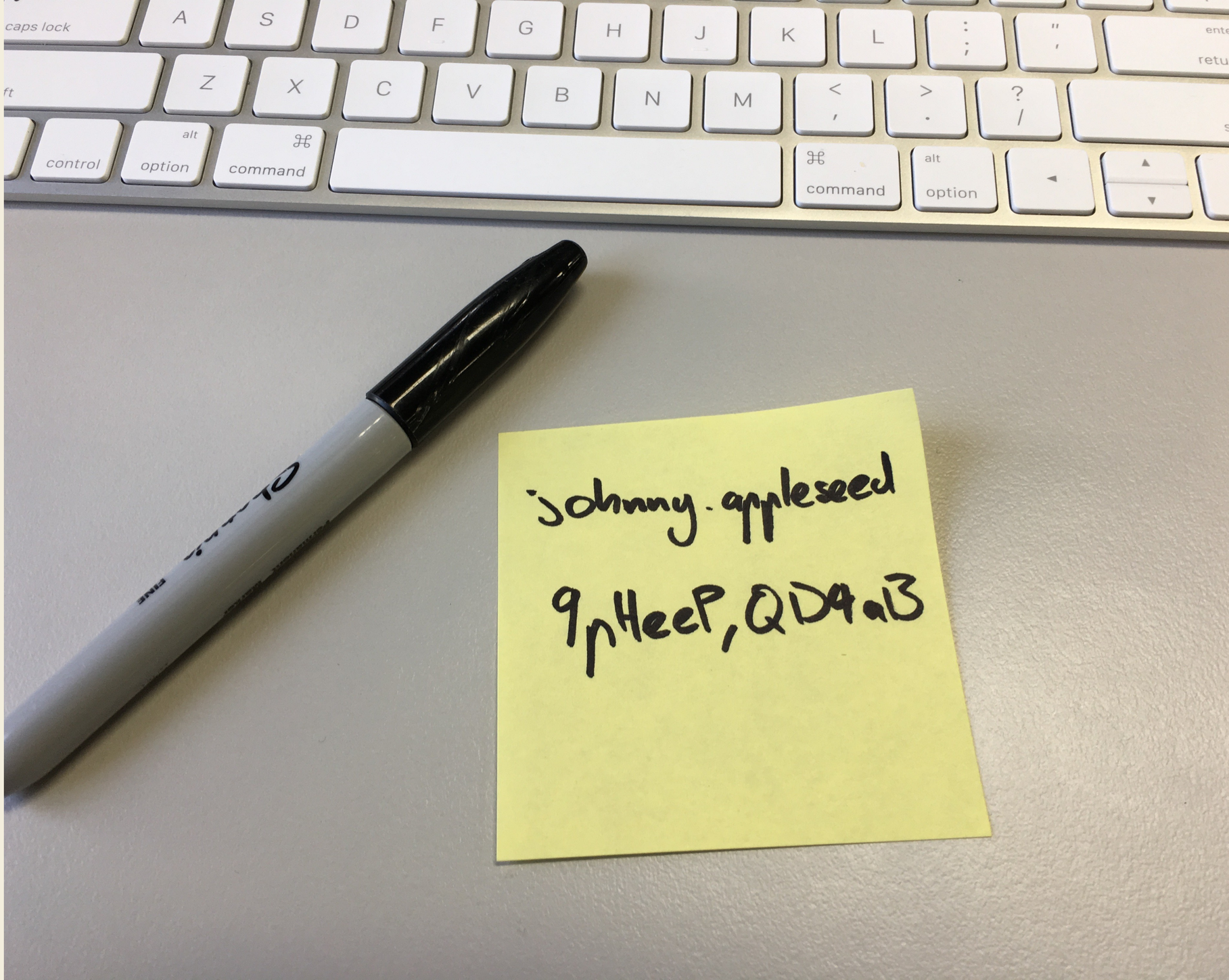
Day 1

HiRise for MacBook
adjustable stand for MacBook / support réglable pour MacBook
Logitech
MXMASTER
WIRELESS MOUSE | SOURIS SANS FIL
Logitech
MXMASTER
WIRELESS MOUSE | SOURIS SANS FIL
GEAR
johnny
MacBook Pro
PEOPLE GEEK
REUSABLE
BREW
GLASS COFFEE CUP

Setup Assistant

Culture Amp

Password communication



Password communication

SaaS Services

How did we improve this?

A better account setup method

Culture Amp

Where are we now?

Day 1

HiRise for MacBook
adjustable stand for MacBook / support réglable pour MacBook
Logitech
MXMASTER
WIRELESS MOUSE | SOURIS SANS FIL
johnny
MacBook Pro
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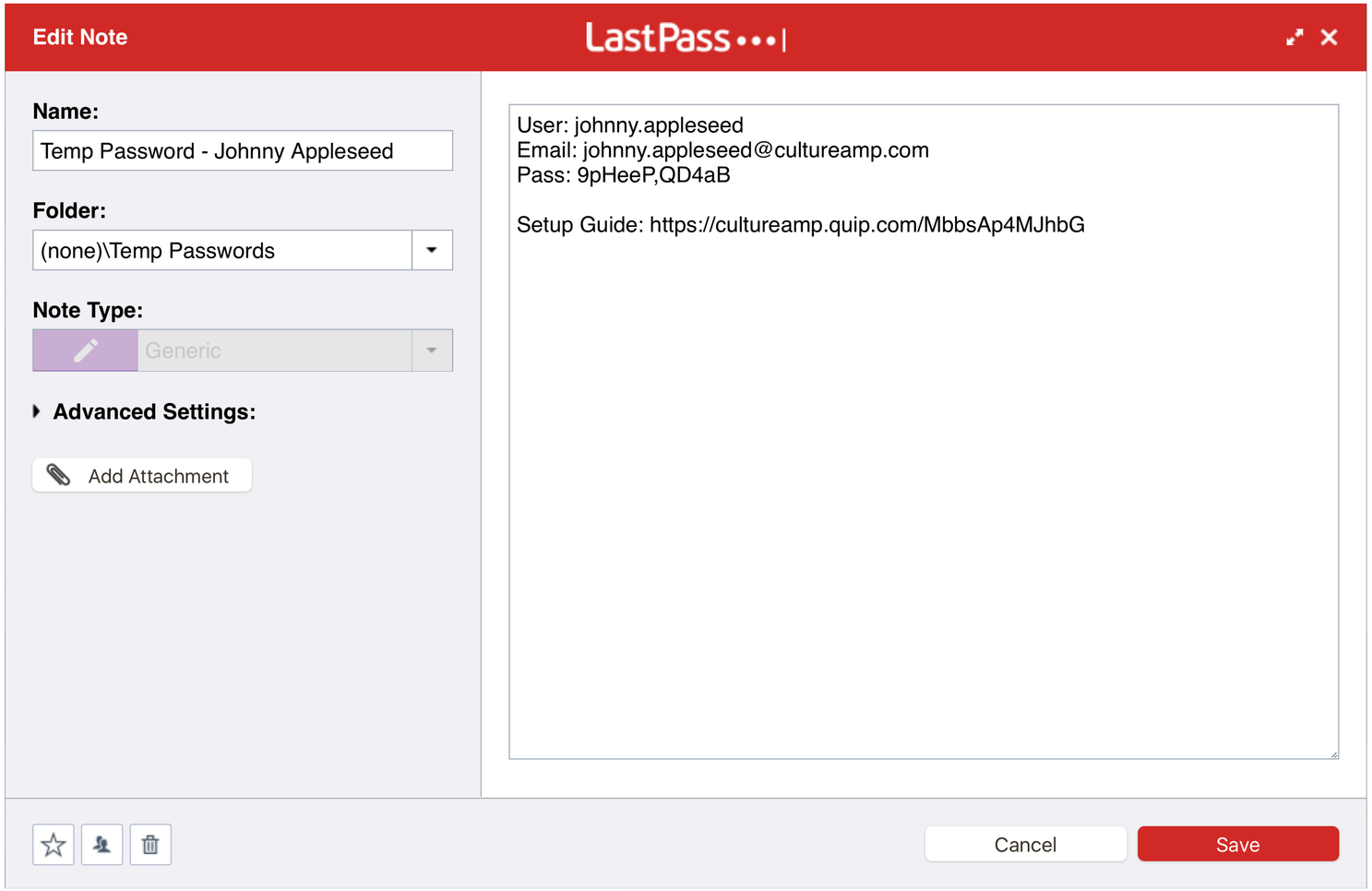
Password Communication



Setup guide

Culture Amp > Team Technology > Guides > Steps for setting up your new Mac

Document | Share 113 | Search

Steps for setting up your new Mac

Setting up Okta

TEAM LEAD/MANAGER/HR

1. Grab new CAmper's Okta credentials from the shared LastPass item. This will be named: **CAmper Name - Temp**
2. Open up an Private/Incognito Window in Safari or Chrome (File>New Private/Incognito Window)
3. Navigate to https://cultureamp.okta.com
4. Enter in the new CAmper's credentials (Username/Password from the LastPass Shared Item) and click **Sign In**
5. Hand your Mac over to the new CAmper and let them proceed with the Okta setup.

NEW CAMPER

1. Setup your Multifactor Authentication for your account following the prompts on the Okta page
    a. The Technology team recommends Okta Verify as it will send a Push Notification to your phone that you accept rather than having type out a six-digit code generated in an app such as Google Authenticator.
2. Re-enter the temporary password and select a new password (Make sure it's memorable as you'll need it to setup your new Mac)
3. Pick a security question & answer
4. Pick a security image
5. Your Okta account is now setup!

