

Creating a Challenge

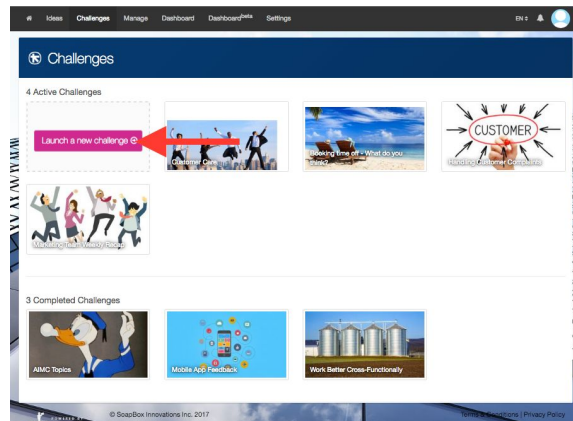
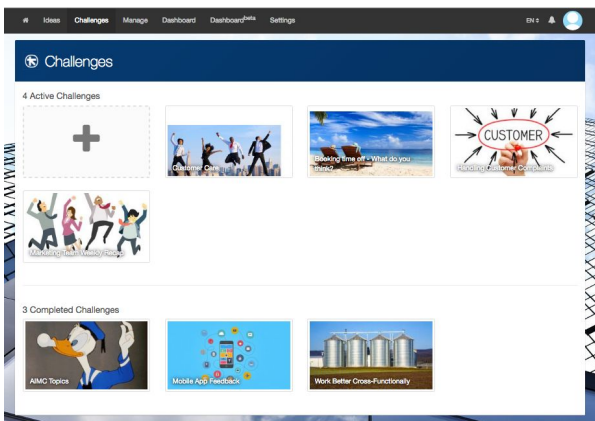
Challenges are a great way to have a focused conversation around a specific project, initiative or issue.

Who can set up a challenge?

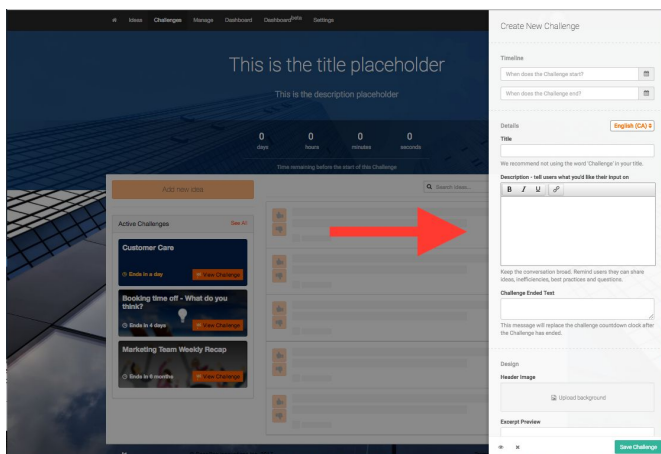
Anyone with 'Moderator' (i.e. Innovation Partners), 'Owner' (ie. Program Managers) and 'Administrator' permissions in SoapBox can launch a Challenge. If you're not sure what your permission level is, contact your Program Manager for assistance.

Here are a few things to remember before you begin:

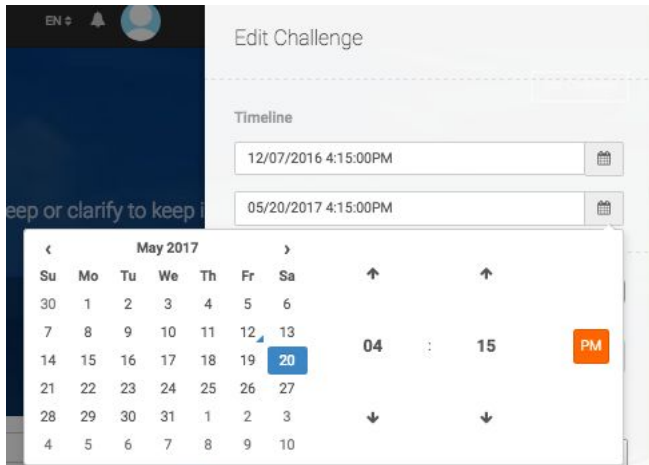
1. Program managers are able to bundle Challenge ideas together. **Note:** *Only ideas within the challenge can be bundled together.*
2. All ideas submitted to challenges that you are a part of will be visible on the Homepage.
3. All admins, including Innovation partners can see all ideas from all challenges created on the Manage page.



To create a challenge, hover over the “+” sign and click “Launch a new challenge”. A new challenge page will open and a modal will pop out on the right side of your screen.



Timeline



Enter the start time, end time, and date of your challenge. Your challenge will not be visible until the start time. Once the challenge is over, members who can see the challenge can no longer vote or share ideas, however they can still view and comment on existing ideas.

