

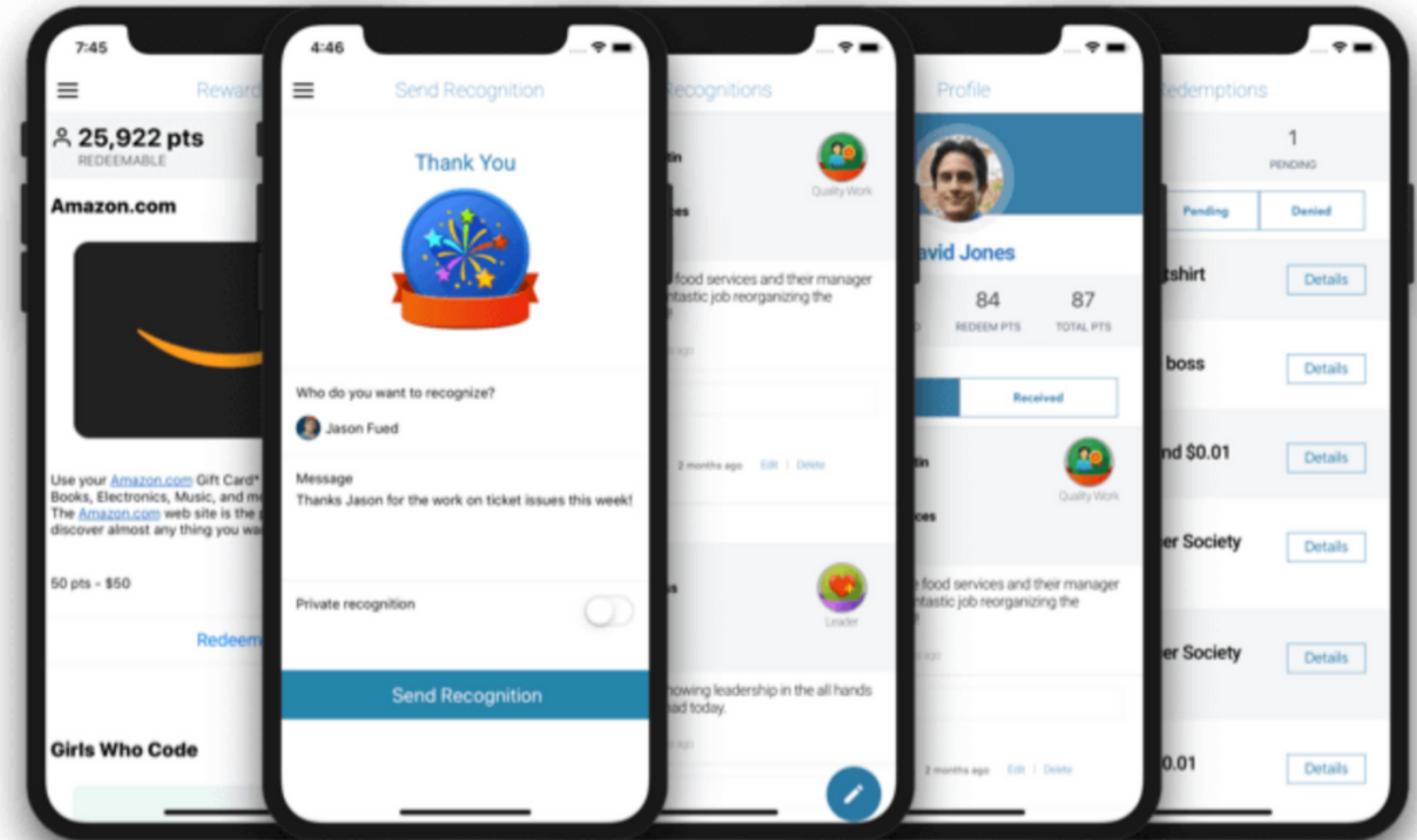
 Recognize
Admin Training



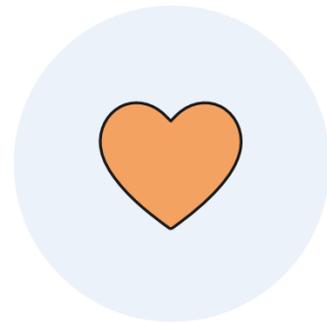
About Recognize

Appreciate, congratulate, and celebrate employees

Recognize is an employee engagement platform that enables peer recognition, nominations, rewards, award certificates, & much more. Recognize empowers company culture through positive employee experiences.