Setting up your new Mac

> *If you're using a personal Mac while a Culture Amp Mac is on order, please ignore these steps and click here*

All Macs purchased by Culture Amp are now being managed via JAMF (more on JAMF here) and enrolment occurs via

Culture Amp

Setup guide

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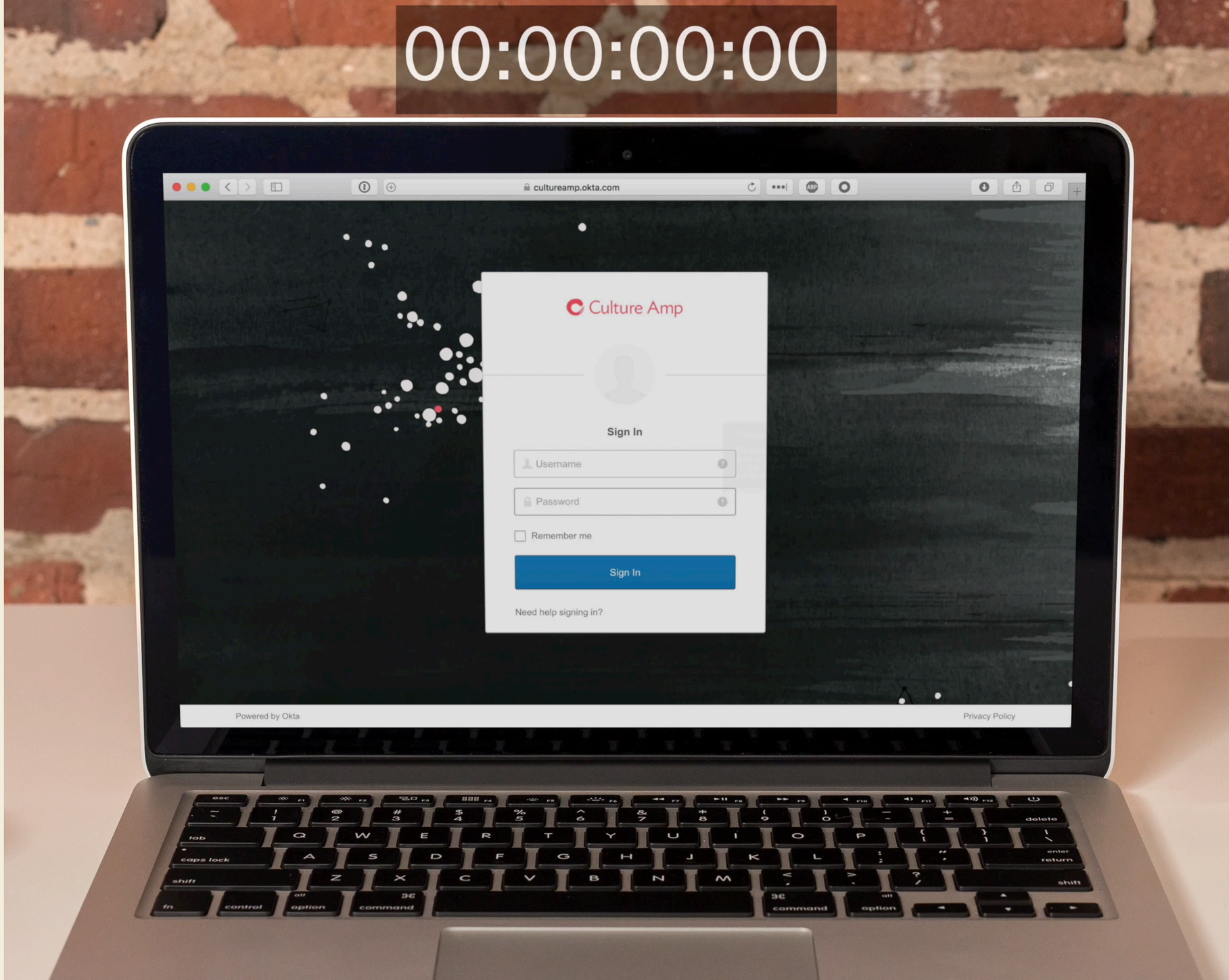
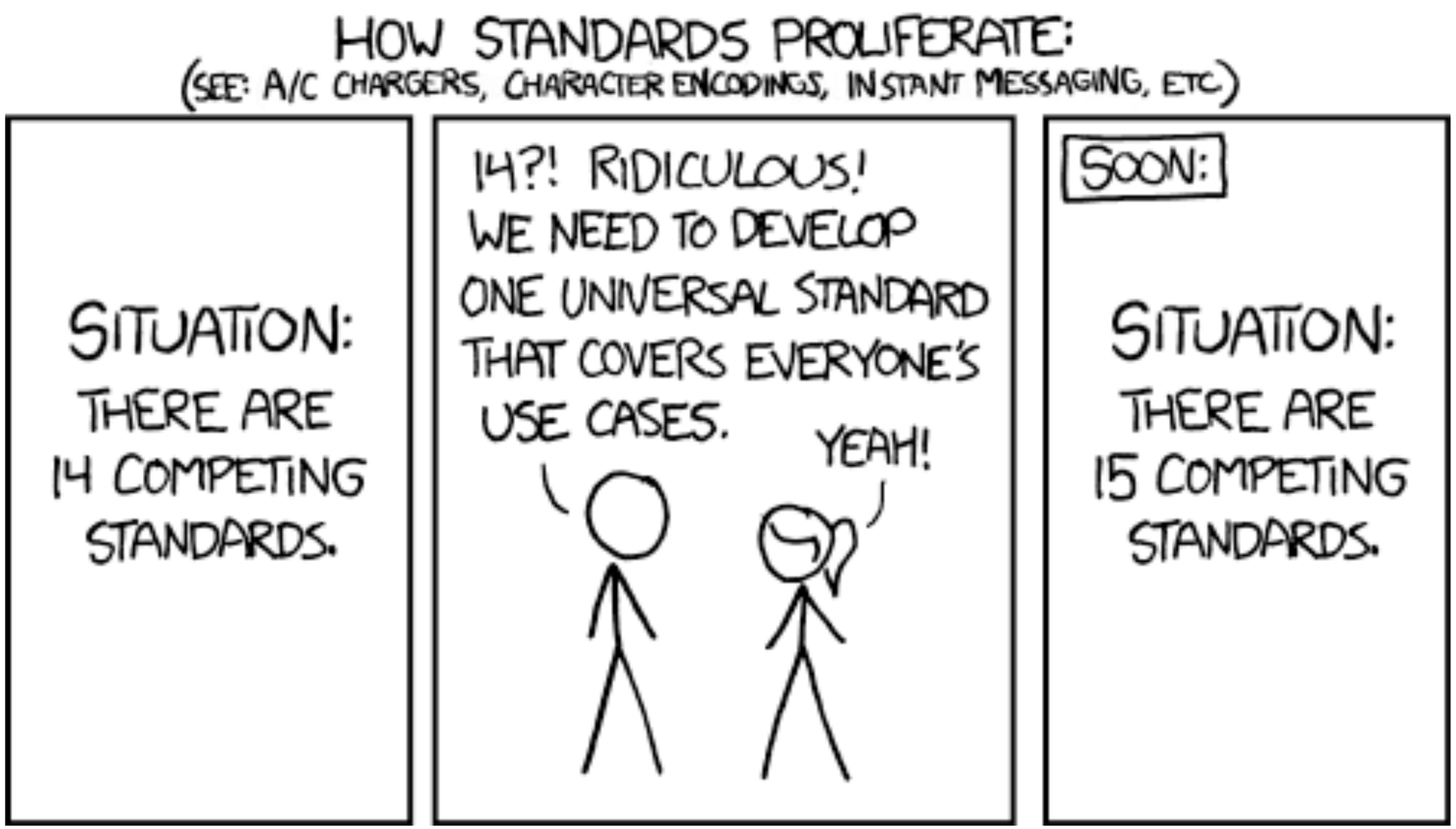
SaaS services



Setup assistant

How did we get here?