Note: The displayed time is in the Program Manager's local time zone. Adjust launch time accordingly for Challenges that run across different time zones

Details

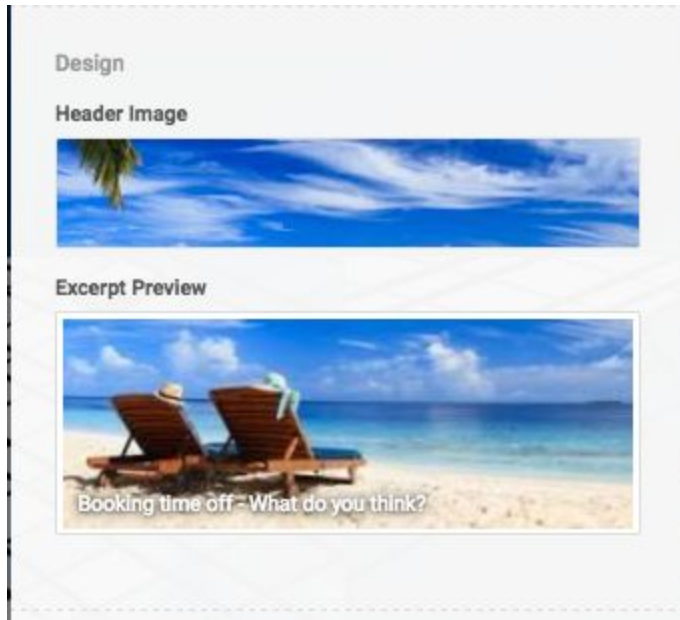
The image shows a screenshot of the 'Details' form for a challenge. At the top, there's a language selector 'English (CA)'. Below it, the 'Title' field contains 'Booking time off - What do you think?'. A note below the title says 'We recommend not using the word 'Challenge' in your title.' The 'Description' field contains 'Now that we have a new process of booking and tracking vacation days, we want to know if it's working for you! What can we start, stop, keep or clarify to keep improving our process?'. Below the description, there's a note: 'Keep the conversation broad. Remind users they can share ideas, inefficiencies, best practices and questions.' The 'Challenge Ended Text' field contains 'The Challenge is now closed. Stay tuned for more details and thank you for participating!'. A note below this field says 'This message will replace the challenge countdown clock after the Challenge has ended.'

Title: Enter a clear title and let your audience know what type of ideas you are looking for. Keep in mind that SoapBox automatically ends your title with the word "Challenge" in all notifications, so you do not need to include it.

Description: Character limit is 255. If you are using Chrome as your browser, you can lightly format the text (bold, italicize, underline, and hyperlink).

Challenge Ending Text: Write a message that will replace the countdown clock when your Challenge ends.

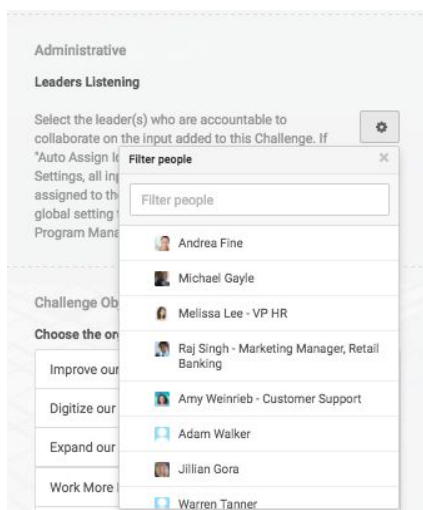
Design



Header Image: The recommended image size is 1280x726 pixels. It is also recommended that in order to optimize the image for both a laptop and large monitor screen, it is best to choose a patterned image with no specific focal point.

Excerpt Preview: This shows you what your Challenge tile will look like on the main Challenges tab.

Administrative



Select those the leaders you'd want to be notified about the ideas submitted to the challenge.

Challenge Objective

Challenge Objective

Choose the organizational objective this Challenge relates to.

Improve our Training and Mentorship Opportunities
Digitize our Bank
Expand our Products and Services
Work More Effectively
Delight the Customer

All input from this Challenge will be categorized under the chosen objective. If no objective is selected, users will have to pick an objective from this list each time they add input to the Challenge.

You can choose the default objective for your Challenge. If no objective is chosen, users will have to pick an objective from this list each time they add input to the Challenge.

Challenge Scopes

Challenge Scopes

Which organizational group will be reviewing input from this Challenge?

Department ▲

Search

Global Asset Management
HQ
✓ Human Resources
Information Technology
Marketing
Sales

Line of Business ▲

Commercial Banking
✓ Investments
Retail Banking

If no group is selected, users will have to pick a group from this list each time they add input to the Challenge.

Users from all groups selected will be able to review input from the challenge. (e.g. All users from Human Resources, and all users from Investments).

Privacy

Privacy

Limit Access
Challenges are open to the whole community by default. If you limit access you must invite specific groups or individuals below. YES

Invite via Groups (A)
Select the groups who will have access from the list below.
Note: email invites will only be sent to those who currently have a SoapBox account.

Department

Search

Branch Support

Centralized Services

Customer Service

Global Asset Management

HQ

Human Resources

Line of Business

Commercial Banking

Investments

Retail Banking

Invite via Email (B)
List the email addresses you'd like to send invites to, and separate each one by a comma or a space. Note: email invites can be sent to those with or without a SoapBox account.

