TotalRewards Statement Playbook

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The TotalRewards Statement Playbook guides you through the entire process of implementing your TotalRewards project — from kickoff to launch. Follow these five key stages to ensure a smooth, successful rollout.

**Available for Ultimate licenses only.*

TRB Playbook (PDF)*

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1. Kick Off Call and Timeline

Kick Off Call
Begin by scheduling a call with your designated **Customer Success Manager (CSM)**. During this session, you'll review the portal and discuss:

- Introduction to your TotalRewards project
- Project timeline and milestones
- Initial branding and content ideas
- Compensation and Benefits program setup
- Next steps after the call

Typical Timeline (6–8 weeks total)
Here's what a standard first-year domestic project looks like:

Phase	Duration	Key Activities
Data Collection	2–3 weeks	Gather employee, compensation, and benefits data; set up branding (logo, colors, images, content, SSO, domain verification).
Data Management	1 week	Map and upload data, align files with program names, and perform a preliminary audit.
Data Auditing	2–3 weeks	Validate and refine data, review reports, and obtain final approval.
Launch	1 week	Send launch communications, distribute online access, mail printed statements, and collect feedback.

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2. Branding and Content

Branding ensures your statement reflects your company’s look and feel. Confirm whether to use the **default TRB branding** or provide your own materials.

Provide the following items (if applicable):

- **Primary color:** Send the HTML color code or your brand guide.
- **Logo:** Transparent background (PNG, JPEG, or GIF).
- **Executive photo & signature:** For inclusion in the welcome letter.
- **Banner image:** Appears at the top of each page (online statement).
- **Side image:** Appears on the side of each page or on the print/PDF welcome page.
- **Content:** Submit welcome letters, introductions, footers, footnotes, and disclaimers in Word format.
- **Email Templates:** Review and edit pre-launch, go-live, and reminder emails.
- **Survey Template:** Review or update default questions (Scale 1–5 or Yes/No).

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3. Data Management

This step ensures your employee data is correctly mapped and formatted for upload.

Data Requirements:

- Provide a roster of all employees receiving a statement.
- Use Excel format with a unique numeric Employee ID (not SSN).\
- Maintain consistent IDs across all files.
- Send data through the **secure data portal** or your preferred transfer method.

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4. Statement Audit

The audit phase ensures data accuracy and compliance before launch.

What Happens:

- Data files are merged and annualized using unique employee IDs.
- A high-level audit is performed within the application.
- TRS provides an **Audit Best Practices Form** for your review.
- Final approval and signed **Audit Approval Form** are required before launch.

> ⚠ Any data changes after approval may incur additional fees.

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5. Launch

In the final stage, your TotalRewards statements are distributed to employees.

Delivery Options:

1. **Secure Online Statement** – Employees access their statements via a unique link or **Single Sign-On (SSO)**.
2. **Printable PDF Statement** – Printed and mailed, either by your team or by **TotalRewards Software (TRS)** on your behalf.

This phase also includes employee communications, reminders, and optional post-launch surveys to gather feedback.

Summary

Stage	Key Outcome
Kick Off & Timeline	Project plan and milestones established
Branding & Content	Visual identity and communication templates approved
Data Management	Employee and compensation data mapped and uploaded
Statement Audit	Data verified, approved, and ready for release
Launch	Statements delivered securely to employees

Need help?
If you have questions about any of the steps above, contact your **Customer Success Manager** or visit the Secure File Transfer Guide for details on sending files safely.