Why We Think You'll Love Recognize



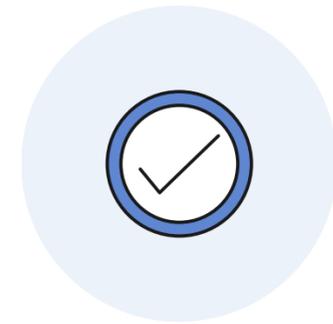
Easy to Use

With a simple user interface, admins can easily configure and manage programs



Accessible

Recognize was built to be incorporated into the tools you're already using



Helps You Keep Track

Creates track record of successes for your organization that can be measured over time

Recognition Stats



63% of employees who feel recognized are unlikely to look for a new job

Source: [Bonusly & Survey Monkey](#)



If companies double the number of employees they recognize every week, there will be:

- 24% improvement in work quality
- 27% reduction in absenteeism
- 10% reduction in staff shrinkage

Source: [Gallup](#)



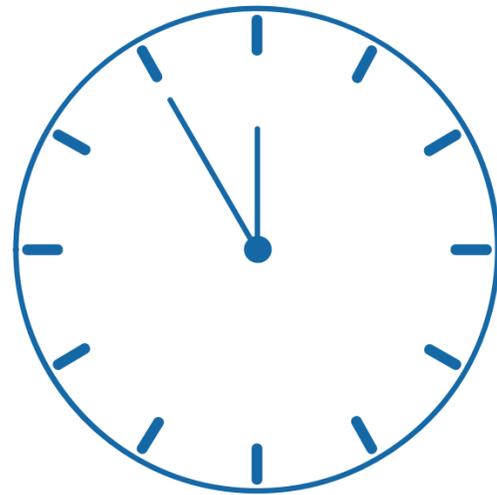
Recognition Best Practices

How often should employees be recognized?

According to a survey by Gallup, recognizing employees at least **once per week** is best to prevent burnout. This could be any form of recognition.

Setting goals for leaders to like and comment on each recognition will show employees that their leaders are paying attention to their achievements.

Elements of Meaningful Recognition



Timely

Now, not later

In order to remain relevant, recognition should be timely.



Specific

What & why

For best results, list what the action was, and why it was impactful.



Genuine

Sincerely authentic

Recognition should be heartfelt and customized to make it memorable.

Goals: Daily, Monthly, Quarterly, Yearly



Daily

Set a calendar reminder to view the Stream page of Recognize and like and comment on recognitions your users have sent. Take this time to also send any recognition that is timely.



Monthly

Review what recognitions have been sent over the course of the month, and find opportunities to highlight these in a company newsletter or other companywide communication.



Quarterly

Visit your RES page to track engagement. Run a quarterly Nomination campaign to boost participation.