Standards



https://xkcd.com/927/

Email formatting

Pick a standard and stick with it

Email name conventions we've used:

- First name @ (james@cultureamp.com)
- First name + first initial of last name @ (jamess@cultureamp.com)
- Nickname @ (smithy@cultureamp.com)
- Initials @ (jwhs@cultureamp.com)
- First name + last name @ (jamessmith@cultureamp.com)
- First name . last name @ (james.smith@cultureamp.com)

Email formatting

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- Initials @ (jwhs@cultureamp.com)
- First name + last name @ (jamessmith@cultureamp.com)
- **First name . last name @ (james.smith@cultureamp.com)**

Departments/ Teams/Groups

Groups have existed in various forms across different services:

- Agro
- Agro Team
- Team Agro

Departments/ Teams/Groups

Groups have existed in various forms across different services:

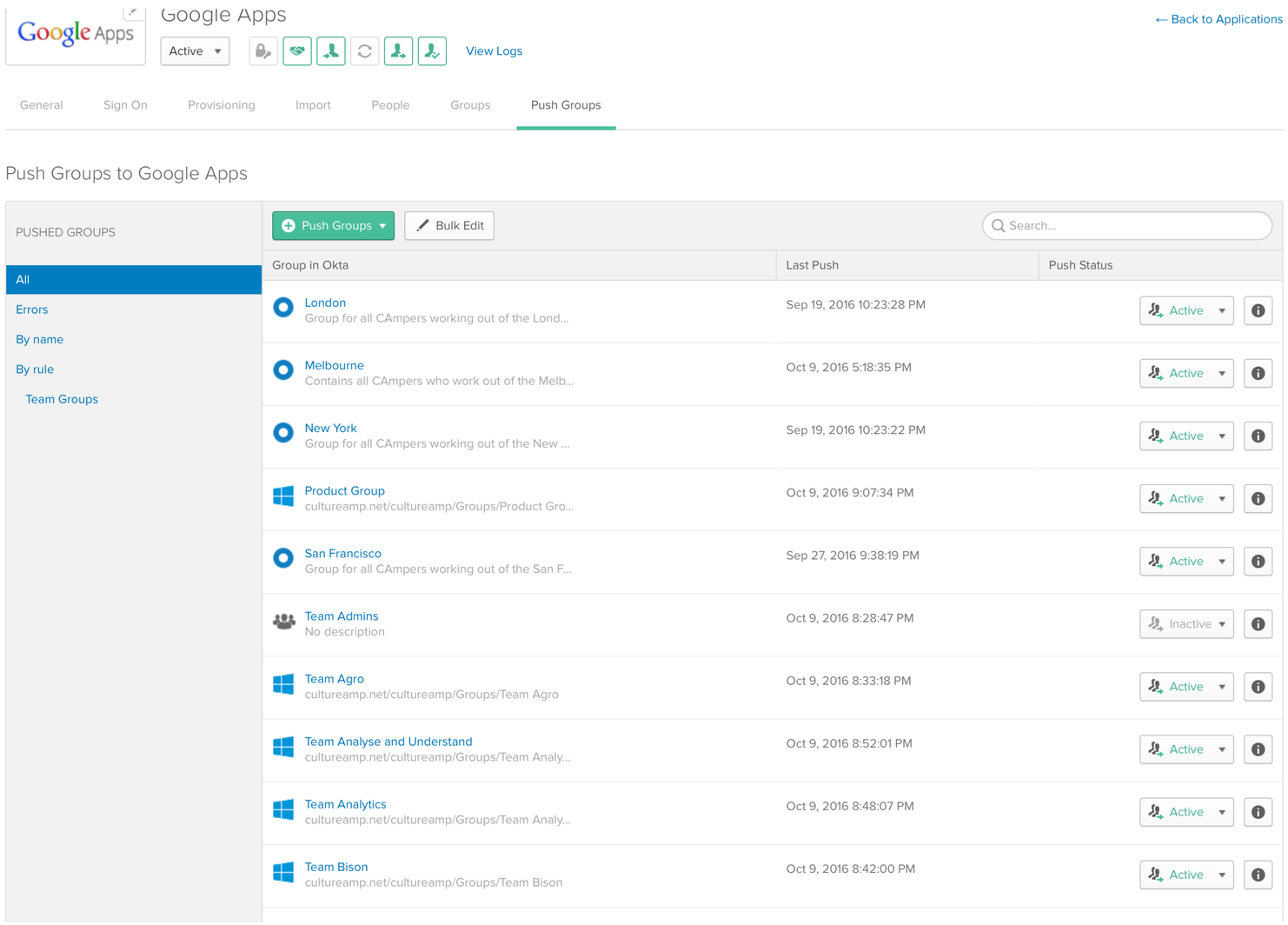
- Agro
- Agro Team
- **Team Agro**

Identity and Access Management

okta

Identity and Access Management

okta



Culture Amp

Identity and Access Management

okta

Google

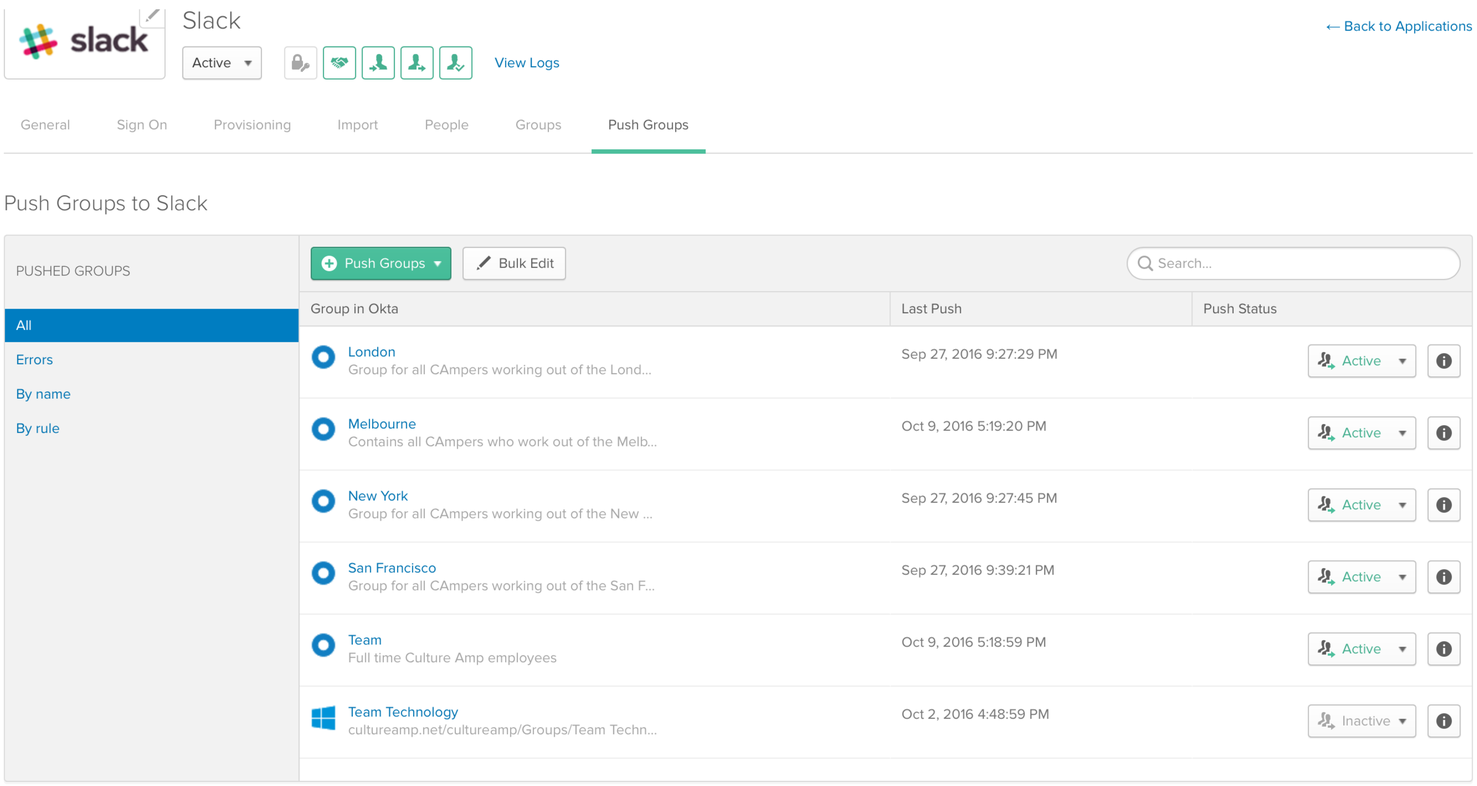
Search for users, groups, and settings (e.g. setup billing)

Groups

Groups	Email Address	Type
Team Agro	team_agro@cultureamp.com	Custom
Team Analyse and Understand	team_analyse_and_understand@cultureamp.com	Custom
Team Analytics	team_analytics@cultureamp.com	Custom
Team Bison	team_bison@cultureamp.com	Custom
Team ChaCha	team_chacha@cultureamp.com	Custom
Team Community	team_community@cultureamp.com	Custom
Team Customer Growth	team_customer_growth@cultureamp.com	Custom
Team Customer Support Engineering	team_customer_support_engineering@cultureamp.com	Custom
Team Danger	team_danger@cultureamp.com	Custom
Team Data Lab	team_data_lab@cultureamp.com	Custom
Team Data Services	team_data_services@cultureamp.com	Custom

Identity and Access Management

okta



Culture Amp

Identity and Access Management

okta

Edit Customer Group

Name

Customer Group

Handle

customer

You'll use this handle to get the group's attention. It should be all lowercase, with no spaces.

Purpose (optional)

What's this group about?

Default channels: (optional)

#asknicely × #customer_group × #dings_gongs_yays × #kudos ×

New members will be automatically added to default channels. Existing members will be added immediately.

