# Topgrading Snapshot ™
# Administrative User's Manual & Tutorial

**June 9, 2011**

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# The Topgrading Snapshot™ - A Quick Overview

Every employer wants to hire only the best possible candidates who have great skills and work habits, get along well with others and have proven records of success. In addition, every employer wants to be sure they are learning the truth about the backgrounds of the people they are hiring. The Topgrading Snapshot™ is designed to make that dream into a reality by walking your candidates through the Topgrading Career History Form, a document that can become your organization's application form.

This form is very special because it contains a built-in "truth serum", which assures you that you are receiving truthful and complete answers about the questions that are vital to hiring the best candidates. The details below will enable you to fully utilize all of the features built into the industry's best online hiring tool such as:

- **The Candidate Report**

This report lists details for all of the candidates that have actually started or completed their Career History Form. Candidates appear on this form when they have accepted your email and logged in with the username and password they received via email as part of the signup process. This report allows you to access the data in a candidate's Career History Form and their Topgrading Snapshot™.

- **Emailing Your Candidates**

This is where you'll create and send emails to prospective candidates inviting them to complete the Career History Form that produces the Topgrading Snapshot.

- **The Save Audit Report**

This allows you to track the actual progression of entries a candidate makes into their Career History Form.

- **The Email Report**

This allows you track the emails you've sent to prospective candidates.

- **The Topgrading Snapshot™**

Of course this is the **REAL PAYOFF** – a complete "at a glance" hiring tool that contains the truth about every candidate's total career.

## *So … let's begin the journey!*

# Your Journey Begins Here!

This is where you'll start, either to receive a free username and password as a Topgrading Snapshot Administrator for your organization or as a returning administrator. This is where you will prepare and send invitations, inviting them to continue the hiring process by completing the online Career History Form. It's also where you will monitor the progress of your prospective candidates from the invitation step through delivery of their Topgrading Snapshot.

The URL (website address) is: **http://admin.tgsnapshot.com**

On this screen, you have two options. First, if you have not yet received your username and password, the first option will get that done. There's no charge and we include two tokens for free Topgrading Snapshots to use for testing purposes (one for you to complete and one for a candidate) and two examples to study. The second option will take you to the login page where you'll enter your username and password to access the Topgrading Administration Center.

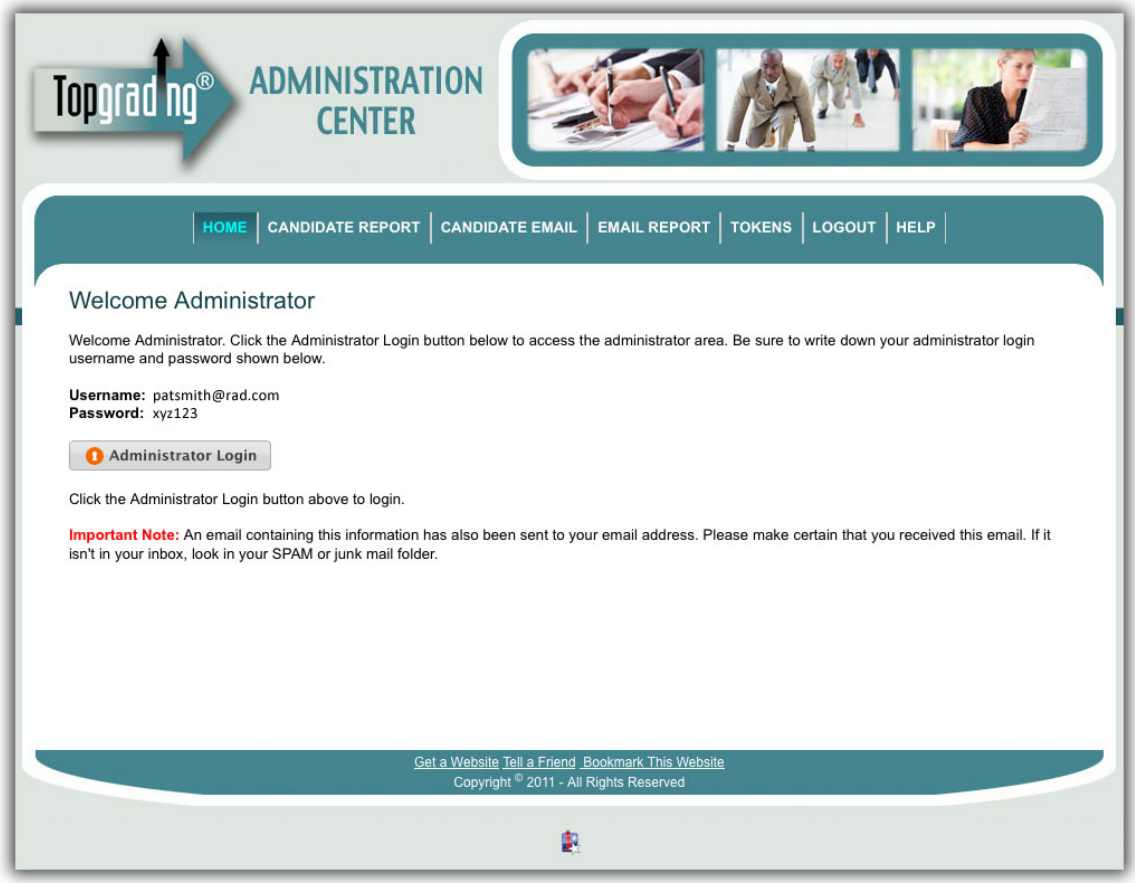
If you don't already have a username and password, click on the first option and get started so we can proceed. When you have received your username and password, on subsequent visits you'll click on the second option and proceed directly to the **Login Page**.

# Signing Up For Your Free Username & Password

This page is a very simple web form. Just complete the requested information and press the **Click TO BECOME A Topgrading Administrator** button and you'll be ready to go!