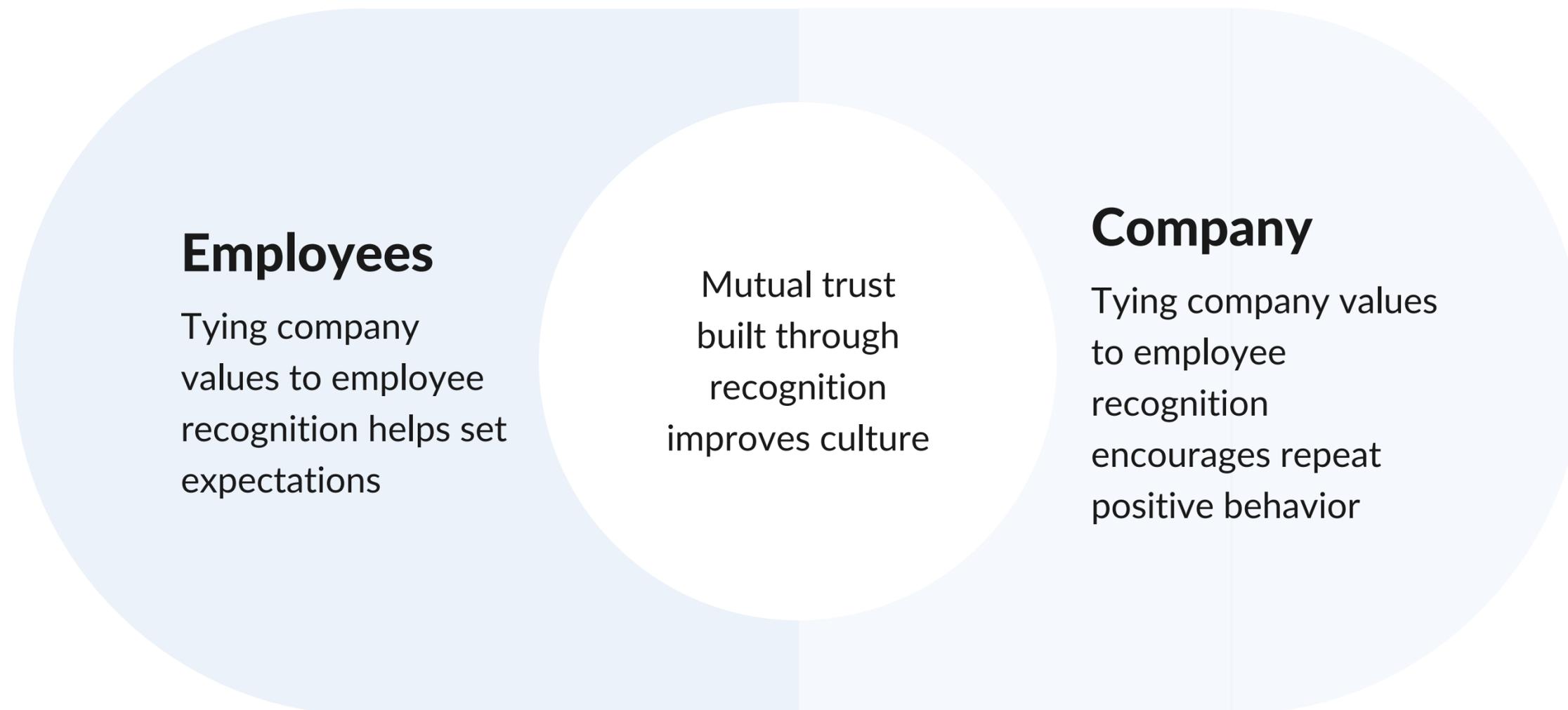


Yearly

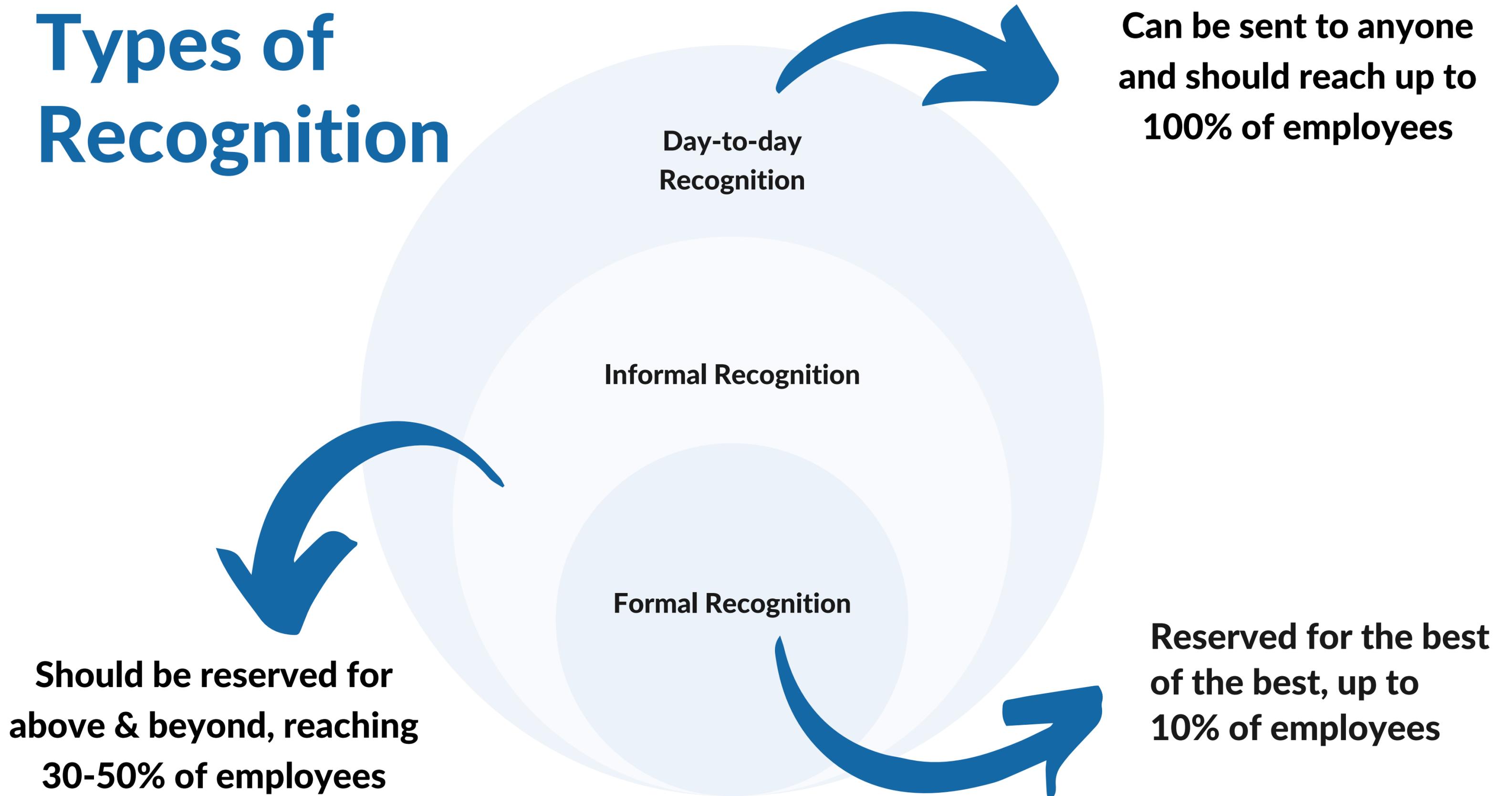
Reevaluate your programs on a yearly basis to make sure they are still meeting the mark with your employees. Add new programs or offerings on a yearly basis to keep things fresh!

