CLEAR REVIEW

System Notifications

Email workflows and content

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Disclaimer

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
New employee is added or imported into to the system (does not apply to single sign-on customers) **If user invitation is not activated, 3 reminders are sent: after 1 week, after another 2 weeks, and after another 4 weeks.**	Employee	Set up your Clear Review account	Employee First Name], [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] Once you have set your password, you can access Clear Review at any time by clicking the link below: https://app.clearreview.com/webapp/ (https://app.clearreview.com/webapp/) (We suggest that you bookmark this link so you can easily access Clear Review in future.) Your email address for logging into the system is [Employee Email Address]

User clicks Forgotten Password and requestsa password reset (doesnot apply to single sign-on customers)	User	Password reset on app.clearreview.com	User First Name], You're receiving this because you requested a password reset for your useraccount at Clear Review. Please <u>click here</u> to go to the following page and enter a new password.
User is assigned as an approver of an Administrator, by thesame Administrator	Administrator's approver	You can now access [full name's] records	Manager First Name], [Administrator Full Name] has given youaccess 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 andapprove [his/her] Objectives. <u>Go to yourTeam page</u>

3. Objectives

Action triggering email	Email sent to	Email subject	Email content
Employee sends new or changed objectivesfor approval	Employee's approver	Employee Name]'s objectives need yourapproval	[Approver First Name], [Employee Name] has sent you a requestto approve [his/her] objectives. Click here to view and approve them. Note that you are able to make changes to[Employee Name]'s proposed objectives before approving them
Approver approves employee's objectives	Employee	Your objectives have been approved	[Employee First Name], [Approver Name] has approved yourobjectives. Please note that [Approver First Name] may have made some changes to your objectives prior to approving them so youare recommended to review them. Click here to view them.
Approver has not approved objectives awaiting their approval	Employee's approver	Reminder: Objectives awaiting your approval	[Approver First Name], This is a reminder that the following teammember[s] sent you objectives which are still awaiting your approval. Click [each name] to view and approvethe objectives: [Employee Full Name][Employee Full Name]

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

4. Actions

Action triggering email	Email sent to	Email subject	Email content
User has incomplete actions due in the forthcoming week (email sent on a Sunday)	Owner of action	You have [an action/actions] due this week	[Action owner First Name], 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: [due date]: [Action] You can view your actions and mark themas done on your Actions page.

5. Feedback

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

			employee feedback system called Clear Review to enable its employees to requestfeedback to support their personal development. If you have any questions about this feedback request, please contact[Requestor Full Name]
User sends thanks for feedback	Feedbackgiver	[Recipient name]says thanks	[Feedback giver First Name], [Feedback recipient full name] hasthanked you for <u>your feedback.</u> [Feedback recipient's first name] addedthis message: [Personal message from recipient]
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	Requester of feedback	[Feedback request recipient's first name] sent you a message about your Feedback request.	[Requester of feedback's first name], [Feedback request recipient's first name]has sent you a personal message about your Feedback request: "[Feedback request subject]" [Feedback request recipient's first name]added this message: [Personal message from feedback requestrecipient]

| User has not given or received any feedbackin the last 4 weeks | Employee | Got a minute for some feedback? | [Employee First Name],

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:

Give some feedback Request

some feedback

 You can access your feedback page atanytime.

Turn off this notification. |

6. Check Ins

Action triggeringemail	Email sent to	Email subject	Email content
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.	Other participant inCheck-in	Meeting invitation: Check-in [employee full name] & [manager full name]	[Organiser full name] has invited you to aCheck-in and it has been added to your calendar. You can add notes and actions to the Check-in here: [link to Check-in record] [Attached calendar invitation showingdate and time of meeting]

User adds a check-in for a later date/time A calendar invitation is sent with this email to the users.	Check-in organiser	Meeting confirmation: Check-in [employee full name] & [manager full name]	Your Check-in with [other attendee full name] has been created. An invitation hasalso been sent to [other attendee first name]. You can add notes and actions to the Check-in here: [link to Check-in record] 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 firstname]'s calendar. [Attached calendar invitation showingdate and time of meeting]
User changes the dateand time of a later check-in	Both participants	Updated versions of the above two emails are sent to the participants which will automatically updatetheir calendar entries.	
A check-in scheduledfor a later date is removed A calendar invitation update is sent with this email removing it from the user's calendar	Both participants	Cancelled: Check-in [employee full name] & [manager full name]	Your Check-in meeting with [other attendee] scheduled has been cancelled and removed from your calendar. [Attached calendar entry showing date ofcancelled meeting]

User has not had a check-in for [x] weeks	Employee	You are due for aCheck-in meeting	[Employee First Name], 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. Before the meeting, remember to updateyour progress against your objectives here. 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 here.

7. Managers

Action triggering email	Email sent to	Email subject	Email content
Weekly team update sent out on Fridays at07:00 UTC Note this email is not sent untilthe manager has existed in the system for at least 4 weeks	Managers	Your weekly team update	[Manager First Name], Here are the important things you needto know about your team from the last week... [Team member full name] • [Flags if the team member is due for a check-in, needs feedback orhas no objectives] • [Summarises useful updates fromthe last 7 days such as feedback received, objectives updated etc.] [Team member full name] etc...Turn off this notification.

8. Talent Snapshots

Action triggering email	Email sent to	Email subject	Email content
Administrator asks Managers to complete their Talent Snapshots Note the Administrator can customise the first paragraph of this email.	Managers	Please complete your Talent Snapshot	[Manager First Name], It's time for us to collect the views of ourmanagers on their team members' performance and development. So we need you, as a manager, to consider each of your team members in turn and answersome questions about them. To answer the questions: 1. Go to the <u>Your Team</u> page in ClearReview 2. Click the Show Talent Snapshotsbutton at the top of the page Answer each question for each of your team members

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