# Welcome New Administrator!

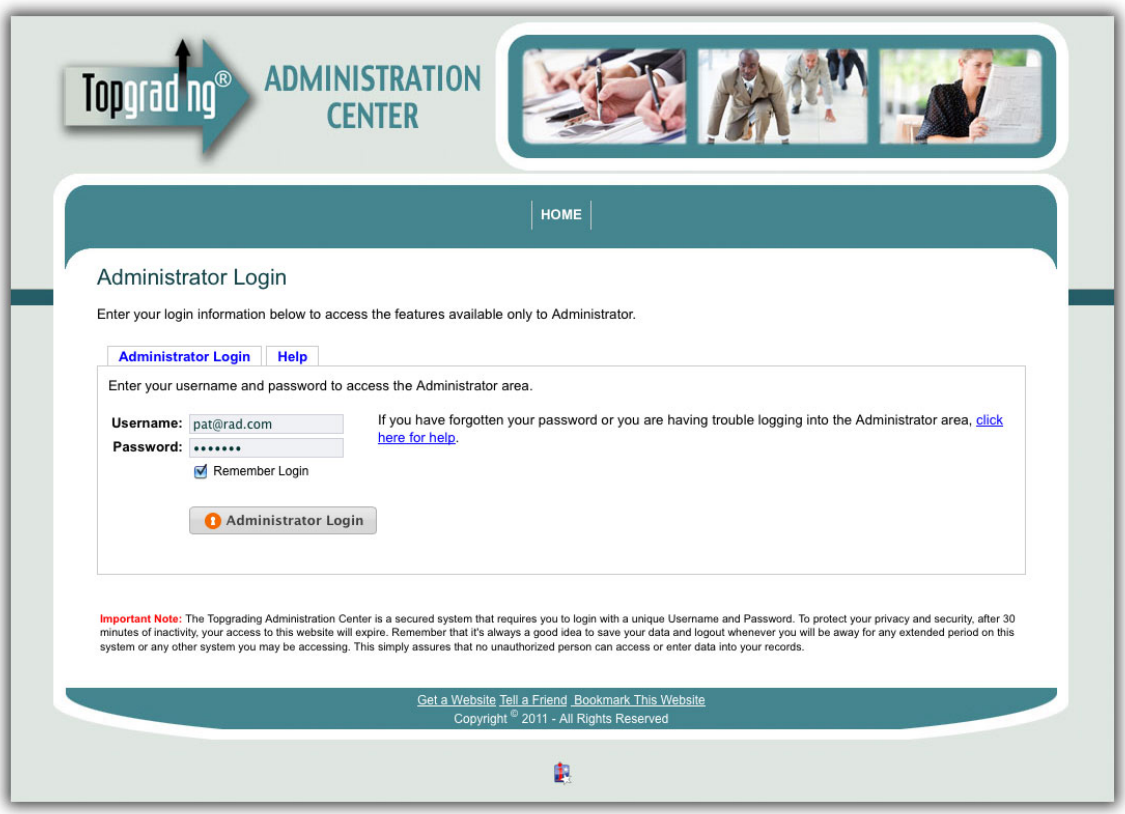
When you have submitted the signup, you'll see this page, which contains your Username and Password. Please make sure to write these down and keep them in a safe place as you would with any valuable business asset. Once you have taken care of that, click on the **Administrator Login** button and you will be logged in automatically.




**Important Note:** This is the ONLY time you'll be logged in automatically without having to enter your username and password. On all subsequent visits to the Topgrading Administration Center, you will need to click on the link for "Returning Administrators" which will take you to the Login Page that is explained in the next section.

# The Login Page

When you are a Returning Administrator you will visit this page where you will enter the credentials you received in the previous steps.




Just enter your Username and Password and click the **Administrator Login** button and you'll be presented with additional menu options for the administrative functions of this website and for all of the tools that are available for your use.

# The Candidate Report Page

This is the first page you'll see whenever you login to the Topgrading Administration Center. Here you'll be able to look at each of the candidates who have submitted their Career History Forms and drill down into their information for further details.

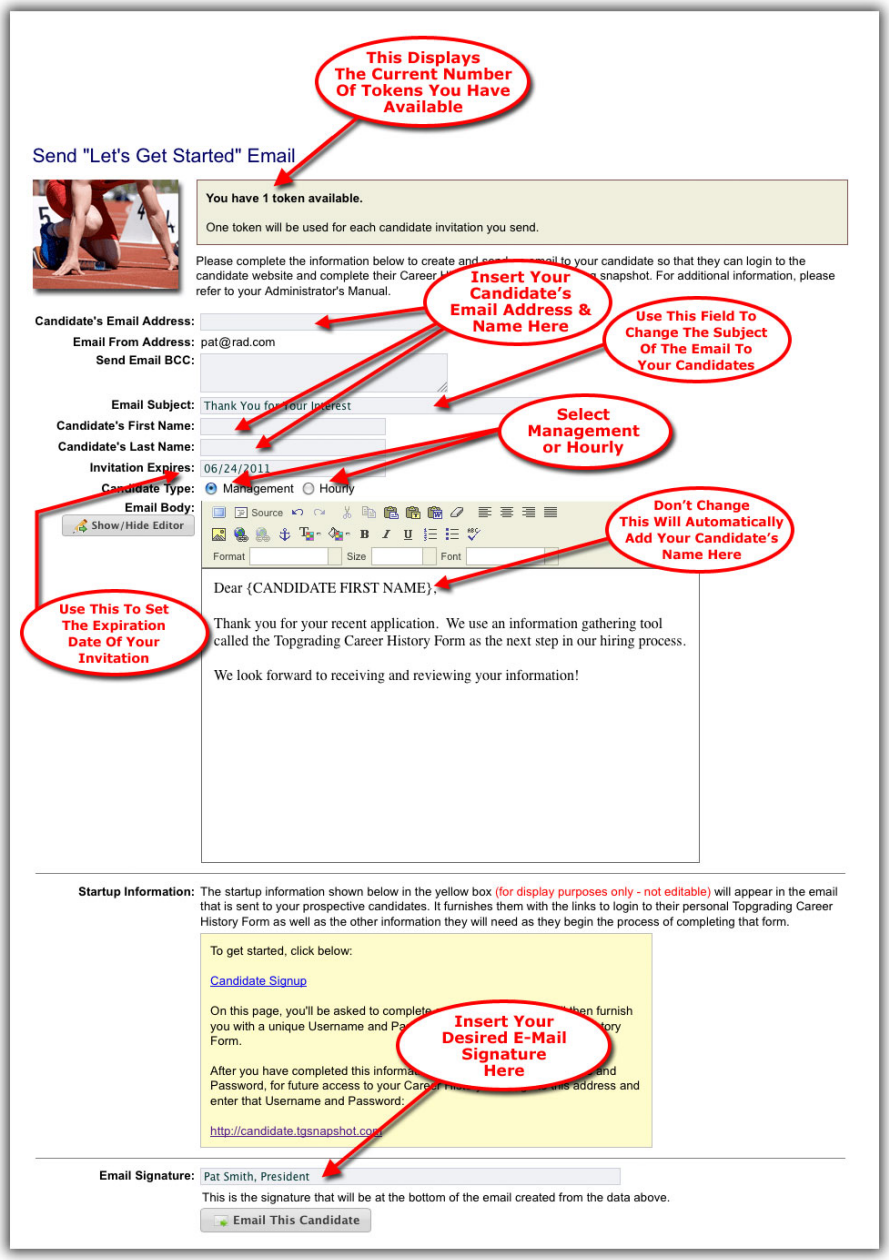
The screenshot below shows that you have two sample candidates, John Doe and Erik Dorsman. We'll explain more about them in a later section, but they are here for your use and when you no longer wish them to appear, you can flag them to be archived by checking the small box that precedes the last name of the candidate and then clicking on the **Archive Candidate** button.