Recognizing Core Values

Think of recognition as a way to highlight what's most important



Types of Recognition



Can be sent to anyone
and should reach up to
100% of employees

Should be reserved for
above & beyond, reaching
30-50% of employees

Reserved for the best
of the best, up to
10% of employees

Creating a Culture of Recognition

Comes Down to...



Getting Your Leaders Onboard

Set expectations for recognizing direct reports, make recognition training a part of leader onboarding, and leverage leaders as recognition champions



Sharing Goals & Results

Make sure your workforce is aware of company goals, and tie values and goals to recognition. Then, share goals met and progress along the way



Making Recognition a Part of the Day-to-Day

Consistency is key! Model the behavior you want to see and lean on champions. Your org will soon see that recognizing others is what's expected and will follow the lead



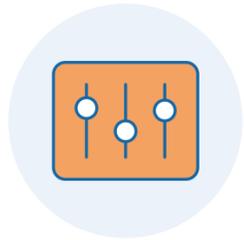
**Getting Started
with Recognize as
an Admin - Video**

Exploring the Admin Portal

Be sure to bookmark the link above in your browser!



Company Admin Portal Highlights



Dashboard Tab

Monitor org activity at a glance.



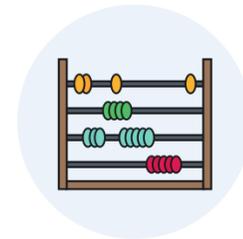
Custom Badges Tab

Create Badges for peer-to-peer or leader-to-employee recognition.



Users Tab

Manage users and view users by status, department, and team.



Points Tab

Table view of point activity across the organization.



Announcements Tab

Communicate campaign details to your users on the Stream or by email/text.



Rewards Tab

Build out Rewards catalogs, manage offerings, and view balances.

Company Admin Portal Highlights



Nominations Tab

Review incoming Nominations, export and select winners.



Recognitions Tab

See details for recognitions companywide and pull reports.



Tasks Tab

Create and manage Tasks companywide.



Comments Tab

See details for comments companywide and pull reports.



Anniversaries Tab

Manage Anniversary & Birthday Badges.



Roles Tab

Create Company Roles to assign to users, Badges and catalogs.

Company Admin Portal Highlights



Tags Tab

Create Tags to align initiatives across Recognitions and Tasks for reporting purposes.



Documents Tab

Extract files from exports or load files for imports.



Settings

Manage companywide/global settings for your organization.

Viewing the Dashboard & Pulling Engagement Reports

As a Company Admin for the Recognize platform, one of your main responsibilities will be to keep tabs on recognition engagement. It's important to check the Recognize Dashboard and pull engagement reports regularly to keep a pulse on usage and top performers!

Here are some helpful articles on this topic:

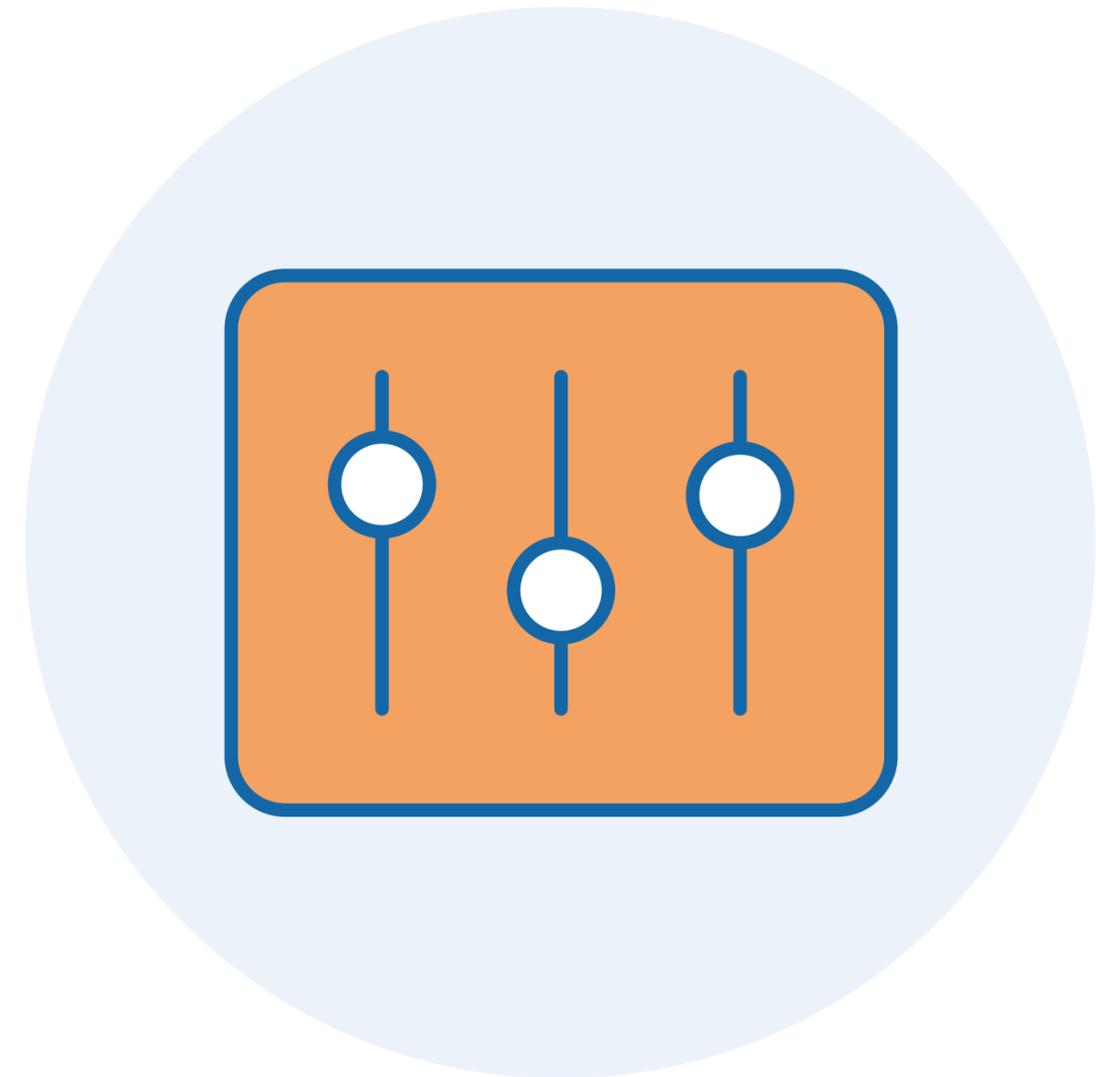
[Dashboard & Engagement Metrics](#)