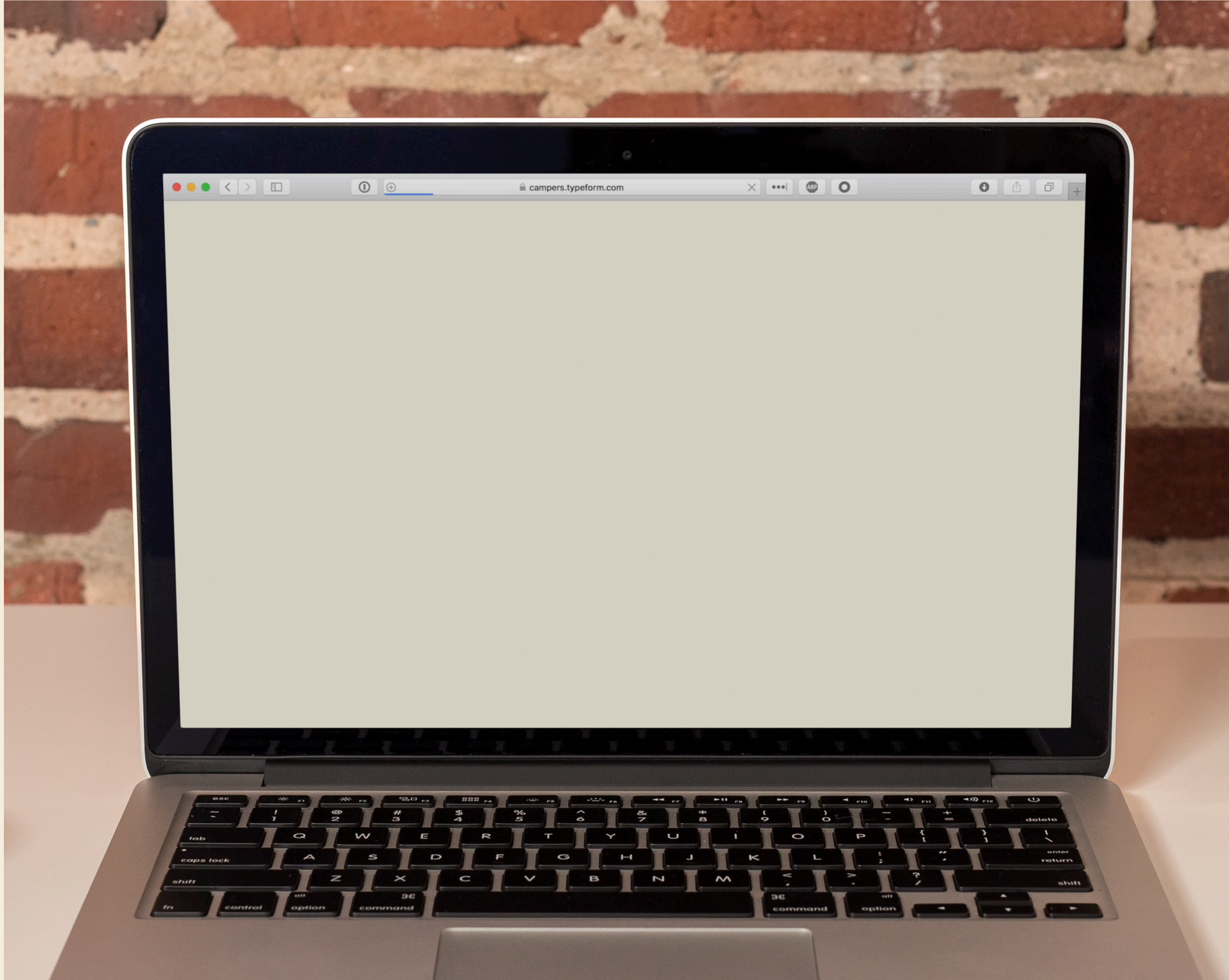
Culture Amp

Pre-onboarding

Typeform

Pre-onboarding

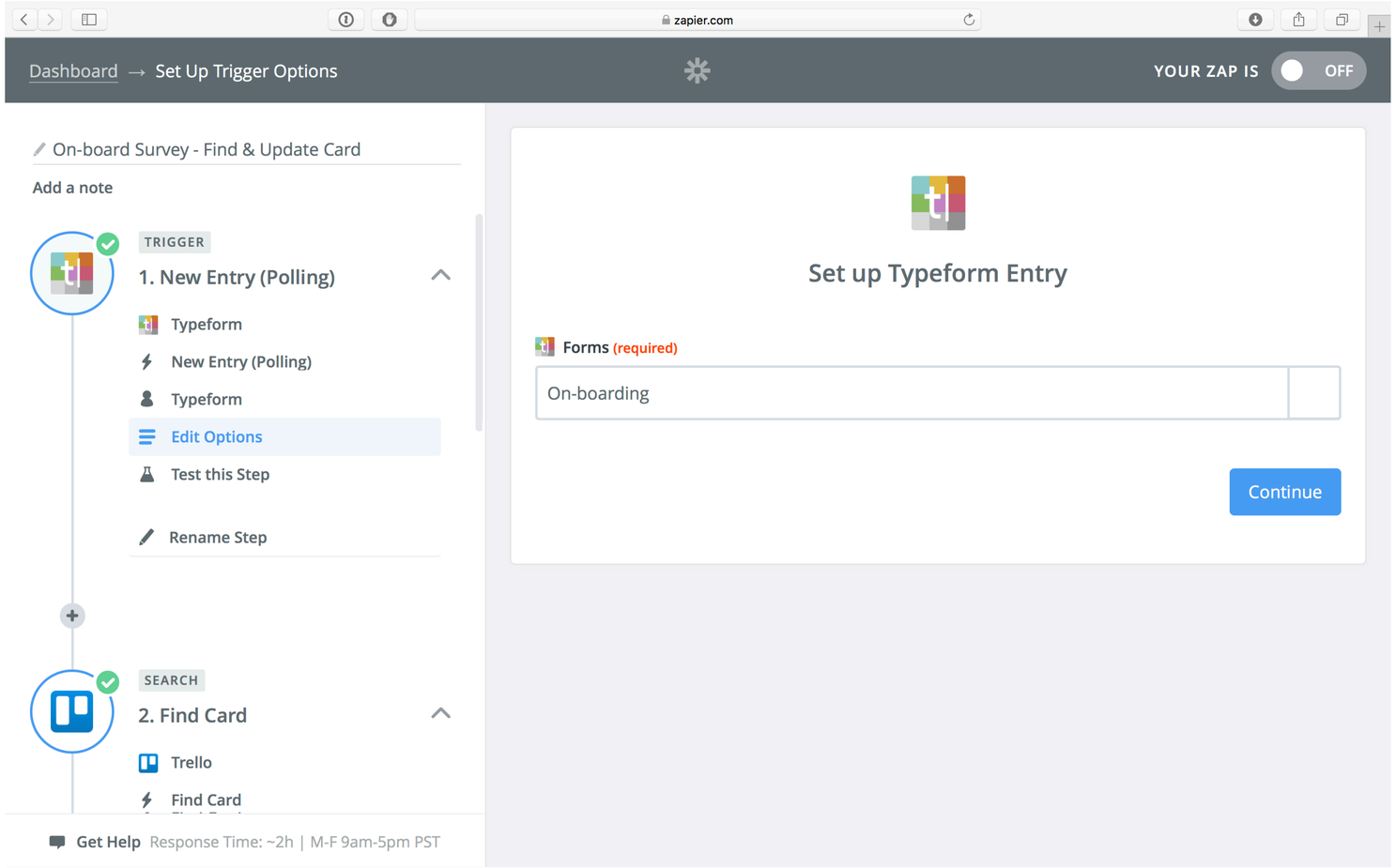
Typeform



Culture Amp

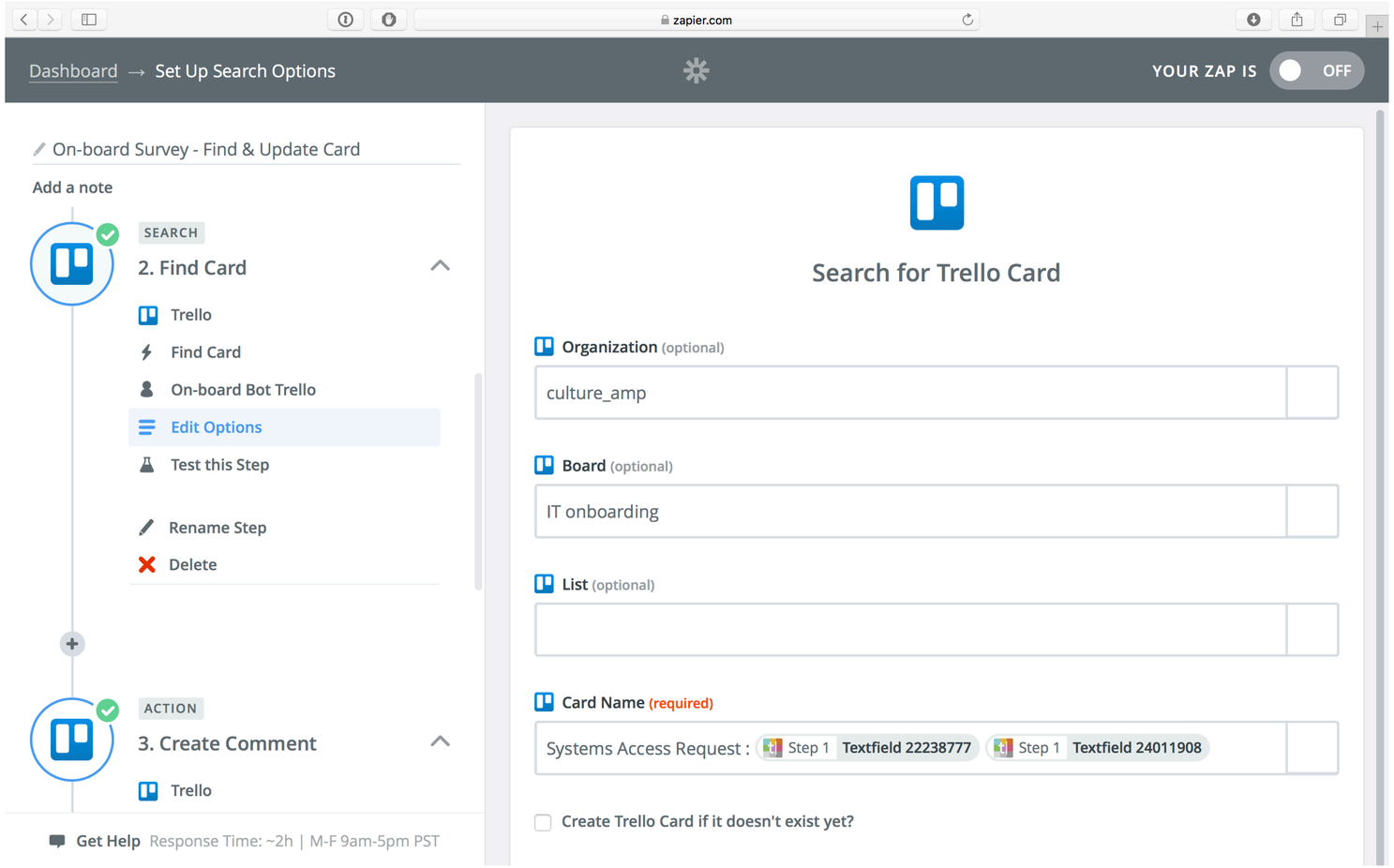
Pre-onboarding

zapier



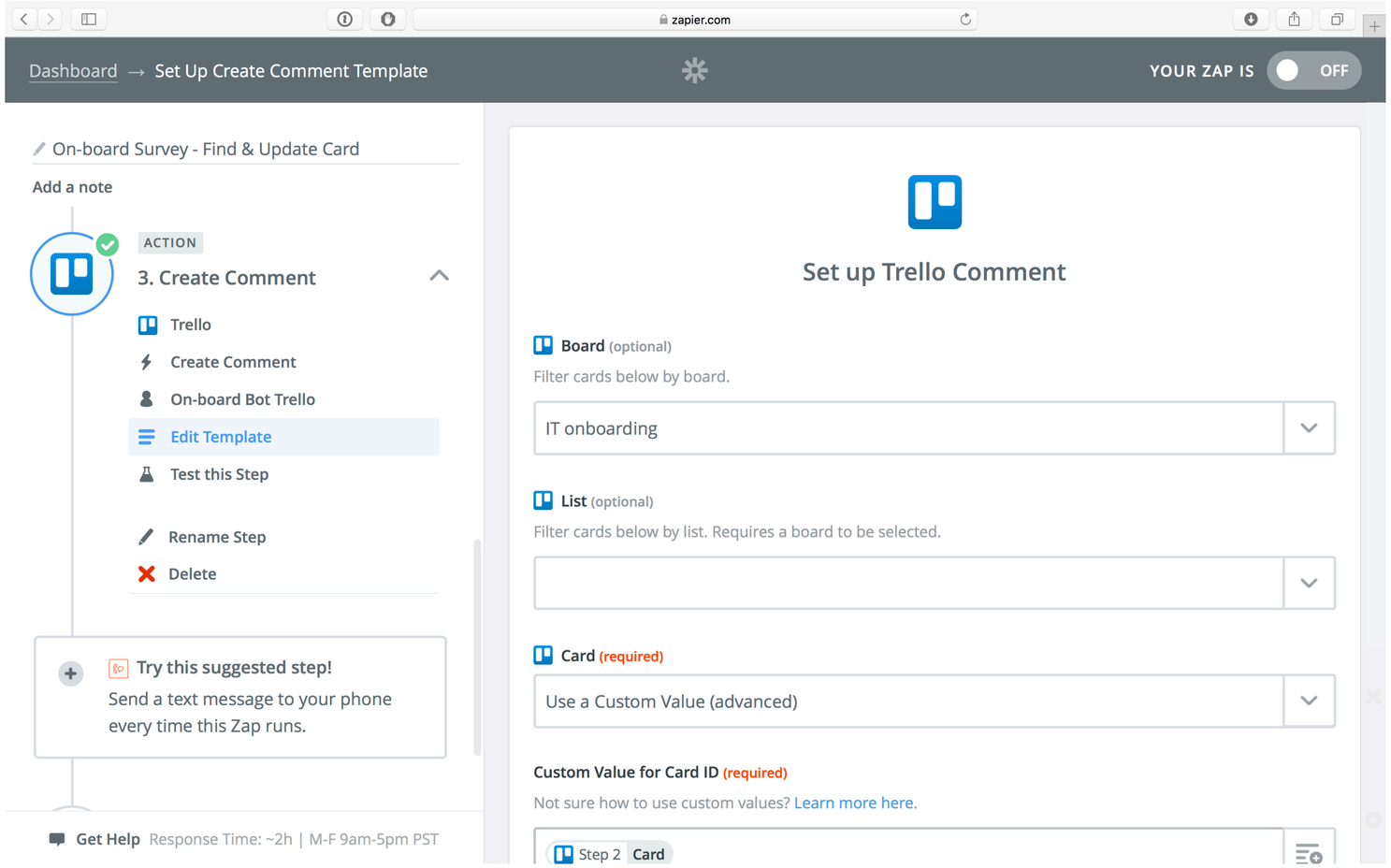
Pre-onboarding

zapier



Pre-onboarding

zapier



Pre-onboarding

zapier

zapier.com

Dashboard → Set Up Create Comment Template

YOUR ZAP IS OFF

On-board Survey - Find & Update Card

Add a note

ACTION

3. Create Comment

Trello

Create Comment

On-board Bot Trello

Edit Template

Test this Step

Rename Step

Delete

Try this suggested step!

Send a text message to your phone every time this Zap runs.

Get Help Response Time: ~2h | M-F 9am-5pm PST

Step 2 Card

Comment Text (required)

Gear

Engineer Spec: Step 1 List 24806314 Choice

Computer: Step 1 Listimage 22233620 Choice - Step 1 Listimage 22238364 Choice

Colour: Step 1 Listimage 35951298 Choice

Have they used a Mac before: Step 1 List 26435171 Choice

Keyboard: Step 1 List 23292054 Choice - Step 1 Listimage 23292200 Other

Step 1 Listimage 23292200 Choice Step 1 Listimage 22237766 Choice

Step 1 Listimage 22237766 Other

Mouse: Step 1 Listimage 22238008 Choice Step 1 Listimage 22238008 Other

Headset: Step 1 List 24806365 Choice

Swag

T-Shirt: Step 1 List 22238706 Choice Step 1 List 22238706 Other

Favourite Colour: Step 1 Textfield 23291618

Pre-onboarding

Trello

OB

On-board Bot

Gear

Engineer Spec: Yes
Computer: MacBook Pro - 15"
Have they used a Mac before: Yes
Keyboard: Extended - Mechanical Keyboard
Mouse: MX Master
Headset: No