Important Note: As we explained on the previous page, you may have noticed as soon as you are logged in that additional menu items have now appeared for your use. For security purposes, the system does not display these menu items unless you have logged in and your username and password have been validated and accepted.

We'll explain more about this report in a subsequent section, but first, let's take a look at how you will send email invitations to your prospective candidates.

# Sending An Invitation Email

To begin a candidate's journey toward completion of their online Topgrading Career History Form and Topgrading Snapshot, you will need to send them an invitation email that directs them to http://candidate.tgsnapshot.com. This is where candidates are required to enter the necessary information to receive a username and password, allowing them access to the website. To prepare an invitation email for a prospective candidate, simply click on the **Send Invitations** link and you'll see the screen below:



# Sending An Invitation Email (continued)

As you can see from the graphic on the previous page, there are several options that allow you to customize the email that is sent to your new candidates.

**Available Tokens –** At the top of the screen, you'll notice the grey box that indicates the number of Tokens you currently have available. Each email you send to a candidate uses one token. If you have no tokens available, this page will display a link to the "Tokens" page where you can buy additional tokens.

**Candidate Email Address & Name –** Insert the candidate's email address and first and last name in these fields.

**Addressing Options** – Insert the candidate's email address in the appropriate field and any additional addresses you wish to add to the Blind Carbon Copy field (separate with commas if more than one BCC is needed). The "email from:" address for the administrator is a default setting that is created when your account is setup. It can be changed by clicking on the **Settings** menu link.

**Email Subject** – The subject line of the email can be anything you choose. Be careful to not make this too wordy and avoid words that might get your email flagged as SPAM such as "awesome, fantastic, free, super, big money, etc." It's better to be factual and insure that your candidate receives the email without having to hunt for it in a Junk Mail folder.

**Important Note:** To be certain that your candidate actually receives your email, monitor the candidate report regularly and if a candidate has not even logged in, it would be a good idea to call and make sure your email was received and not languishing in a SPAM folder. If your candidate says they never received it, use the copy in your inbox that came via the Blind Carbon Copy and send it again.

**Invitation Expiration Date –** This field allows you to determine how long your invitations will remain "open" for a response. Two days prior to the expiration date, your applicant will be reminded that the closing date is near and on the expiration date, they will be informed that the applications are no longer being accepted.

**Important Note:** When an invitation expires, the token will be returned to you for re-use at no additional charge.

**Management vs. Hourly** – Based on the position for which the candidate is applying, please select either management (salaried) or hourly. This will determine the questions to be asked by the Career History Form and the appearance of the actual Topgrading Snapshot™ Graphic Image.

# Sending An Invitation Email (continued)

**Email Body Content** – You may edit the body copy in the email to meet your needs. However, please keep in mind that the data enclosed in the special brackets are "system fields" that are used to automatically insert stored system information into your emails if desired. These fields are **{Candidate First Name}**, **{Company Name}** and **{Company Phone Number}**. By default, the system field **{Candidate First Name}** is already included in the default email.

**Important Note:** You may change the body of the email and/or insert anything you wish. Just remember, if you use ANY of the system fields, they must be exactly as shown. Modifying them in any way will disable their functionality.

**Startup Information** – This is the information (highlighted in the yellow box) that is sent to a candidate to allow him or her access to the Candidate Career website. This information is automatically included in the email your candidates receive.

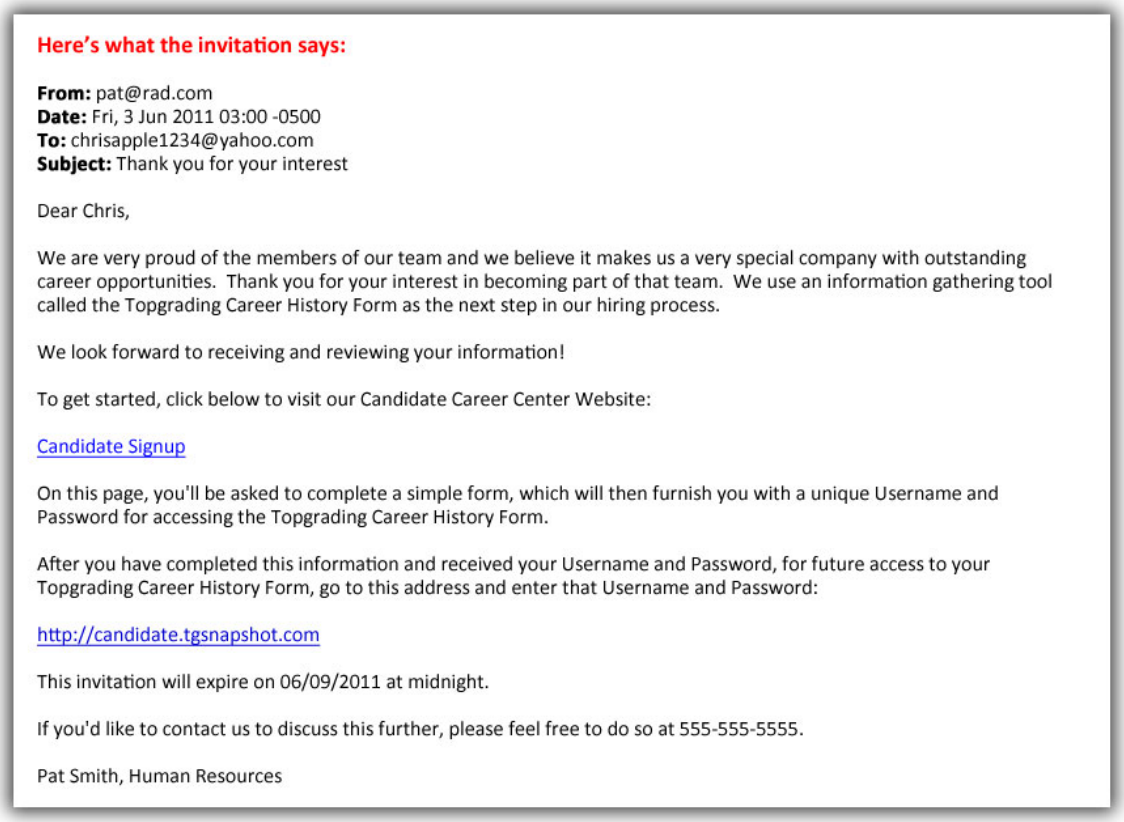
**Email Signature** – This is what will be displayed on the last line of the email your candidates receive. You may add whatever closing text you choose.