[How to View Employee Engagement Reports](#)

[How to Check Adoption Rates](#)

[Report for Employees Who Have Not Received Recognition](#)

[Report of Users Who Are Not Yet Active](#)



Managing Users

User accounts are managed [manually/automatically] through use of a [spreadsheet upload/user sync] that occurs [daily/weekly/monthly/quarterly]. As a Company Admin, it will be a responsibility of yours to keep user accounts up to date by updating data as the org changes (i.e. employees leave, new employees join, roles change). You will also be in charge of inviting users to the platform after account creation through either a manual invite, or the auto-invite feature (if initial launch has already occurred).

Here are some helpful articles on this topic:

[Spreadsheet Import: Step-by-step](#)

[How to Manage Users \(Add, Disable, or Edit\)](#)

[Inviting Users to Recognize](#)



Creating Announcements

Announcements can be used to communicate a recognition campaign, reminders, or anything else you'd like to share with your organization. Only Company Admins can post Announcements, and they will show up on the right side of the Stream Page for users. You can also send announcements via text and email!

Here are some helpful articles on this topic:

[How to Use the Announcements Feature](#)

[Announcements Overview Video](#)



Creating Custom Badges

Custom Badges can be created for both social recognition that shows up in the Stream Page, and Nomination submissions for your private voting system. As a Company Admin, you have the ability to create and configure Badges, as well as enable and disable them.

Here are some helpful articles on this topic:

[Creating Badges with Proper Dimensions](#)

[How to Disable/Enable Badges](#)

[Recognitions: Step-by-step Instructions](#)



Approving Recognitions

If your organization has chosen to have an approval process for Recognitions, you will have the ability as a Company Admin to approve or deny recognitions. Approval processes ensure there is oversight of quality and frequency of recognitions being sent, as well as help with managing the budget.

Here are some helpful articles on this topic:

[Approving Recognitions as a Company Admin](#)



Approve recognition?

Please confirm recognition message and points.

Sender: Bob Martin
Recipients: Dani Olson and Angela Martin
Badge:  Customer Listener

Recognition Message:

B /       GIF

Great work!

Recognition Points:

0

Approve

Cancel



Recognition Approved!

Recognition has been successfully approved.