Swag

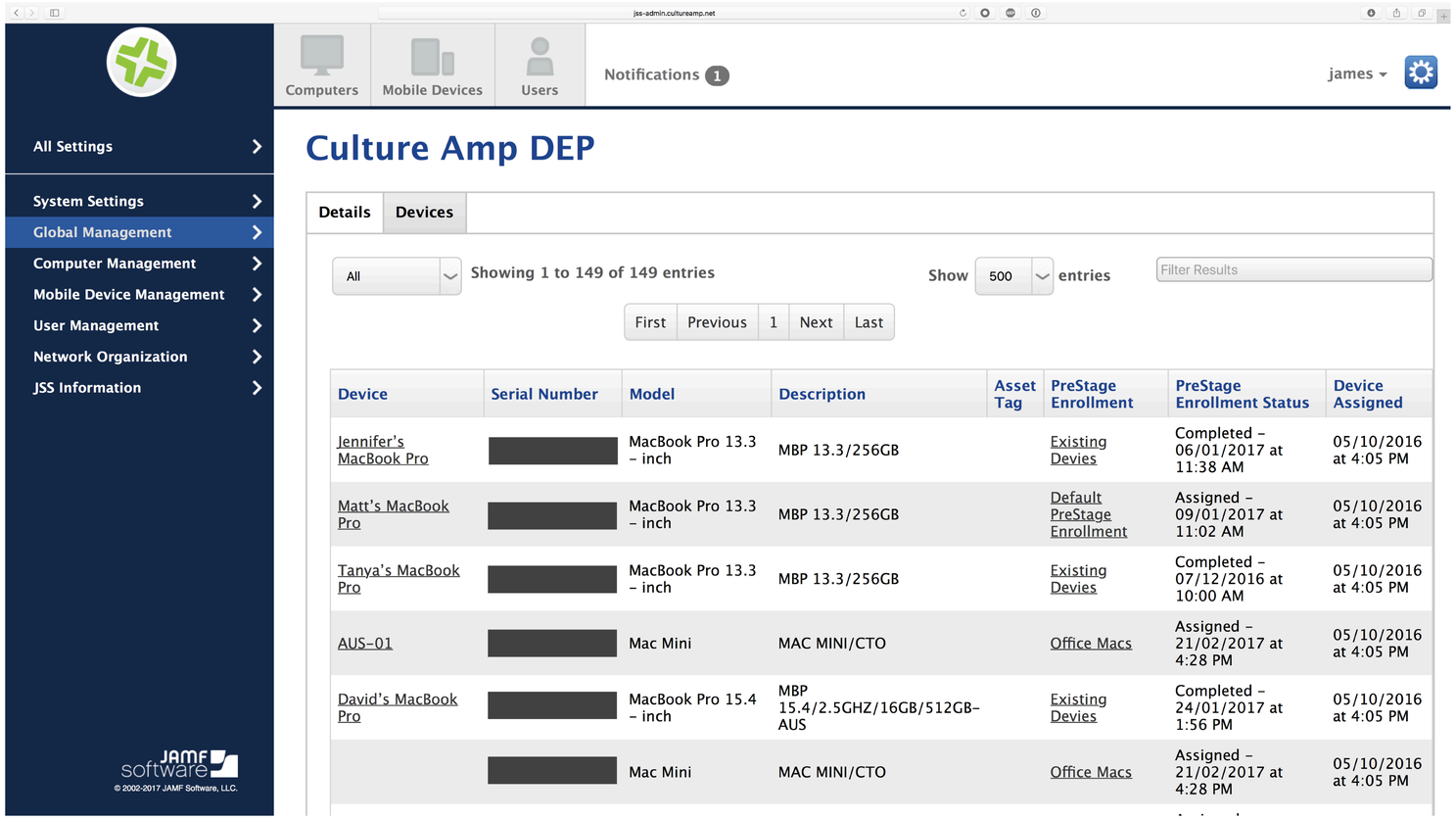
T-Shirt: L
Favourite Colour: Green

2 minutes ago

End Point Management

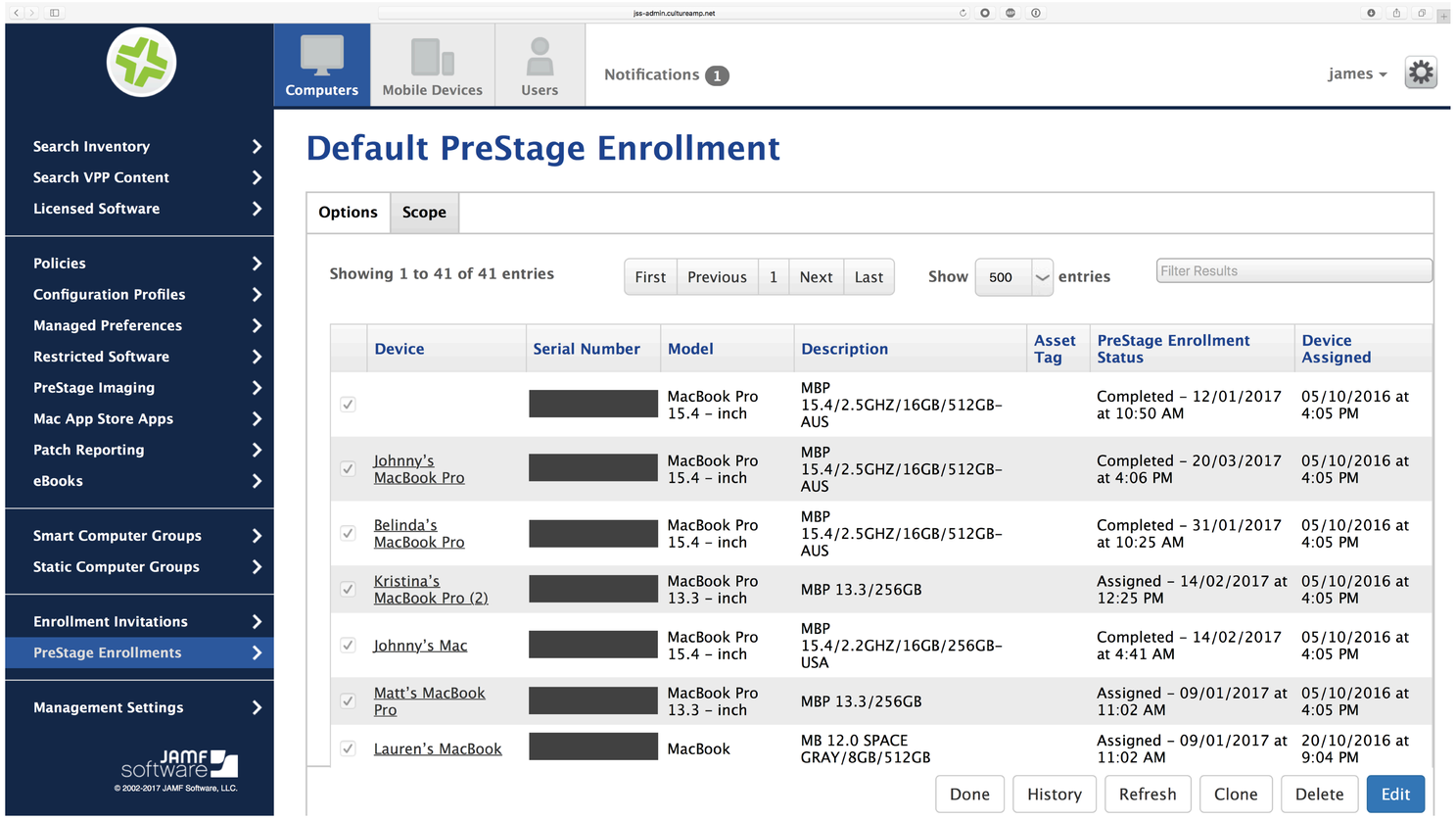
Jamf

Jamf



Device	Serial Number	Model	Description	Asset Tag	PreStage Enrollment	PreStage Enrollment Status	Device Assigned
Jennifer's MacBook Pro	[redacted]	MacBook Pro 13.3 - inch	MBP 13.3/256GB		Existing Devies	Completed - 06/01/2017 at 11:38 AM	05/10/2016 at 4:05 PM
Matt's MacBook Pro	[redacted]	MacBook Pro 13.3 - inch	MBP 13.3/256GB		Default PreStage Enrollment	Assigned - 09/01/2017 at 11:02 AM	05/10/2016 at 4:05 PM
Tanya's MacBook Pro	[redacted]	MacBook Pro 13.3 - inch	MBP 13.3/256GB		Existing Devies	Completed - 07/12/2016 at 10:00 AM	05/10/2016 at 4:05 PM
AUS-01	[redacted]	Mac Mini	MAC MINI/CTO		Office Macs	Assigned - 21/02/2017 at 4:28 PM	05/10/2016 at 4:05 PM
David's MacBook Pro	[redacted]	MacBook Pro 15.4 - inch	MBP 15.4/2.5GHZ/16GB/512GB-AUS		Existing Devies	Completed - 24/01/2017 at 1:56 PM	05/10/2016 at 4:05 PM
	[redacted]	Mac Mini	MAC MINI/CTO		Office Macs	Assigned - 21/02/2017 at 4:28 PM	05/10/2016 at 4:05 PM

Jamf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Computers
Mobile Devices
Users
Notifications 1
james
Search Inventory
Search VPP Content
Licensed Software
Policies
Configuration Profiles
Managed Preferences
Restricted Software
PreStage Imaging
Mac App Store Apps
Patch Reporting
eBooks
Smart Computer Groups
Static Computer Groups
Enrollment Invitations
PreStage Enrollments
Management Settings
JAMF software
© 2002-2017 JAMF Software, LLC.
Default PreStage Enrollment
Options
Scope
Showing 1 to 41 of 41 entries
First
Previous
1
Next
Last
Show
500
entries
Filter Results
Device
Serial Number
Model
Description
Asset Tag
PreStage Enrollment Status
Device Assigned
MacBook Pro 15.4 - inch
MBP 15.4/2.5GHZ/16GB/512GB-AUS
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05/10/2016 at 4:05 PM
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Matt's MacBook Pro
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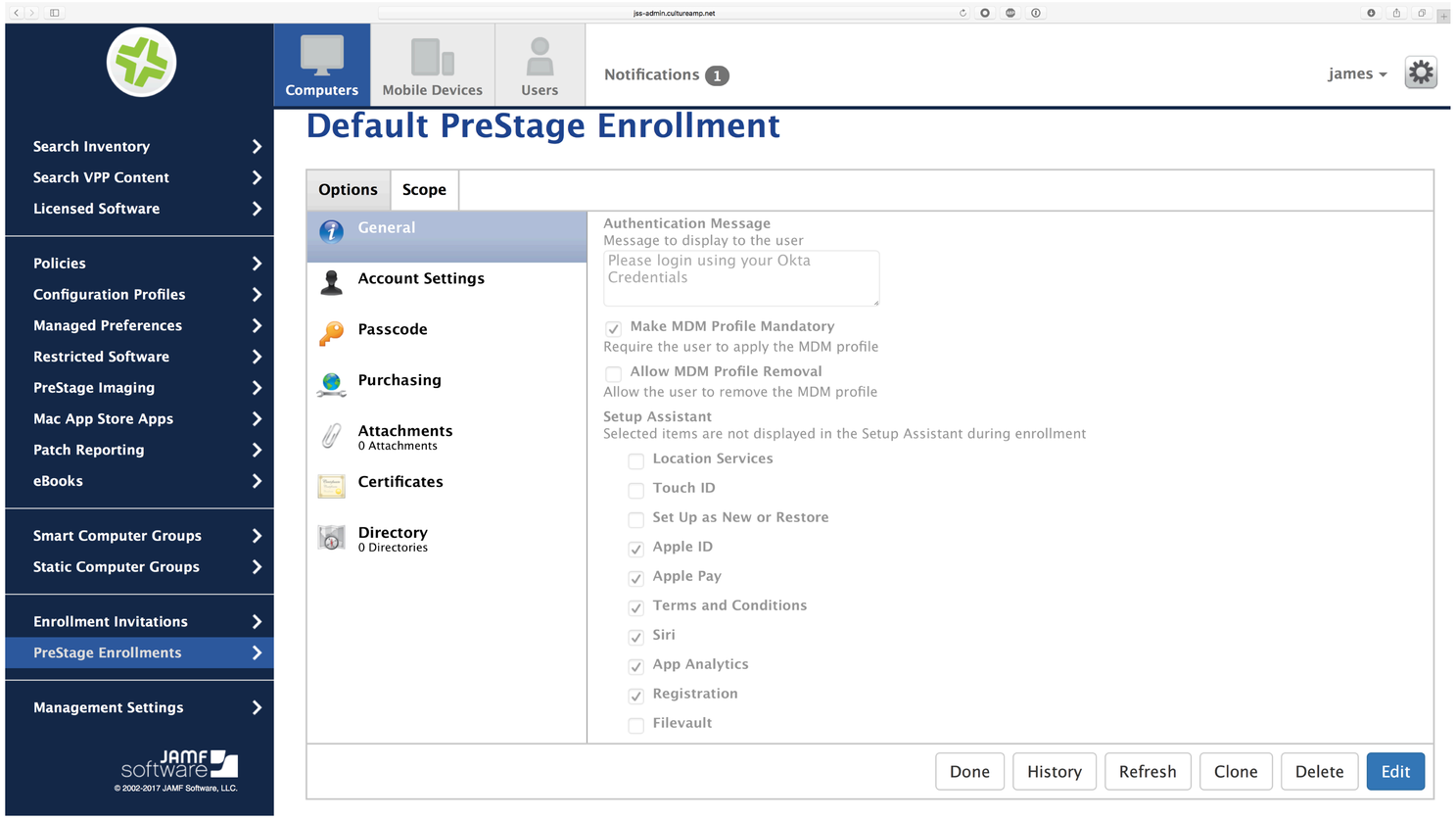
05/10/2016 at 4:05 PM
Lauren's MacBook
MacBook
MB 12.0 SPACE GRAY/8GB/512GB
Assigned - 09/01/2017 at 11:02 AM
20/10/2016 at 9:04 PM
Done
History
Refresh
Clone
Delete
Edit

