

CLEAR REVIEW

# System Notifications

Email workflows and content

**Abi Cattier**

10/04/24



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# 1. Introduction

Below is a summary of email workflows sent by the system and the content of the emails. Note that all system emails are sent from messenger@clearreview.com.

## 2. User management

Action triggering email	Email sent to	Email subject	Email content
<p><b>New employee is added or imported into to the system (does not apply to single sign-on customers)</b></p> <p><b>If user invitation is not activated, 3 reminders are sent: after 1 week, after another 2 weeks, and after another 4 weeks.</b></p>	Employee	Set up your Clear Review account	<p>Employee First Name],</p> <p>[Name of person who added the employee] has given you access to [Organisation Name]'s performance and development system called Clear Review. Please set your password by clicking [link to set password]</p> <p>Once you have set your password, you can access Clear Review at any time by clicking the link below:  <a href="https://app.clearreview.com/webapp/">https://app.clearreview.com/webapp/</a>            (https://app.clearreview.com/webapp/)            (We suggest that you bookmark this link so you can easily access Clear Review in future.)</p> <p>Your email address for logging into the system is [Employee Email Address]</p>

<p><b>User clicks Forgotten Password and requests a password reset (does not apply to single sign-on customers)</b></p>	<p>User</p>	<p>Password reset on app.clearreview.com</p>	<p>User First Name],</p> <p>You're receiving this because you requested a password reset for your user account at Clear Review.</p> <p>Please <a href="#">click here</a> to go to the following page and enter a new password.</p>
<p><b>User is assigned as an approver of an Administrator, by the same Administrator</b></p>	<p>Administrator's approver</p>	<p>You can now access [full name's] records</p>	<p>Manager First Name],</p> <p>[Administrator Full Name] has given you access to [his/her] Objectives, Feedback, Conversations and Actions which you can see on your Team page. You can now have Conversations with [Administrator First Name] and add and approve [his/her] Objectives. <a href="#">Go to your Team page</a></p>

### 3. Objectives

Action triggering email	Email sent to	Email subject	Email content
<p><b>Employee sends new or changed objectives for approval</b></p>	<p>Employee's approver</p>	<p>Employee Name]'s objectives need your approval</p>	<p>[Approver First Name],</p> <p>[Employee Name] has sent you a request to approve [his/her] objectives.</p> <p><u><a href="#">Click here to view and approve them.</a></u></p> <p>Note that you are able to make changes to [Employee Name]'s proposed objectives before approving them</p>
<p><b>Approver approves employee's objectives</b></p>	<p>Employee</p>	<p>Your objectives have been approved</p>	<p>[Employee First Name],</p> <p>[Approver Name] has approved your objectives.</p> <p>Please note that [Approver First Name] may have made some changes to your objectives prior to approving them so you are recommended to review them.</p> <p><u><a href="#">Click here</a></u> to view them.</p>
<p><b>Approver has not approved objectives awaiting their approval</b></p>	<p>Employee's approver</p>	<p>Reminder: Objectives awaiting your approval</p>	<p>[Approver First Name],</p> <p>This is a reminder that the following team member[s] sent you objectives which are still awaiting your approval.</p> <p>Click [each name] to view and approve the objectives:</p> <p>[Employee Full Name][Employee Full Name]</p>

<b>Manager adds an Objective</b>	Employee	A new Objective has been added for you	<p>[Employee First Name],</p> <p>[Manager Full Name] has added a new Objective for you.</p> <p><a href="#">View the Objective here</a></p>
<b>Manager adds a Team-Wide objective</b>	All directteam members	You have been assigned a new Objective	<p>Employee First Name],</p> <p>[Manager Full Name] has assigned a new Objective to you which can be viewed on your Objectives page.</p> <p><a href="#">View the Objective here</a></p>
<b>User has an objective(s) due for completion in the nexttwo weeks</b>	Employee	You have [an objective / objectives] due for completion soon	<p>Employee First Name]</p> <p>This is a reminder that the following [objective is /objectives are] due to becompleted soon:</p> <p>[Objective description]Due: [due date]</p> <p><a href="#">Click here</a> to view your objectives</p>
<b>Manager adds a comment to a user's objective</b>	Employee	[Manager name] hascommented on yourobjective	<p>[Employee First Name]</p> <p>[Manager full name] has commented onone of your Objectives.</p> <p><a href="#">Read the comment here.</a></p>

## 4. Actions

Action triggering email	Email sent to	Email subject	Email content
<p><b>User has incomplete actions due in the forthcoming week (email sent on a Sunday)</b></p>	<p>Owner of action</p>	<p>You have [an action/actions] due this week</p>	<p>[Action owner First Name],</p> <p>You agreed to do the following [action/s] by this week but [it has / they have] not yet been marked as done in Clear Review:</p> <p>[due date]: [Action]</p> <p>You can view your actions and mark them as done on your <a href="#">Actions page</a>.</p>



## 5. Feedback

Action triggering email	Email sent to	Email subject	Email content
<b>User receives some feedback</b>	Feedback recipient	You're received some feedback	<p>[Feedback recipient First Name], [Full name of user who gave the feedback] has given you some feedback.</p> <p>View the feedback on your <a href="#">Feedbackpage</a>.</p>
<b>User requests feedback (internally)</b>	Feedback request recipient(s)	[Requestor Name]has requested feedback from you	<p>[Feedback request recipient First Name], [Requestor full name] has requested feedback from you about "[Feedbackrequest subject]".</p> <p>You can respond to this request on yourfeedback page.</p>
<b>User requests feedback (externally)</b>	Feedback request recipient(s)	[Requestor Name] would like your feedback	<p>[Feedback request recipient First Name], [Requestor full name (requestor email address)] has requested feedback from you about: "[Feedback request subject]"</p> <p>To respond to this feedback request, please click on the secure link below:<a href="#">[Link]</a></p> <p>Why am I receiving this? [Company name] is using a secure</p>