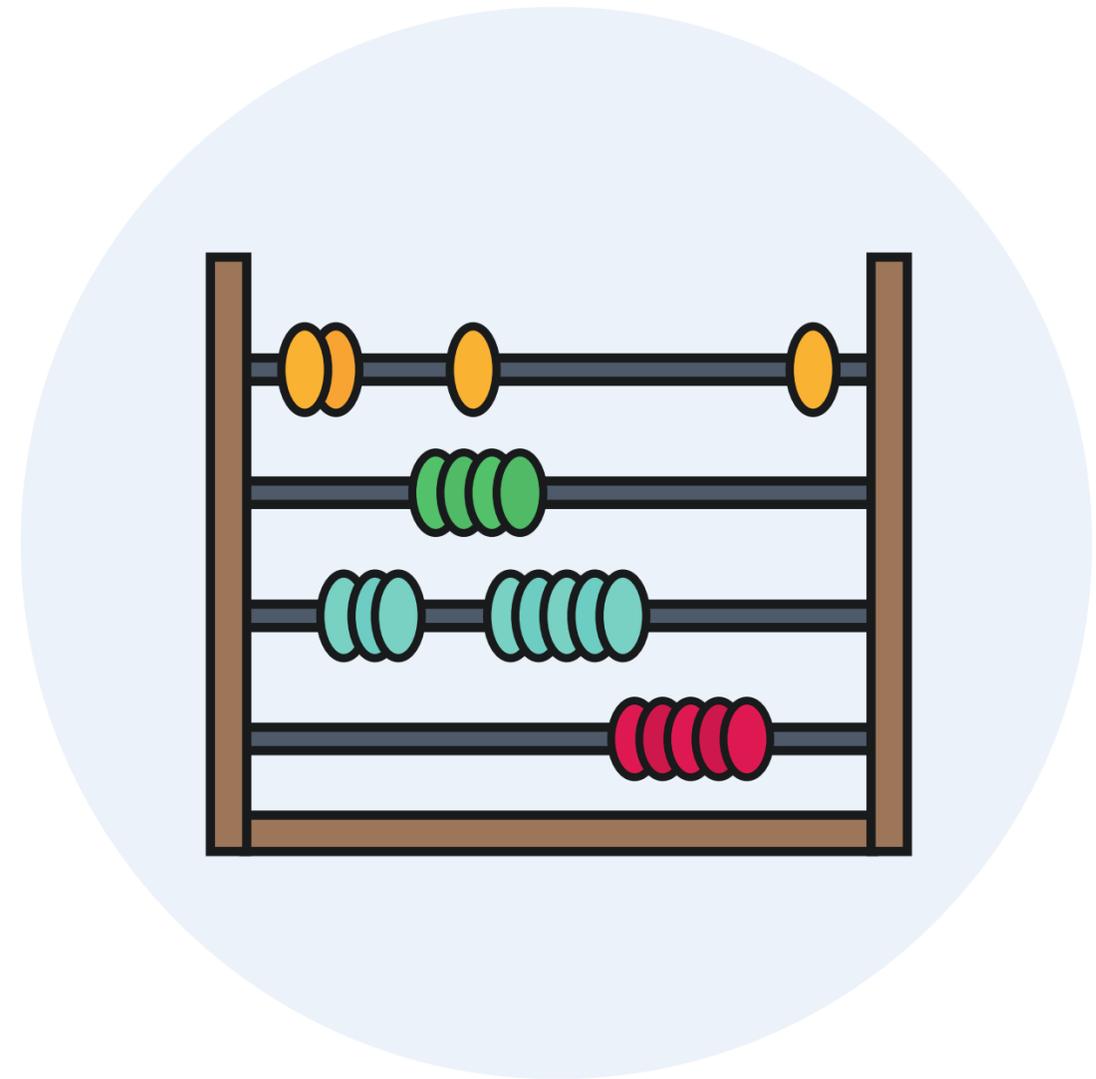
OK

Running a Points Report

As a Company Admin, it's helpful to see how many employees have outstanding points that have yet to be redeemed. Not only does this give you insight into how many points are out there, but over time, this will give you an idea of what should be budgeted for Rewards in the future.

Here are some helpful articles on this topic:

[Running Reports for Redeemable Points](#)





Creating a Rewards Catalog

Company Admins are the owners of their organization's Reward Catalogs where employees can redeem their points. Rewards can include automatically fulfilled gift cards, gift cards that require approval from an Admin or Rewards Manager, or experiences and swag that your organization manages, which are referred to as Company-fulfilled Rewards or Custom Rewards.

Here are some helpful articles on this topic:

[Rewards Step-by-step Instructions](#)

[How to Create Custom Rewards \(Company-fulfilled\)](#)

[How to Create a Gift Card Reward \(Provider-fulfilled\)](#)



Approving & Denying Reward Redemptions

As a Company Admin, if your org has a Rewards approval process, you will have the ability to approve or deny Reward redemptions in order to help manage Rewards budgeting and to have oversight of what is being fulfilled.

Here are some helpful articles on this topic:

[Approving or Denying Rewards](#)

[How to Add or Change a Rewards Manager](#)



Creating & Managing Tasks

Within Recognize, Tasks work like incentives. As a Company Admin, you will have the distinct ability to create and assign Tasks to users for various initiatives to give users the opportunity to earn points upon completion. You will also be able to manage these Tasks from the Tasks tab.

Here is a helpful article on this topic:

[Tasks: Step-by-Step Instructions](#)



Approving a Task

Tasks work like incentives - an employee is assigned a task, then they report when it's been completed. The task is then approved or denied by you from within the 'Tasks' tab in the Company Admin portal, or their direct manager. If approved, the employee may receive points!

Here is a helpful article on this topic:

[Tasks: Step-by-Step Instructions](#)



Managing Anniversary & Birthday Badges

If your organization is using the automated Anniversary and Birthday feature, you'll be able to manage these Badges as an admin. You can customize the messaging and Badge images, as well as turn Badges on and off.