**Important Note:** Note that at the top of this page, we show you the number of tokens you currently have available. You are charged for one token each time you send an email. The next section explains how to buy additional tokens.

Once you are satisfied with the data and are ready to send your email, just click on the **Email This Candidate** button and your email will be on its way.

# Sample Invitation Email

Your candidate will receive an email such as the one shown below when you invite them to visit the website and complete Topgrading Career History Form:



**Here's what the invitation says:**

**From:** pat@rad.com
**Date:** Fri, 3 Jun 2011 03:00 -0500
**To:** chrisapple1234@yahoo.com
**Subject:** Thank you for your interest

Dear Chris,

We are very proud of the members of our team and we believe it makes us a very special company with outstanding career opportunities. Thank you for your interest in becoming part of that team. We use an information gathering tool called the Topgrading Career History Form as the next step in our hiring process.

We look forward to receiving and reviewing your information!

To get started, click below to visit our Candidate Career Center Website:

Candidate Signup

On this page, you'll be asked to complete a simple form, which will then furnish you with a unique Username and Password for accessing the Topgrading Career History Form.

After you have completed this information and received your Username and Password, for future access to your Topgrading Career History Form, go to this address and enter that Username and Password:

http://candidate.tgsnapshot.com

This invitation will expire on 06/09/2011 at midnight.

If you'd like to contact us to discuss this further, please feel free to do so at 555-555-5555.

Pat Smith, Human Resources

Using the links in this email, your candidates can access the Topgrading Candidate Career Center website, receive their username and password and begin entering their data to complete the Topgrading Career History Form.

**Important Note:** When a candidate completes their Topgrading Career History Form, you will be notified via email. This email will also contain a printable copy of his or her completed Topgrading Career History Form and Topgrading Snapshot in the Adobe .PDF file format.

# Tokens

If you need to purchase a token to send an email or simply want to review your inventory of tokens, this page is where you'll go. Remember that each email you send to a candidate consumes one token.

**Important Note:** You will receive two free tokens as soon as you sign up. We recommend you use one to complete your own Topgrading Career History Form and use the other for your organization's next serious candidate.

Clicking on the **Use This Token** button will take you to the **Send Invitations** page where you can compose an email invitation for a new candidate.

If you need more tokens, just use the "**Click here to purchase additional tokens**" link shown and you'll be taken to a secure area where you can buy them.

**Important Note:** If you anticipate that your hiring needs will require more than fifty tokens in the next year, please contact us directly at (847) 265-7415 to discuss volume discounts and other options such as integration with other personnel and hiring systems and complete customization to exactly duplicate your existing website.

# Purchasing Tokens

When you have clicked on the link to purchase additional tokens, you will see this screen. This is a secure area (see note below) where you'll enter your credit card information to purchase one or more tokens. Once you've entered your information (and reviewed it carefully to make sure it's correct), just press the **PURCHASE TOKENS** button and you'll be all set.

**Important Note:** The **VeriSign Trusted** logo on the bottom of the screen is your indication that all transactions processed using this website are secure.

Now that you understand how to purchase and use tokens and how to send emails to prospective candidates, let's take a look at the Email Report, which tracks this process.

# Email Report

The Email Report allows you to track the emails you've sent to candidates and correlate that to the Candidate Report to determine activity, completion ratios, etc.

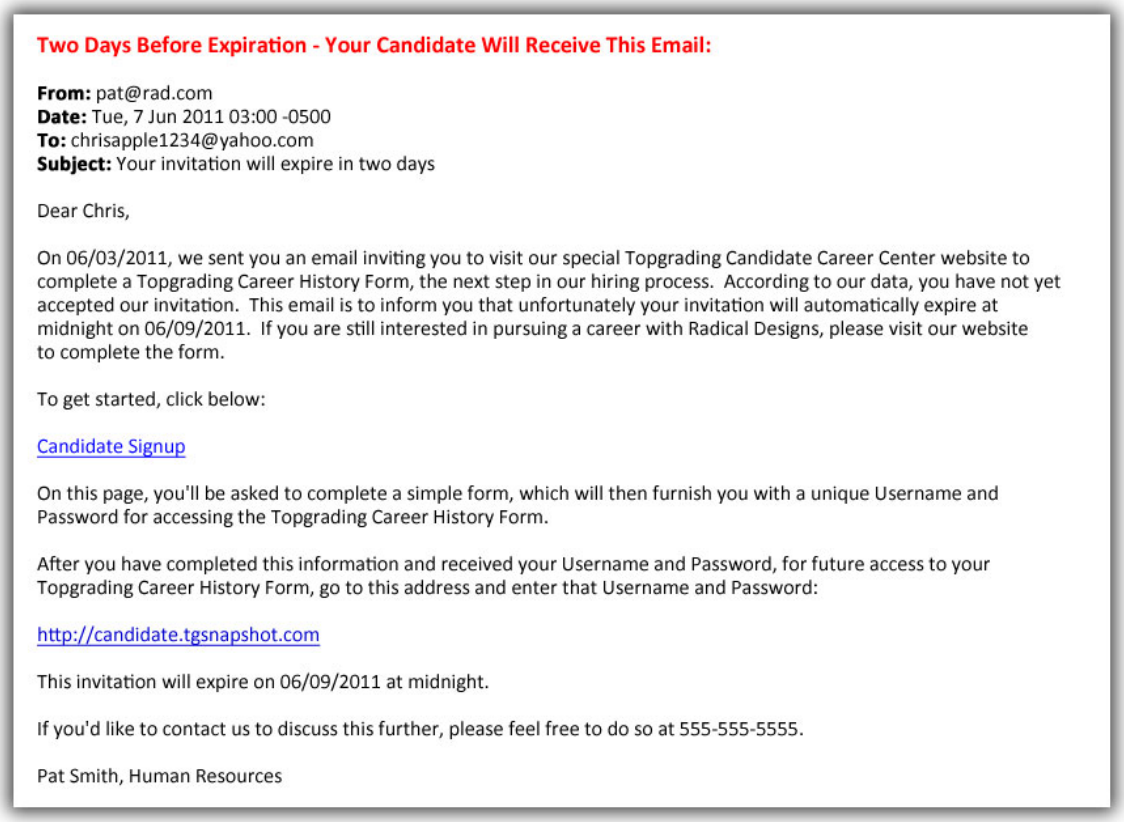
To access this report, just click on the **Email Report** menu link.