Jamf


jss-admin.cultureamp.net
Computers
Mobile Devices
Users
Notifications 1
james
Search Inventory
Search VPP Content
Licensed Software
Policies
Configuration Profiles
Managed Preferences
Restricted Software
PreStage Imaging
Mac App Store Apps
Patch Reporting
eBooks
Smart Computer Groups
Static Computer Groups
Enrollment Invitations
PreStage Enrollments
Management Settings
JAMF software
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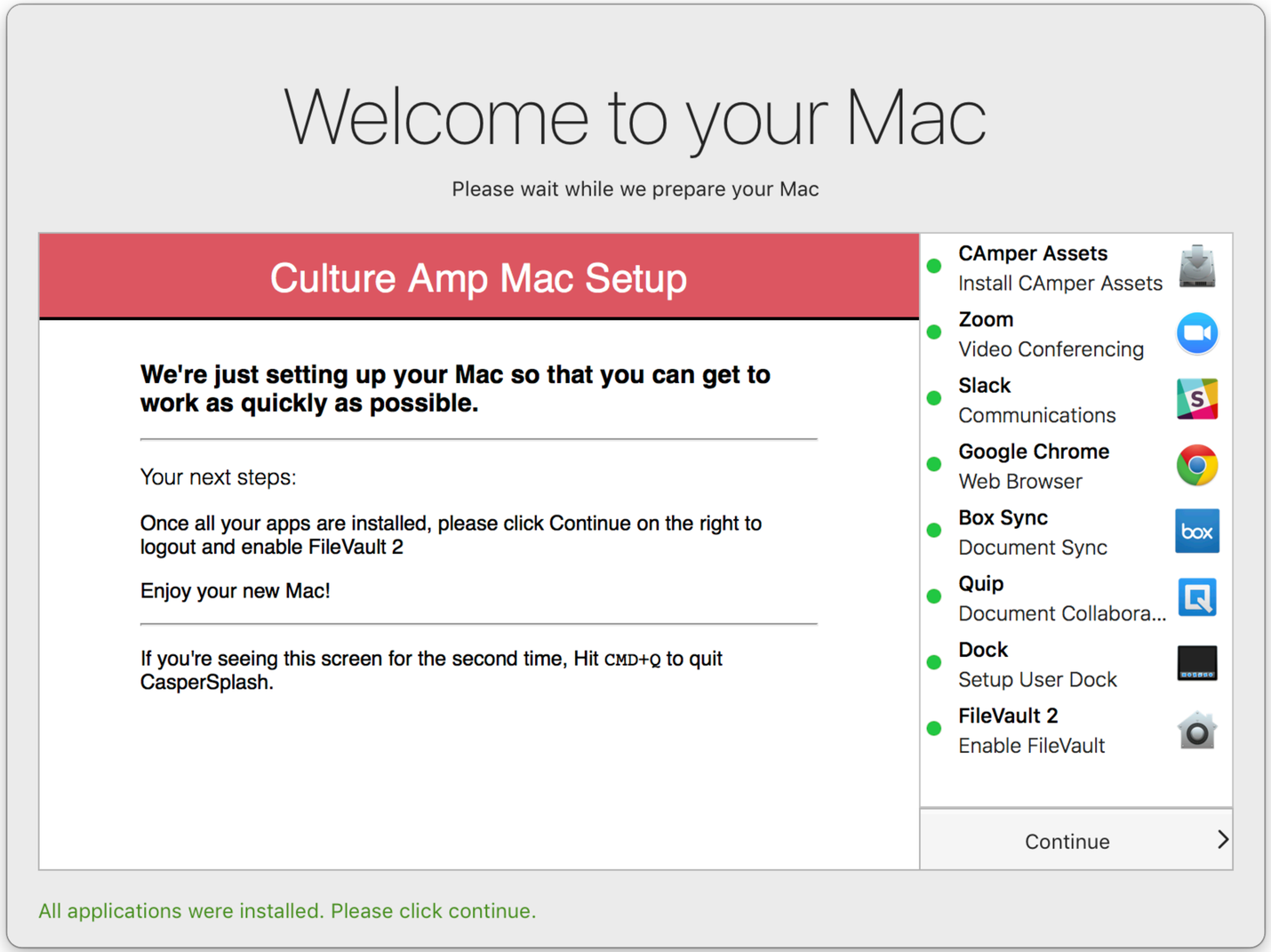
Default PreStage Enrollment
Options
Scope
General
Account Settings
Passcode
Purchasing
Attachments
0 Attachments
Certificates
Directory
0 Directories
Authentication Message
Message to display to the user
Please login using your Okta Credentials
Make MDM Profile Mandatory
Require the user to apply the MDM profile
Allow MDM Profile Removal
Allow the user to remove the MDM profile
Setup Assistant
Selected items are not displayed in the Setup Assistant during enrollment
Location Services
Touch ID
Set Up as New or Restore
Apple ID
Apple Pay
Terms and Conditions
Siri
App Analytics
Registration
Filevault
Done
History
Refresh
Clone
Delete
Edit

