# xink

Initial Implementation Plan

Welcome to XINK

This guide will give you an idea of the general timeline and steps to go through when setting up Xink in your company. It is based on 10+ years of experience with cloud-based setup across all types and sizes of business.

We hope this gives you some frame of mind on what we typically see.

Full support and knowledgebase

Xink provides support for every step of the implementation process via live chat, onboarding 1:1 sessions and phone calls. Our extensive Help Center is a go-to for most topics related to email signature management and the set-up. It provides you with more than 5,000 articles, guides and helpful eBooks

https://support.xink.io/
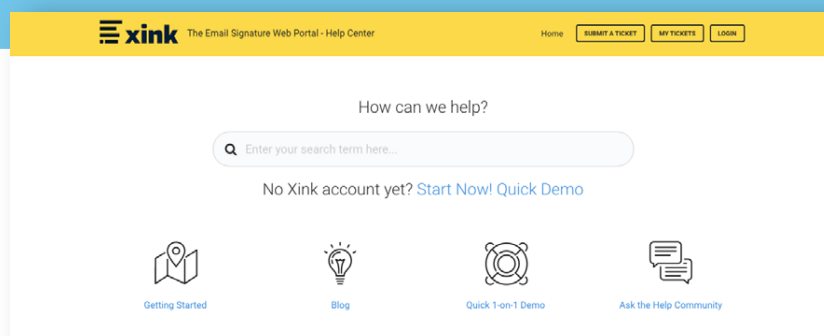
Timeline

The actual roll-out can really vary across the board. For a company with +1000 employees, an estimate of minimum 2 weeks would be fair. Obviously, this is fluid and things can move faster/slower depending on your company and resources.

Gather the stakeholders

We recommend starting the process with getting the relevant stakeholders together, this is usually representatives from management, IT, HR and Marketing/Communications.

Management is interested in knowing the costs, the value, the timeframe and to oversee the right responsible persons are appointed etc.

IT wants to know what technical issues they should be aware of, and how they need to be involved. They also have the knowledge of where the employee data is held (Active Directory or other data source).

HR are already responsible for updating the HR system when employees come and go so they need to know about the sync to the HR system and what happens to an employee's email signature when they update contact details, titles, addresses etc.

Marketing/Communications have a great stake in the project as they want to streamline the branding efforts across the company and (perhaps) add email signatures as a new channel for news, branding campaigns, marketing deals etc. They are also responsible for the design of the signatures and to provide the needed graphic content to upload to Xink. Usually the task of managing the content of email signatures sits well in this department.

The design process can be quite detailed as many questions need to be answered. Perhaps you need different designs for different employee groups, departments, or countries? Most likely, you want different signatures for reply/forward emails. How should the signature look across devices? Do you want to include links, social media icons, campaigns, logos, pictures of employees etc.? Read about the different things to consider right here.

When the relevant stakeholders have been heard, the next step is to delegate and perform the tasks. Below we will go over the process in further detail.

The three important pieces are: **Signature/Campaign creation, Employee Info and Signature Roll-out.**

Signature Design Setup

The time needed for this stage depends on where you are within the design process. If you already have a corporate approved signature to use, it's easy to build in Xink. The Xink team can also help you build it in a couple days.
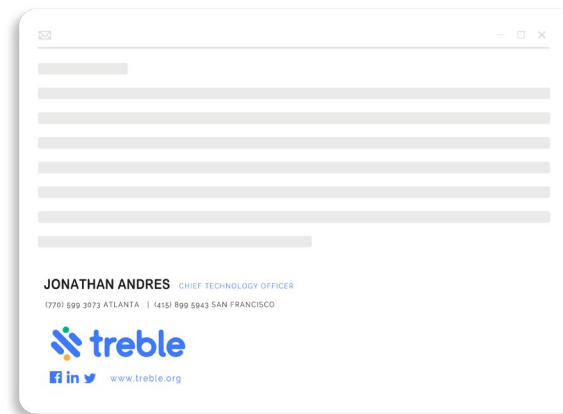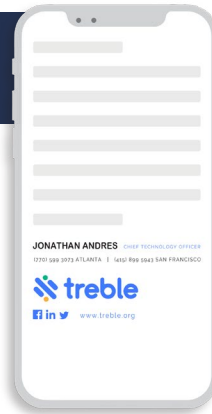
✉ **Think about the different signature designs you'll need and the variations that will be needed for different teams** – what rules will need to be set (different layouts/designs for different countries? Signatures for different departments?). Some teams start off with one simple Global Template and then build different variations off that.