			<p>employee feedback system called Clear Review to enable its employees to request feedback to support their personal development. If you have any questions about this feedback request, please contact [Requestor Full Name]</p>
<p><b>User sends thanks for feedback</b></p>	<p>Feedbackgiver</p>	<p>[Recipient name] says thanks</p>	<p>[Feedback giver First Name],</p> <p>[Feedback recipient full name] has thanked you for <u>your feedback</u>.</p> <p>[Feedback recipient's first name] added this message:</p> <p>[Personal message from recipient]</p>
<p><b>User selects to ignore a request for feedback and sends optional message. If an optional message is not sent, clicking Ignore will not generate a notification</b></p>	<p>Requester of feedback</p>	<p>[Feedback request recipient's first name] sent you a message about your Feedback request.</p>	<p>[Requester of feedback's first name],</p> <p>[Feedback request recipient's first name] has sent you a personal message about your Feedback request:</p> <p>"[Feedback request subject]"</p> <p>[Feedback request recipient's first name] added this message:</p> <p>[Personal message from feedback request recipient]</p>

<p><b>User has not given or received any feedback in the last 4 weeks</b></p>	<p>Employee</p>	<p>Got a minute for some feedback?</p>	<p>[Employee First Name],</p> <p>Regular feedback is an important part of everyone's development and it's been a while since you gave or received some. Not to worry, you can do it now in less than a minute:</p> <p><a href="#">Give some feedback Request some feedback</a></p> <p>You can access your feedback page anytime.</p> <p><a href="#">Turn off</a> this notification.</p>
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## 6. Check Ins

Action triggering email	Email sent to	Email subject	Email content
<p><b>User adds a check-in for a later date/time A calendar invitation is sent with this email which automatically adds the check-in to the user's calendar.</b></p>	<p>Other participant in Check-in</p>	<p>Meeting invitation: Check-in [employee full name] &amp; [manager full name]</p>	<p>[Organiser full name] has invited you to a Check-in and it has been added to your calendar.</p> <p>You can add notes and actions to the Check-in here: [link to Check-in record]</p> <p>[Attached calendar invitation showing date and time of meeting]</p>

<p><b>User adds a check-in for a later date/time A calendar invitation is sent with this email to the users.</b></p>	<p>Check-in organiser</p>	<p>Meeting confirmation: Check-in [employee full name] &amp; [manager full name]</p>	<p>Your Check-in with [other attendee full name] has been created. An invitation has also been sent to [other attendee first name].</p> <p>You can add notes and actions to the Check-in here:</p> <p>[link to Check-in record]</p> <p>If you need to change or cancel this Check-in, please do so in Clear Review rather than in your calendar. Changes made in your calendar won't be updated in Clear Review or in [other attendee first name]'s calendar.</p> <p>[Attached calendar invitation showing date and time of meeting]</p>
<p><b>User changes the date and time of a later check-in</b></p>	<p>Both participants</p>	<p>Updated versions of the above two emails are sent to the participants which will automatically update their calendar entries.</p>	
<p><b>A check-in scheduled for a later date is removed A calendar invitation update is sent with this email removing it from the user's calendar</b></p>	<p>Both participants</p>	<p>Cancelled: Check-in [employee full name] &amp; [manager full name]</p>	<p>Your Check-in meeting with [other attendee] scheduled has been cancelled and removed from your calendar. [Attached calendar entry showing date of cancelled meeting]</p>

<p><b>User has not had a check-in for [x] weeks</b></p>	<p>Employee</p>	<p>You are due for aCheck-in meeting</p>	<p>[Employee First Name],</p> <p>It's time to arrange a Check-in meeting with [Manager full name]. You should behaving a Check-in meeting with [Manager first name] at least every 12 weeks.</p> <p>Before the meeting, remember to updateyour progress against your objectives <a href="#">here</a>.</p> <p>When you hold your meeting, please ensure that you or [Manager first name]create a Check-in Meeting record and capture any arising actions and notes <a href="#">here</a>.</p>
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## 7. Managers

Action triggering email	Email sent to	Email subject	Email content
<p><b>Weekly team update sent out on Fridays at 07:00 UTC</b>  <b>Note this email is not sent until the manager has existed in the system for at least 4 weeks</b></p>	<p>Managers</p>	<p>Your weekly team update</p>	<p>[Manager First Name],</p> <p>Here are the important things you need to know about your team from the last week...</p> <p>[Team member full name]</p> <ul style="list-style-type: none"> <li>• [Flags if the team member is due for a check-in, needs feedback or has no objectives]</li> <li>• [Summarises useful updates from the last 7 days such as feedback received, objectives updated etc.]</li> </ul> <p>[Team member full name] etc...<a href="#">Turn off</a> this notification.</p>

## 8. Talent Snapshots

Action triggering email	Email sent to	Email subject	Email content
<p><b>Administrator asks Managers to complete their Talent Snapshots</b>  <b>Note the Administrator can customise the first paragraph of this email.</b></p>	<p>Managers</p>	<p>Please complete your Talent Snapshot</p>	<p>[Manager First Name],</p> <p>It's time for us to collect the views of our managers on their team members' performance and development. So we need you, as a manager, to consider each of your team members in turn and answer some questions about them.</p> <p>To answer the questions:</p> <ol style="list-style-type: none"> <li>1. Go to the <u>Your Team</u> page in ClearReview</li> <li>2. Click the Show Talent Snapshots button at the top of the page</li> </ol> <p>Answer each question for each of your team members</p>



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