Invite via CSV (C)
Upload a CSV that contains the list of people you'd like to invite to the Challenge. One field must be a unique identifier such as an email address, or the custom field you use to identify users (e.g. employee ID). Note: you must upload the same CSV twice. The first time, select 'email' to import the email addresses. Then upload the CSV again and select your unique identifier column. This will ensure non-registered users receive the email invitation.

Manage Invitations (D)
View, search, and remove invitations to users you have already invited.

Limit Access: you can enable this to change your challenge from public to private. Once Private, Program Managers will be able to limit access three ways:

1. **Invite via Groups (Custom Fields) (A):** Will be sent to all users in each group chosen. Only users with a registered SoapBox account will receive the invitation. **Note:** If you invite a user via Email Address after the challenge has launched, they will still receive an invitation email.
2. **Invite via Email Address (B):** enter an email address for each person you'd like to invite. Employees with or without registered SoapBox accounts will receive the invitation.
3. **Uploaded CSV (C):** upload a CSV that contains a unique identifier for each invitee. Employees with or without registered SoapBox accounts will receive the invitation. **Note:** If you invite a user via Email Address after the challenge has launched, they will still receive an invitation email.

Manage Invitations(D): See, add or remove invited users.

Notifications

The screenshot shows a 'Notifications' settings panel with five sections, each with a description and a toggle switch:

- Prelaunch Notification:** Send a prelaunch notification 24 hours before the Challenge launches. Toggle: YES (checked).
- Launch Notification:** Send a launch notification email when the Challenge starts to all users who have access to the Challenge. Toggle: NO.
- Ending Soon Notification:** Send an ending soon notification 24 hours before the Challenge ends. Toggle: NO.
- Leader Recap Notification:** Send leaders an email with Challenge highlights once the Challenge has ended. Toggle: YES (checked).
- User Recap Notification:** Once the Challenge ends, a button will appear in the top right corner of the Challenge page. Click it to send an email with Challenge highlights to all invited users.

Select the type of notifications you want to go out to your community. If you extend the Challenge after it has already launched, any scheduled notifications that have already gone out, will not go out again (e.g. Ending Soon Notification). Also, if any new users are added to the challenge after any of the scheduled notifications have gone out, they will not receive any of those notifications.

Note: 'Ending Soon Notification' option will not show if your challenge is shorter than 24 hours.

See chart below for more details on notifications.

Other Actions (?)



Preview your Challenge (E)

Close modal without saving (F)

Delete your Challenge (G) **Note:** You cannot retrieve your challenge and any inputs shared once deleted.

Save your Challenge (H) **Note:** your challenge won't launch until the official start date.

Challenge Notifications

Notification	Content	Who Receives It	When it Goes Out	Special Notes
Prelaunch Notification	<ul style="list-style-type: none"> Title and description When it starts and ends How it works Link back to default page 	<ul style="list-style-type: none"> All users who have access to the Challenge All Program Managers Any individuals selected as Leaders Listening 	24 hours before the start of the Challenge	If the Challenge starts in less than 24 hours from the time it is saved then this notification does not go out.
Launch Notification	<ul style="list-style-type: none"> Title and description When it ends Call-to-action to join How it works Leaders Listening (Innovation Partners and/or Program Managers) 	<ul style="list-style-type: none"> All users who have access to the Challenge All Program Managers Any individuals selected as Leaders Listening 	When the Challenge starts	<p>There are four spots for pictures of leaders listening (no names). If there are more than four Leaders Listening, the four pictures will display followed by "..." to indicate more are listening.</p> <p>If the start time is pushed back after the challenge has already launched, another launch notification will not go out.</p>
Ending Soon Notification	<ul style="list-style-type: none"> Title and description When it ends Three ideas from the Challenge Link to the Challenge Leaders Listening 	<ul style="list-style-type: none"> All users who have access to the Challenge All Program Managers Any individuals selected as Leaders Listening 	24 hours before the Challenge is set to end	<p>Ideas selected come from the list of the top voted and most debated. Users who have not joined the Challenge will not see the ideas.</p> <p>If your Challenge ends within 24 hours, this notification does not go out.</p> <p>If you extend the challenge after it has already launched, this notification will not go out again.</p>
Admin Recap Notification	<ul style="list-style-type: none"> Title and description Link to view Challenge Ideas Challenge stats (ideas, votes, participants) Indication of what happens to ideas 	<ul style="list-style-type: none"> Challenge creator All Program Managers Any individuals selected as Leaders Listening 	When the challenge ends	This email will look similar to regular newsletters however only show Challenge ideas.
User Recap Notification	<ul style="list-style-type: none"> Title and description Link to view Challenge ideas Challenge stats (ideas, votes, participants) Indication of what happens to ideas 	<ul style="list-style-type: none"> All users who have access the challenge and are registered 	When the challenge ends	Must be enabled after the challenge ends by Program Manager who created the Challenge.