**Important Note:** To cancel an invitation and send your candidate an email informing him or her that applications for the position are no longer being accepted or to send a previous invitation that may not have been received or has expired, click on the candidate's name. See below and Appendix A for additional information on these options as well as instructions about how to re-activate a cancelled or expired invitation.

The following pages contain examples of the emails candidates will automatically receive as their invitation expiration date approaches as well as what they receive when the expiration deadline has passed or if you cancel the invitation (for example if the position has already been filled).

# Sample Notification Email (Two Days Before Expiration)

As the expiration deadline approaches, your candidate will receive email notifications such as these ones shown below. System emails are processed for delivery at 3:00 AM (Eastern Time), allowing for Pacific Time Zone issues.



**Two Days Before Expiration - Your Candidate Will Receive This Email:**

**From:** pat@rad.com
**Date:** Tue, 7 Jun 2011 03:00 -0500
**To:** chrisapple1234@yahoo.com
**Subject:** Your invitation will expire in two days

Dear Chris,

On 06/03/2011, we sent you an email inviting you to visit our special Topgrading Candidate Career Center website to complete a Topgrading Career History Form, the next step in our hiring process. According to our data, you have not yet accepted our invitation. This email is to inform you that unfortunately your invitation will automatically expire at midnight on 06/09/2011. If you are still interested in pursuing a career with Radical Designs, please visit our website to complete the form.

To get started, click below:

Candidate Signup

On this page, you'll be asked to complete a simple form, which will then furnish you with a unique Username and Password for accessing the Topgrading Career History Form.

After you have completed this information and received your Username and Password, for future access to your Topgrading Career History Form, go to this address and enter that Username and Password:

http://candidate.tgsnapshot.com

This invitation will expire on 06/09/2011 at midnight.

If you'd like to contact us to discuss this further, please feel free to do so at 555-555-5555.

Pat Smith, Human Resources

Each email includes the Candidate Signup information and login information and reminds the candidate of the date and time the invitation will expire.

# Sample Notification Email (Date of Expiration)

This email goes out as a "last warning" on the date of expiration.

**On The Date Of Expiration, Your Candidate Will Receive This Email:**

**From:** pat@rad.com
**Date:** Thu, 9 Jun 2011 03:00 -0500
**To:** chrisapple1234@yahoo.com
**Subject:** Your invitation expires tonight at midnight

Dear Chris,

On 06/03/2011, we sent you an email inviting you to visit our special Topgrading Candidate Career Center website to complete a Topgrading Career History Form, the next step in our hiring process. According to our data, you have not yet accepted our invitation. This email is to inform you that unfortunately your invitation will automatically expire tonight at midnight. If you are still interested in pursuing a career with Radical Designs, please visit our website and complete the form.

To get started, click below:

Candidate Signup

On this page, you'll be asked to complete a simple form, which will then furnish you with a unique Username and Password for accessing the Topgrading Career History Form.

After you have completed this information and received your Username and Password, for future access to your Topgrading Career History Form, go to this address and enter that Username and Password:

http://candidate.tgsnapshot.com

This invitation expires tonight at midnight.

If you'd like to contact us to discuss this further, please feel free to do so at 555-555-5555.

Pat Smith, Human Resources

**Important Note:** At 3:00 AM (Eastern Time) on the morning following the expiration date, the system will no longer accept any login from an invitation whose expiration date has passed. The system will inform them that their invitation's expiration date has passed.

# Sample Notification Email (Expiration or Cancellation)

After an invitation's expiration has occurred and the system will no longer accept the candidate's application, your candidate receives this email.

**On The Day Following Expiration, Your Candidate Will Receive This Email:**

**From:** pat@rad.com
**Date:** Fri, 10 Jun 2011 03:00 -0500
**To:** chrisapple1234@yahoo.com
**Subject:** Your invitation has expired

Dear Chris,

On 06/03/2011, we sent you an email inviting you to visit our special Topgrading Candidate Career Center website to complete a Topgrading Career History Form, the next step in our hiring process. According to our data, you did not accept our invitation and this email is to inform you that unfortunately your invitation has automatically expired and our system can no longer accept your application.

If you'd like to contact us to discuss this further, please feel free to do so at 555-555-5555.

Pat Smith, Human Resources

If an invitation is cancelled before its expiration date, this email is sent immediately.

**If you choose to cancel an invitation before its expiration date, your candidate will receive this email:**

**From:** pat@rad.com
**Date:** Mon,06 Jun 2011 03:00 -0500
**To:** chrisapple1234@yahoo.com
**Subject:** Applications are no longer being accepted

Dear Chris,

On 06/03/2011, we sent you an email inviting you to visit our special Topgrading Candidate Career Center website to complete a Topgrading Career History Form, the next step in our hiring process. Unfortunately, this email is to inform you that we are no longer accepting applications for this opening. We appreciate your interest.

If you'd like to contact us to discuss this further, please feel free to do so at 555-555-5555.

Pat Smith, Human Resources

The purpose of these emails is to both maximize responses via the reminders as well as minimize unnecessary phone calls to answer questions about the process and expiration issues.

Next, we'll discuss the **Candidate Report** we mentioned earlier where you'll review Topgrading Career History Forms that have been completed by your applicants.

# Candidate Report

This is the dashboard of the system. It contains links to each candidate's submitted Career History Form and data about their progress.