✉ **Identify specific font choices, images to be used (?), social media icons, styling etc.** (It's fairly easy to use our editor to build on your own but we have a design team that can help you build these during on-boarding)

✉ **Would you want different signatures for Reply/Forward? Do you want to provide optional signatures to allow users to choose between?**

✉ **For campaigns, if only a segment of users will be displaying** – ensure we have proper field information to identify whom those will be

✉ **There are not too many limitations on images used in sig/campaigns** – we simply encourage all photos to be scaled 100% true to size & under about 320px wide
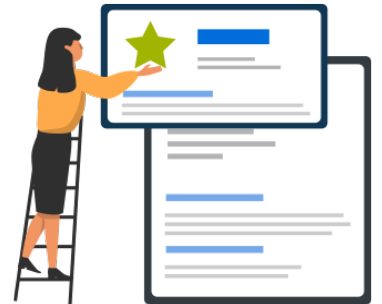
Pulling in Employee Info

Xink pulls in data from your Azure AD/Active Directory/Google Directory etc. The sync generally can be done in a couple hours after IT sets up the integration. It is valuable for Marketing to work together with IT at this stage to make sure IT includes all the required fields in the email signatures. At this stage, it is also important to determine which fields to allow as customizable by the users.

✉ In the set-up phase, we would like to highlight these important pieces:

● Pull in employee info using ADExport tool (on-premises environments), Azure AD (Office 365 environments) or Google Directory (G Suite environments)

✉ Setting up the sync for employee data:

● Which fields will you need to pull in the system (Names, Titles, Phone Numbers, etc.)? Think about not only the fields that will be displayed in the signature, but also fields that could help you segment groups (i.e. Departments)

● Will you need to pull in custom fields? (Guide for IT here)

● Which fields do you want to allow end-users customization to (First Name? Title? etc.?) You can even go as far as allowing employees to decide whether they want to display fields like Mobile number in their signature. (Normally this takes 1-2 days)

Signature Roll-Out

FOR **OUTLOOK** USERS

Ideally, you'd have all your employees in Xink & signatures created before moving on to Signature/App Rollout phase. Most of this rests with IT. Our recommendation is generally to test first with a small group of users before doing a full roll-out. You could gather a group of 5-10 folks and they would be the initial test users to ensure employee data, sig design/changes etc. are all coming through prior to full roll-out. Ideally test with them for a week or so before pushing out to entire team (7-14 days).
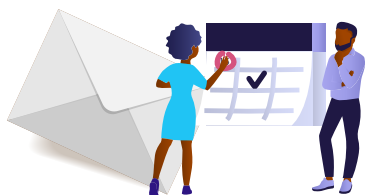
The roll-out involves:

Deploying the Xink MSI-package unattended

Think about how you'll want to deploy to your users – some clients do a full roll-out whereas other dues to a tiered approach (dept. by dept. or location by location, etc.) Whatever your normal software sellout practices are would be recommended

Do you want to enable "Delete All" capability to remove existing signatures from users' machines?

Let your employees know about the upcoming launch

One other piece that some clients do is send out a global email announcing the use of Xink a few days prior to launch. This just lets them know that in a few days, they'll see a new tool on their machine that allows Marketing to standardize branding and run campaigns.

If you'll be choosing to DELETE ALL existing signatures (not required), this would be a good time to let them know what to expect.

GET CONTROL.
GET XINK.