Here are some helpful articles on this topic:

[Anniversaries Step-by-Step](#)

[Birthday & Anniversary Notification Settings](#)

Running Recognition Reports

Recognition reports can give you more insight on the good things that have been happening with your organization! These reports can also be exported for your various reporting needs.

Here are some helpful articles on this topic:

[Reporting: Recognitions, Rewards, Nominations, Comments, & Tasks \(Company Admin\)](#)

[How to View Recognition Reporting by Role](#)

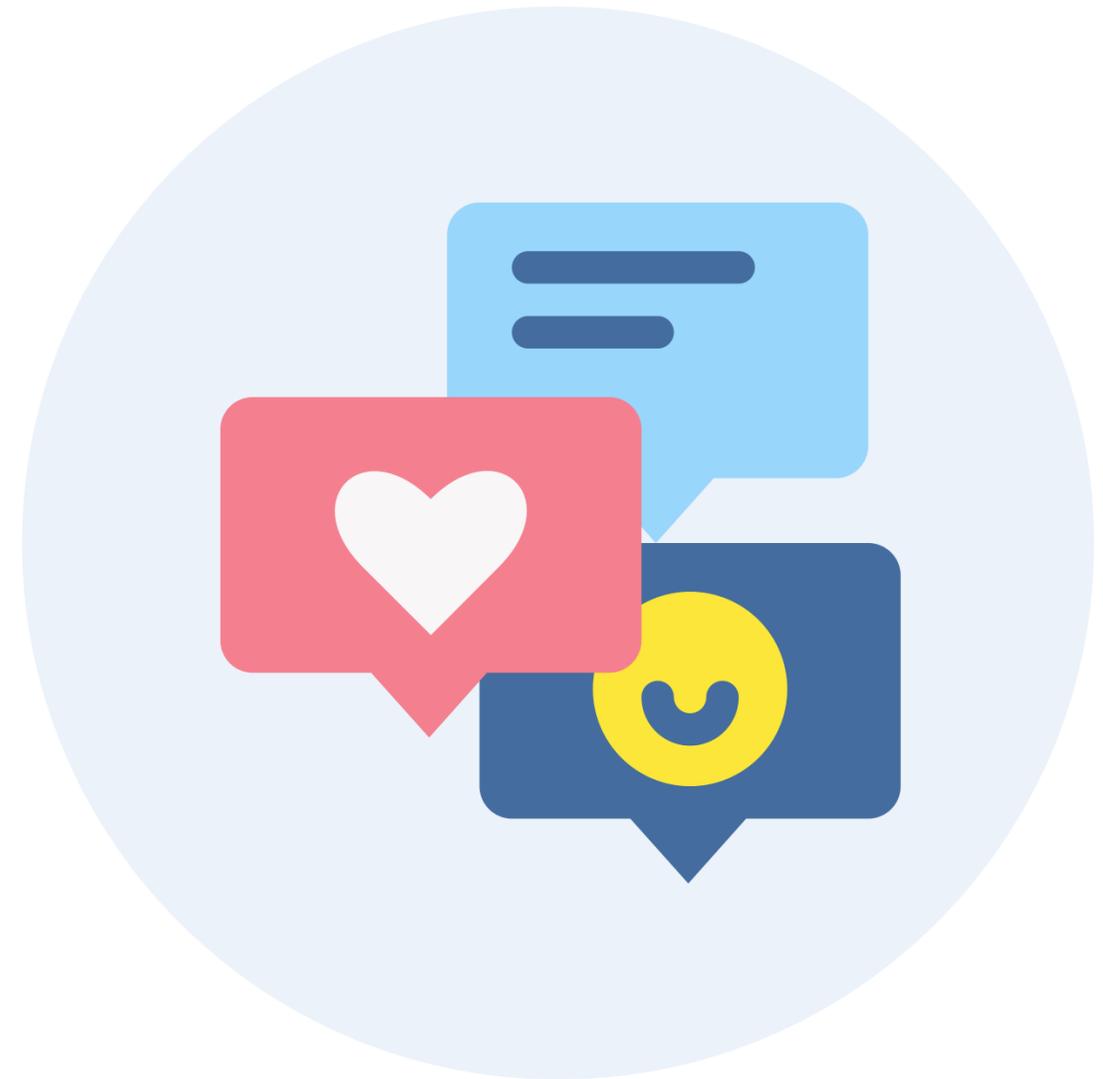


Running Comment Reports

If you're curious to see a detailed report for comments, you can pull this information as a Company Admin from the 'Comments' tab in the Company Admin Portal. This can be useful to see what sorts of buzzwords are trending at your organization, or if particular recognitions are gaining comment traction - perhaps these can be showcased as example recognitions or highlighted for engagement purposes.