**Important Note:** When candidates initially login and begin to complete their Topgrading Career History Form, they appear on this report with a status of "In Process". When a candidate has completed their Topgrading Career History Form, you will receive an "Application Completed" email with attachments that are printable (.PDF) versions of each candidate's Topgrading Career History Form and Topgrading Snapshot. At the point, the candidate's status will change to "Completed" and their data and the same printable documents will then be accessible online (see page 21).

When you have multiple candidates in the system, you can use the filters and search options (see above) to narrow your search. You can also access any section and drill down to a specific bit of information.

# Candidate Report (continued)

**Candidate Search** - You can search for a specific applicant by entering all or part of the desired applicant's last name and click on **Apply Filters** button or by simply clicking on the candidate's last name if it is already displayed.

**Sorting -** The columns on this report can be sorted simply by clicking on the up/down arrows that precede each column header.

**Date Range** – The display can be sorted for a range of dates by changing the "Application Date Start" and/or "Application End Apply" filters. Once a change is made to either or both dates, pressing the **Apply Filters** Button will change the display to reflect the desired date range.

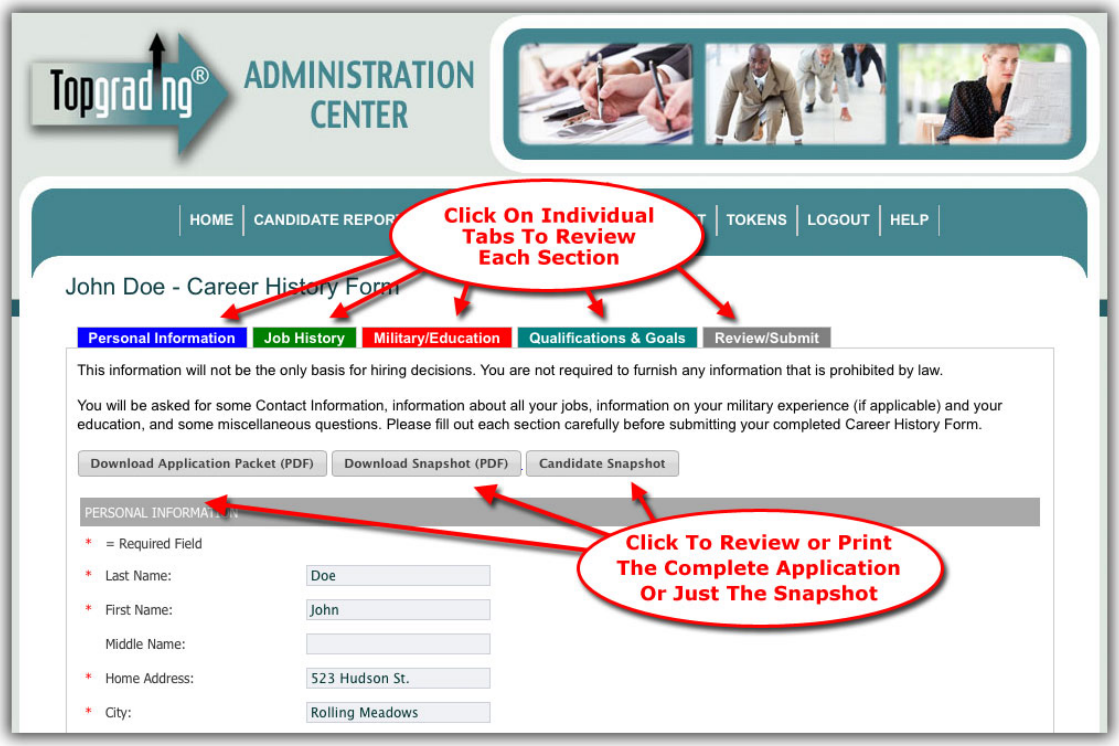
**Archiving** – You may "Archive" a candidate once a hiring decision has been made. This means that this candidate will no longer appear in your "Active" (default) view. However, by changing the Candidate Status filter, you can look at "All", "Active" or "Archived" applicants. To "Archive" one (or more) candidate's data, simply click on the checkbox next to their last name and click on the "**Archive Candidate(s)**" button on the bottom of the page.

**Important Note:** Remember to pay close attention to Date Range and Archiving options when searching for candidates. Occasionally, you may feel you are unable to locate a candidate's information, only to realize that your filters are hiding it.

# Candidate Information

When you click on a candidate's name, the screen below will appear with your candidate's information. You can click on the various tabs to review every page of the candidate's Topgrading Career History Form or click on one of three buttons (shown below) to:

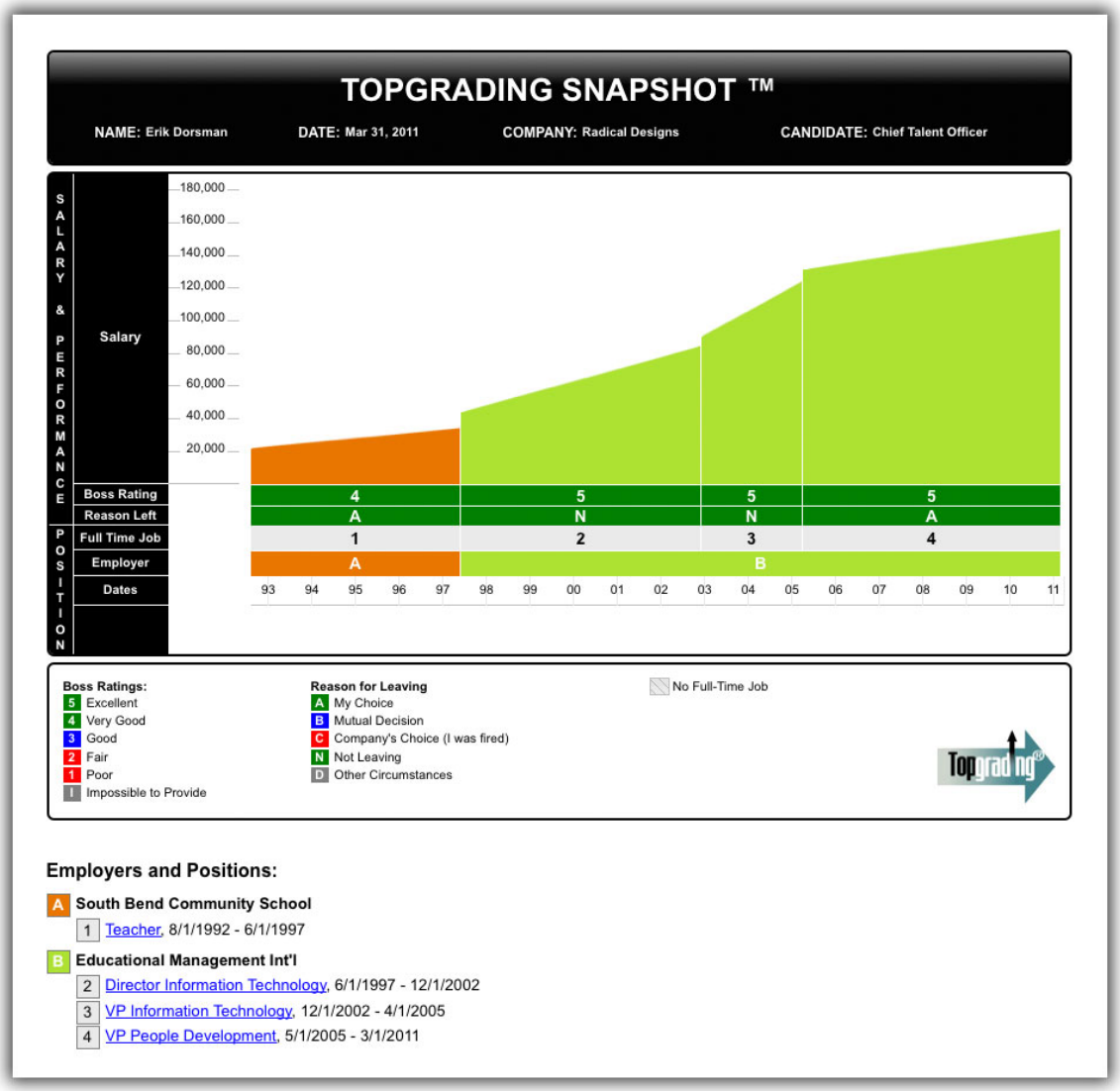
- Download a .PDF file containing a printable copy of the complete Topgrading Career History Form (including the Topgrading Snapshot™).
- Download a .PDF file containing a printable copy of only the Topgrading Snapshot™ portion of the Topgrading Career History Form in a landscape (larger) version.
- Review a screen display of the Topgrading Snapshot™.




Please review the included Topgrading Career History Form samples to familiarize yourself with the information that is gathered about your candidates and the Topgrading Snapshot that is created from this information.

# The Topgrading Snapshot™ Document

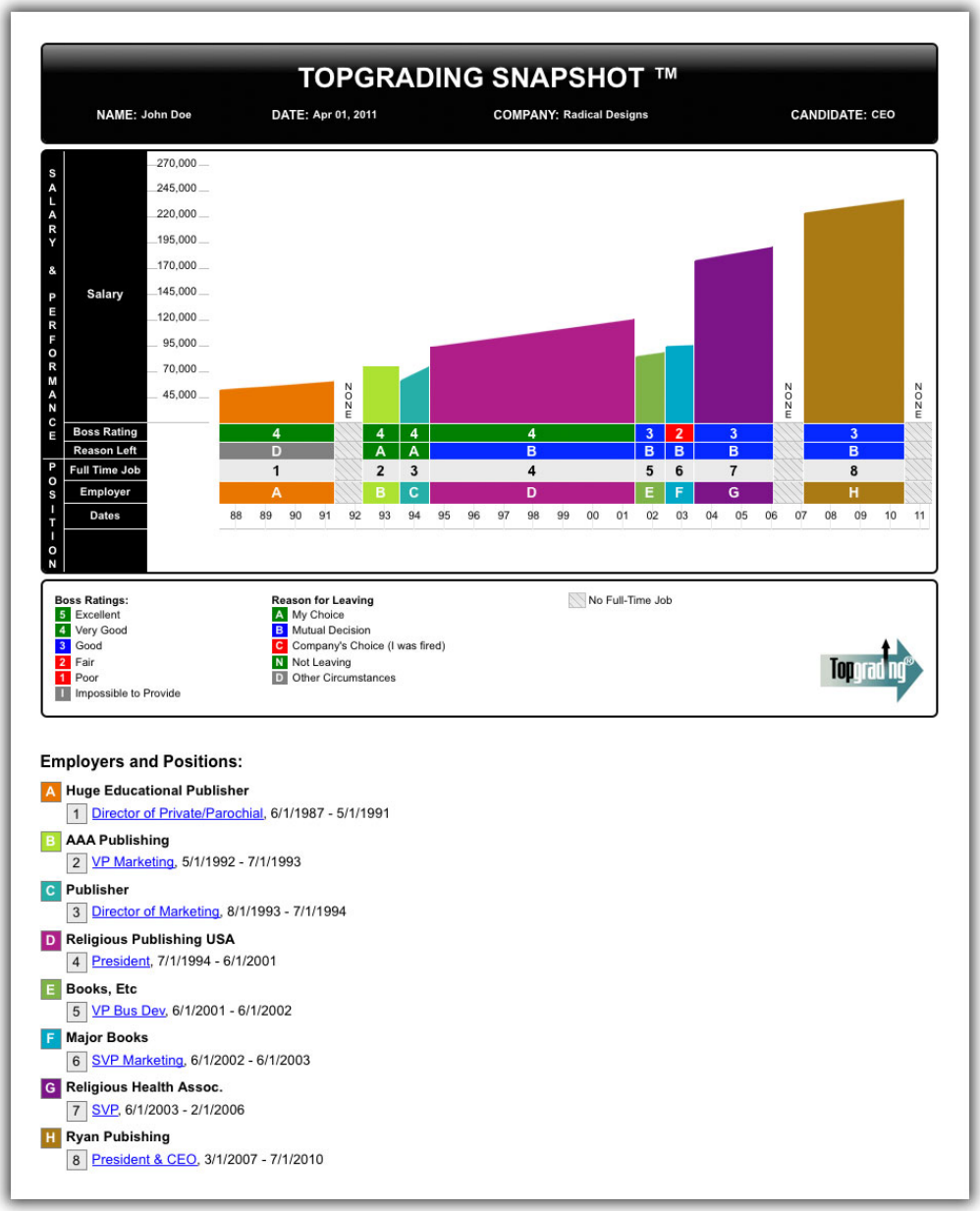
The most unique aspect of this system is, of course, Topgrading Snapshot™ itself. This "at a glance" representation of your candidates will tell you a great deal about them.