SplashBuddy



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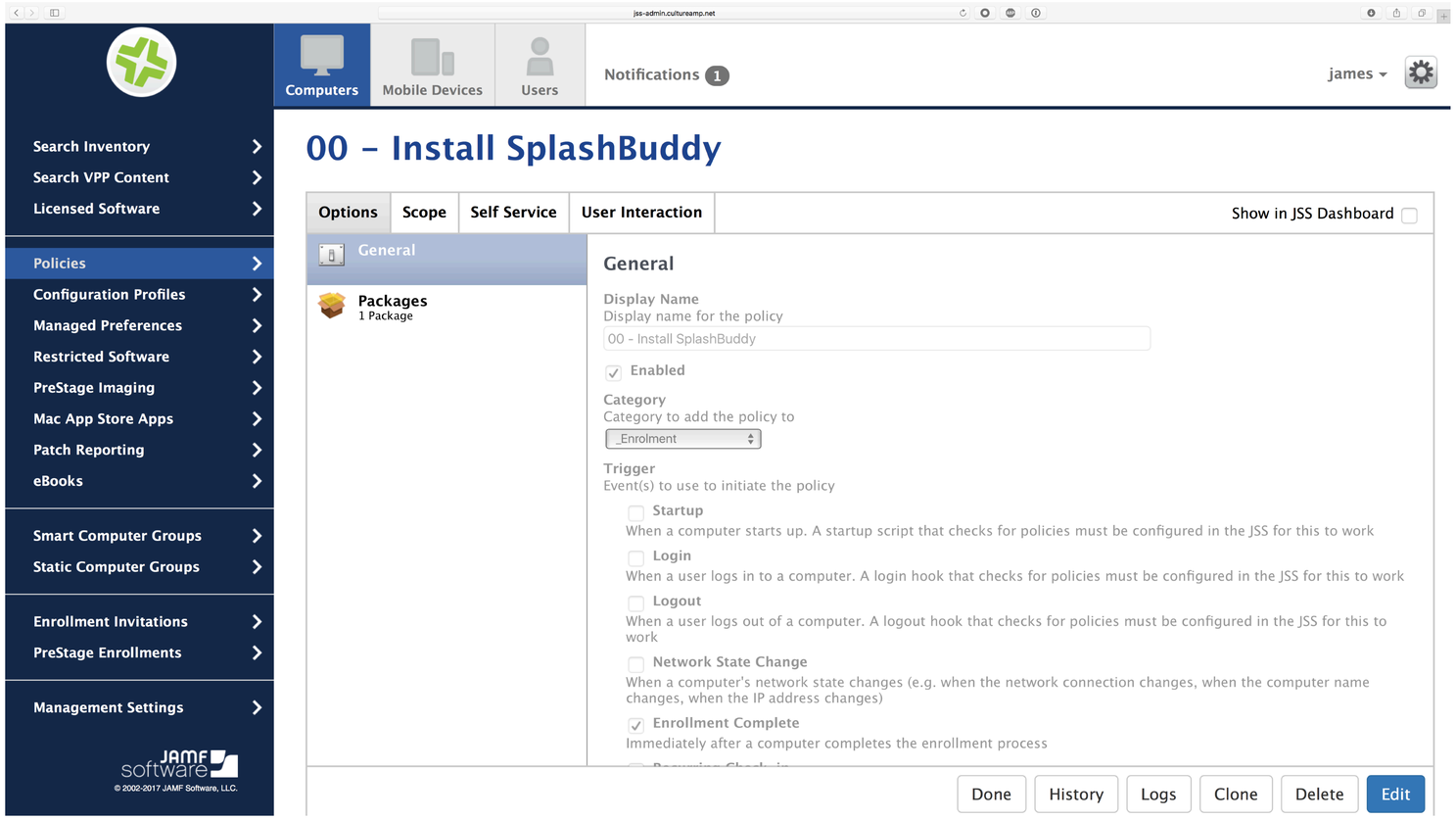
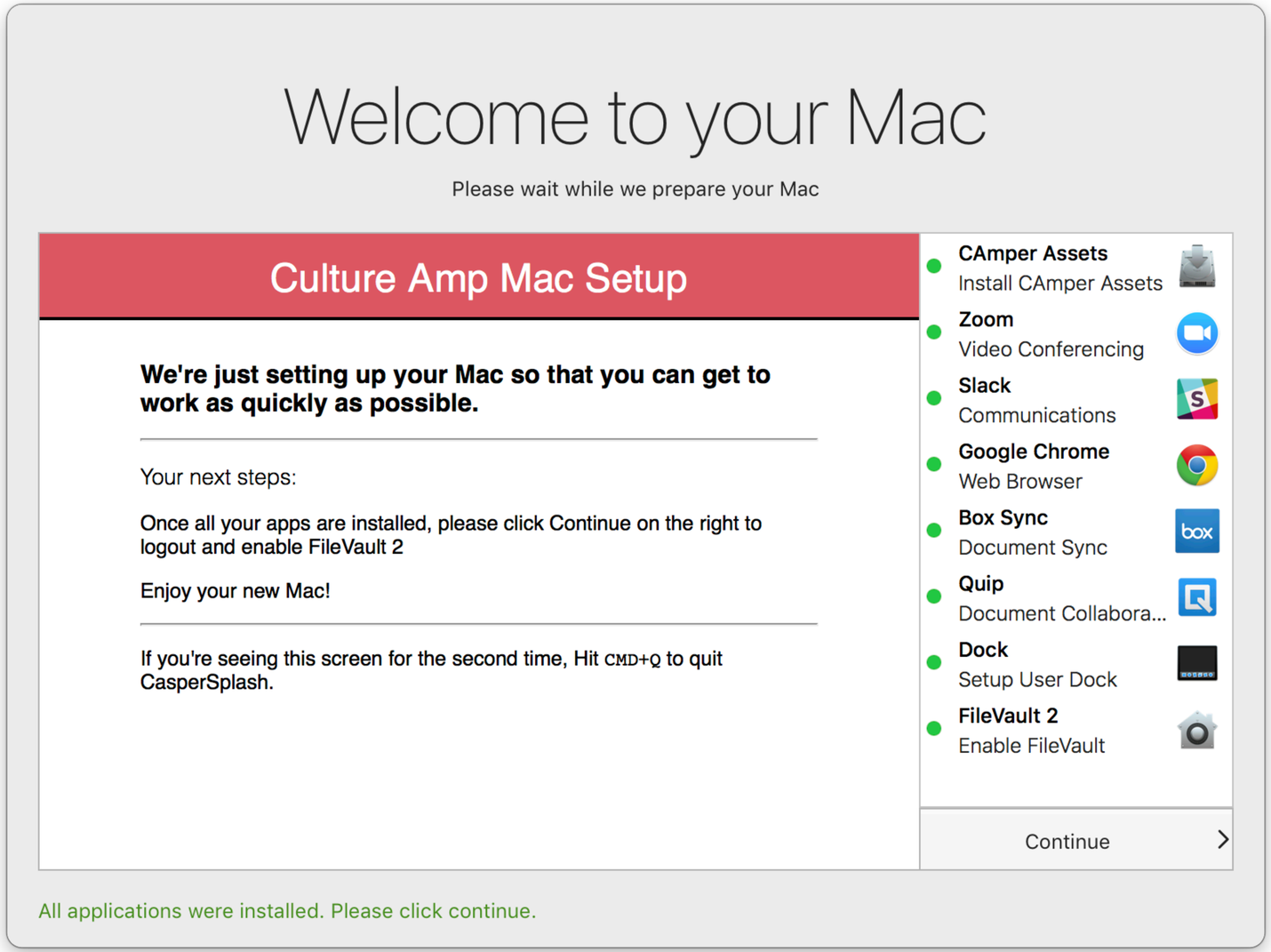


SplashBuddy



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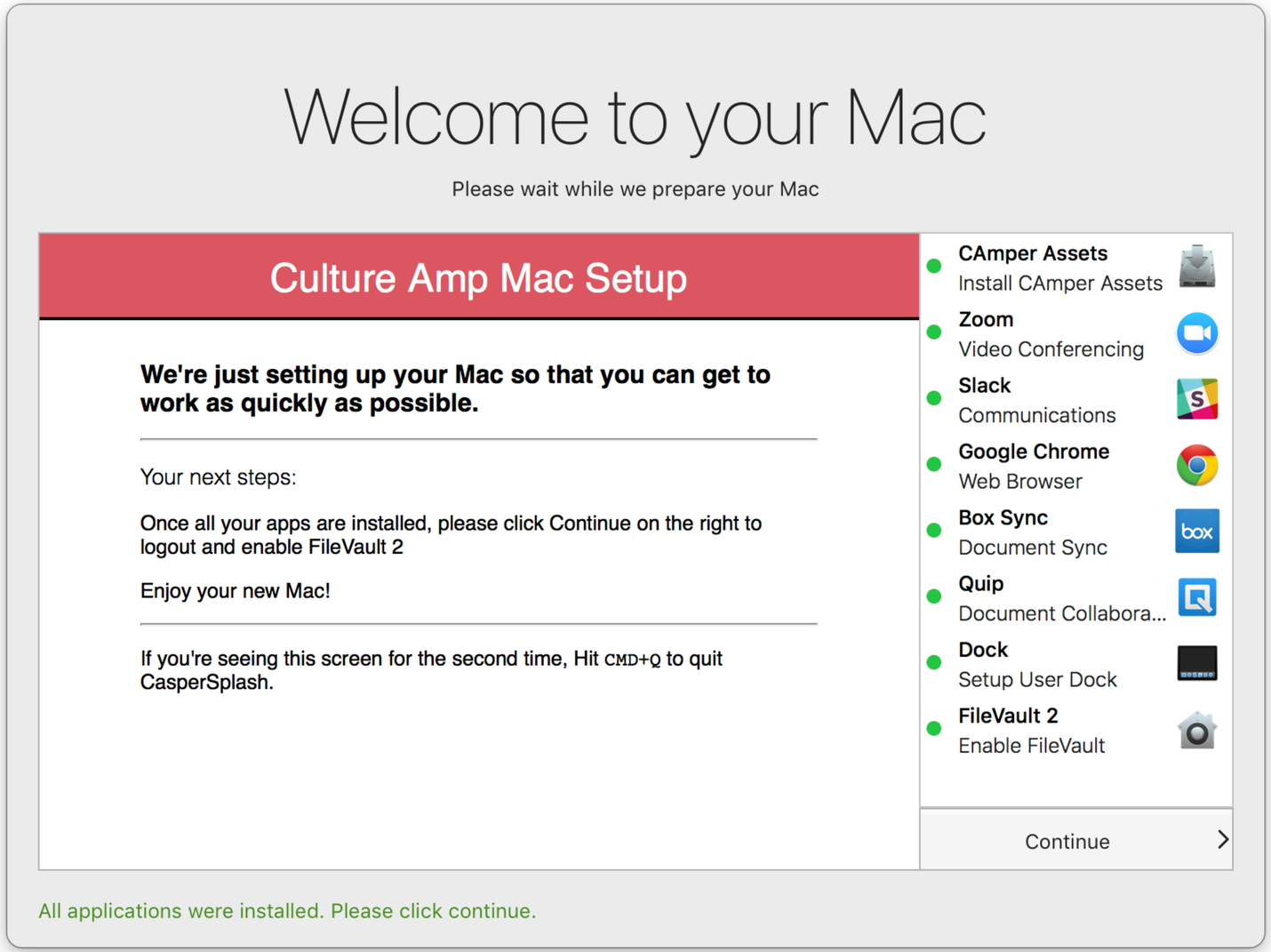

Thanks!

Q & A