[Here is a helpful article on this topic:](#)

[How to Pull a Comments Report](#)



Creating & Assigning Company Roles

Company Roles can be created by your org in order to set specific permissions for either Badges or Reward Catalogs. For example, you may want to set a Company Role of 'CEO' to allow only your CEO to send a special Badge, or you may want to limit a Reward Catalog to a certain location for a specific currency (i.e. United States for US Dollar).

Here are some helpful articles on this topic:

[System Roles and Company Roles Explained](#)

[How to Add Company Roles in Recognize](#)

[How to Set Specific Badge Privileges for a Role](#)



Creating Tags

Tags can be very useful for reporting purposes to see how initiatives are faring across multiple programs. For example, if you've got both a Nomination program and a Social Recognition program for Wellness, you can pull a report to show traction for these if you are using tags at your Company. Tags are optional, and can be turned on or off in the Company Admin Settings.

Here is a helpful article on this topic:

[How to Use Tags](#)



Document Center

The 'Document Center' is where you will be able to download any reports you've run. Likewise, if there are files that need to be uploaded by a Company Admin (i.e. for a Bulk Recognition), this is where they will be uploaded.



Global Settings

As a Company Admin, you will have access to the global settings for your organization under the 'Settings' tab. These settings allow for customization for your user experience, and allow you to turn on/off certain aspects of Recognize for your users. Please let your Customer Success Manager know if you have any specific questions about your organization's settings.



Points Settings

A specific set of settings to call out (since your strategy may change over time) is 'Points Settings.' These settings include default and global badge limits, as well as point settings for sending recognition, receiving a like, and sending a like. This is also where you will find a master setting to hide all mention of points if you're not using them for your programs.

Here is a helpful article on this topic:

[Points Settings Overview](#)

[Default & Global Badge Settings](#)

The screenshot shows the 'Points Settings' page in a web application. The page is titled 'Points' and is part of the 'Company Admin' section. It is divided into two main sections: 'Recognition sending limits' and 'Point values'. The 'Recognition sending limits' section includes a toggle for 'When enabled, will set default setting for receiving notifications from birthdays' (set to ON), a 'Default' section with a 'count' input field and a 'daily' dropdown, and a 'Global' section with a 'count' input field and a 'monthly' dropdown. Below these are 'Save badge limits' and 'Save point settings' buttons. The 'Point values' section includes three input fields: 'Sending a recognition' (30), 'Receiving a like' (20), and 'Sending a like' (10). Each input field has a 'Redeemable?' checkbox, which is checked for all three. To the right of these fields is a 'Hide points for end users' section with a note: 'Note: If rewards are still enabled and badges have points, staff will receive redeemable points for the rewards.' and a toggle set to 'OFF' with the text 'Hide all mentions of points to end users'. The page also features a sidebar with navigation options like 'Dashboard', 'Users', 'Announcements', 'Custom Badges', 'Points', 'Rewards', 'Nominations', 'Tasks', 'Anniversaries', 'Recognitions', 'Comments', 'Roles', 'Tags', and 'Documents'. The 'Settings' option is highlighted in the sidebar. The top navigation bar includes 'Stream', 'Recognize', 'Stats', 'Users', 'Badges', 'Fame', and 'Rewards'. The top right corner shows the user profile 'Beca Caldwell' and a 'Menu' button.

Emails to Look Out For

There are several emails you may get from the Recognize platform as a Company Admin that you'll want to pay attention to, including approval emails, redemption emails, and a monthly recognition summary for your org. [Click here](#) for a full list of what to expect.

Hi there
Initech, Inc.



User671 UserLastName671
redeemed A Company
Sweatshirt

Please approve this reward. Otherwise if you deny it, you may want to email the employee and tell them why.

See them to fulfill the reward. Thank you for being part of the recognition process!

Approve Or Deny

How to Find & Use Recognize's Helpdesk

If you need a step by step guide or tutorial, you have access to Recognize's Helpdesk which includes links to articles, videos, and other resources. If you've got a topic in mind, you can type it into the search bar to find all relevant content. For example, try searching 'Rewards' to pull relevant FAQ articles covering Rewards.

[Link to Recognize's helpdesk](#)

The screenshot shows the Redwood Hospital Recognize Helpdesk interface. At the top, the Redwood Hospital logo is visible. The main heading reads "Hi Beca, We're Here to Help". Below this is a "Getting Started Guide" button and a search bar with the placeholder text "Search here to get answers to your questions." and a search icon. To the left of the search bar is an illustration of two people looking at a laptop, and to the right is an illustration of a person at a computer. Below the search bar is a section titled "Popular Questions" with several clickable links: "Having Trouble Signing In?", "How to Change Personal Notification Preferences?", "How to Locate Reward Redemptions In Recognize?", "Rewards: Deposit Money for Gift Cards?", "How Do Points Work?", "How to Give a User Company Admin Access?", and "View all questions". At the bottom, there is a "Help Links" section with buttons for "Resource Documents", "Videos", "FAQ Overview", "Website Status & Uptime", "Product Updates", and "Articles".