For example, this excellent candidate (one of the samples we have included) has only worked for two employers in 18 years (great stability and very few colors since all jobs at the same employer use the same color). He indicates that all his bosses would have rated him very well and his reasons for leaving were of his own choosing. All of these are solid predictors of future success. On the next screen we'll show you a different candidate and the contrast is dramatic.

# The Topgrading Snapshot™ Document (continued)

Take a look at the data in the less desirable candidate's snapshot.



TOPGRADING SNAPSHOT ™

NAME: John Doe DATE: Apr 01, 2011 COMPANY: Radical Designs CANDIDATE: CEO

SALARY & PERFORMANCE

Salary: 270,000 / 245,000 / 220,000 / 195,000 / 170,000 / 145,000 / 120,000 / 95,000 / 70,000 / 45,000

POSITION

| | 88 | 89 | 90 | 91 | 92 | 93 | 94 | 95 | 96 | 97 | 98 | 99 | 00 | 01 | 02 | 03 | 04 | 05 | 06 | 07 | 08 | 09 | 10 | 11 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Boss Rating | 4 | | | | | 4 | 4 | 4 | | | | | | | 3 | 2 | 3 | | | | 3 | | | |
| Reason Left | D | | | | | A | A | B | | | | | | | B | B | B | | | | B | | | |
| Full Time Job | 1 | | | | | 2 | 3 | 4 | | | | | | | 5 | 6 | 7 | | | | 8 | | | |
| Employer | A | | | | | B | C | D | | | | | | | E | F | G | | | | H | | | |
| Dates | | | | | NONE | | | | | | | | | | | | | | NONE | | | | | NONE |

Boss Ratings:
5 Excellent
4 Very Good
3 Good
2 Fair
1 Poor
I Impossible to Provide

Reason for Leaving
A My Choice
B Mutual Decision
C Company's Choice (I was fired)
N Not Leaving
D Other Circumstances

No Full-Time Job

Topgrading®

**Employers and Positions:**

A **Huge Educational Publisher**
1 Director of Private/Parochial, 6/1/1987 - 5/1/1991

B **AAA Publishing**
2 VP Marketing, 5/1/1992 - 7/1/1993

C **Publisher**
3 Director of Marketing, 8/1/1993 - 7/1/1994

D **Religious Publishing USA**
4 President, 7/1/1994 - 6/1/2001

E **Books, Etc**
5 VP Bus Dev, 6/1/2001 - 6/1/2002

F **Major Books**
6 SVP Marketing, 6/1/2002 - 6/1/2003

G **Religious Health Assoc.**
7 SVP, 6/1/2003 - 2/1/2006

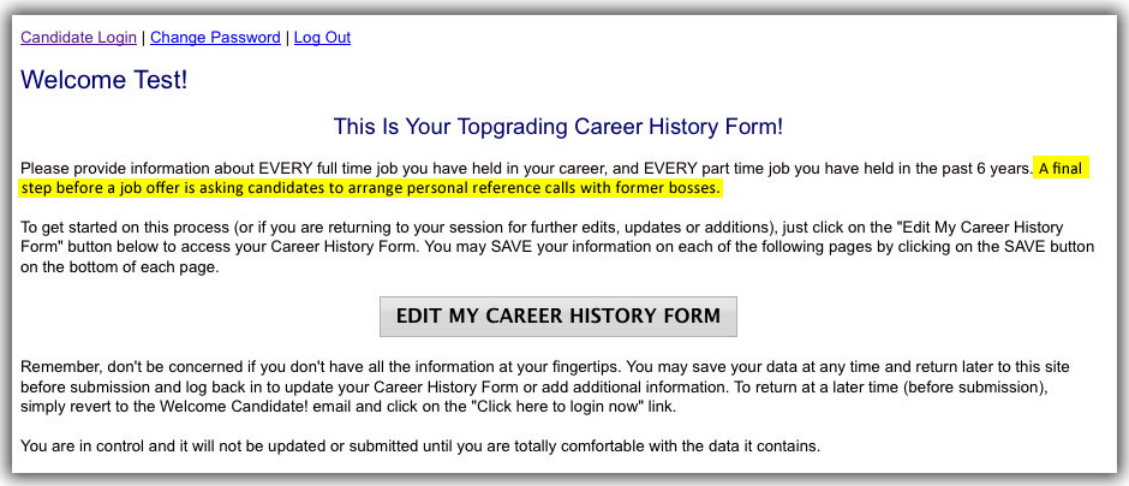
H **Ryan Pubishing**
8 President & CEO, 3/1/2007 - 7/1/2010

First, there are lots of different colors indicating lots of jobs and employers – eight jobs in 23 years and he's looking for his sixth job in eleven years - signs of a "job hopper". There are multiple gaps in his employment record and while his early boss ratings were pretty good, his latter ones were mediocre to poor. Finally, he has multiple occurrences of "Mutual Decision" in the reason for leaving, usually indicative of less than favorable success in that job.

# The Topgrading Snapshot™ Truth Serum

The Topgrading Snapshot™ can dramatically expedite your hiring process by quickly showing you whether a candidate looks worthy of further exploration into the data within the Career History Form and a possible subsequent in-person interview, or they are just not a good fit.

**Most Important Note: The one additional element that makes the Topgrading Snapshot™ truly the ultimate information gathering and screening tool for personnel, is its built-in "truth serum".**




This one simple line, "A final step before a job offer is asking candidates to arrange personal reference calls with former bosses," is displayed on the screen your candidate sees just before they move forward to begin completing their Career History Form. This makes it obvious that you are serious about this process and any statements of salary and success will need to be verified. For low performers, with "spotty careers," this is a deterrent to even completing the application. This is desirable because you only want to look at the very best candidates and not squander your precious time and money looking at less desirable candidates who look great on paper and can't back up their resume with facts.

# Summary

Now that you've seen what this amazing tool has to offer and how valuable it can be in making sure you hire the best possible candidates to help grow your business, it's time for you to get going! Please explore every aspect of this system.

Send yourself an invitation email and complete your own Topgrading Career History Form and look at the Topgrading Snapshot it creates. Then select a candidate you are considering for employment and send them an email inviting them to complete a Topgrading Career History Form. The results will amaze you!

Thanks for considering Topgrading for your company and if you would like to learn more, not only about Topgrading, but all of the other products and services Smart & Associates provides for employers and the talent acquisition industry, please visit our website at:

http://www.smarttopgrading.com

If you have any questions or require further assistance, please call us at (847) 265-7415 and we'll be more than happy to help.

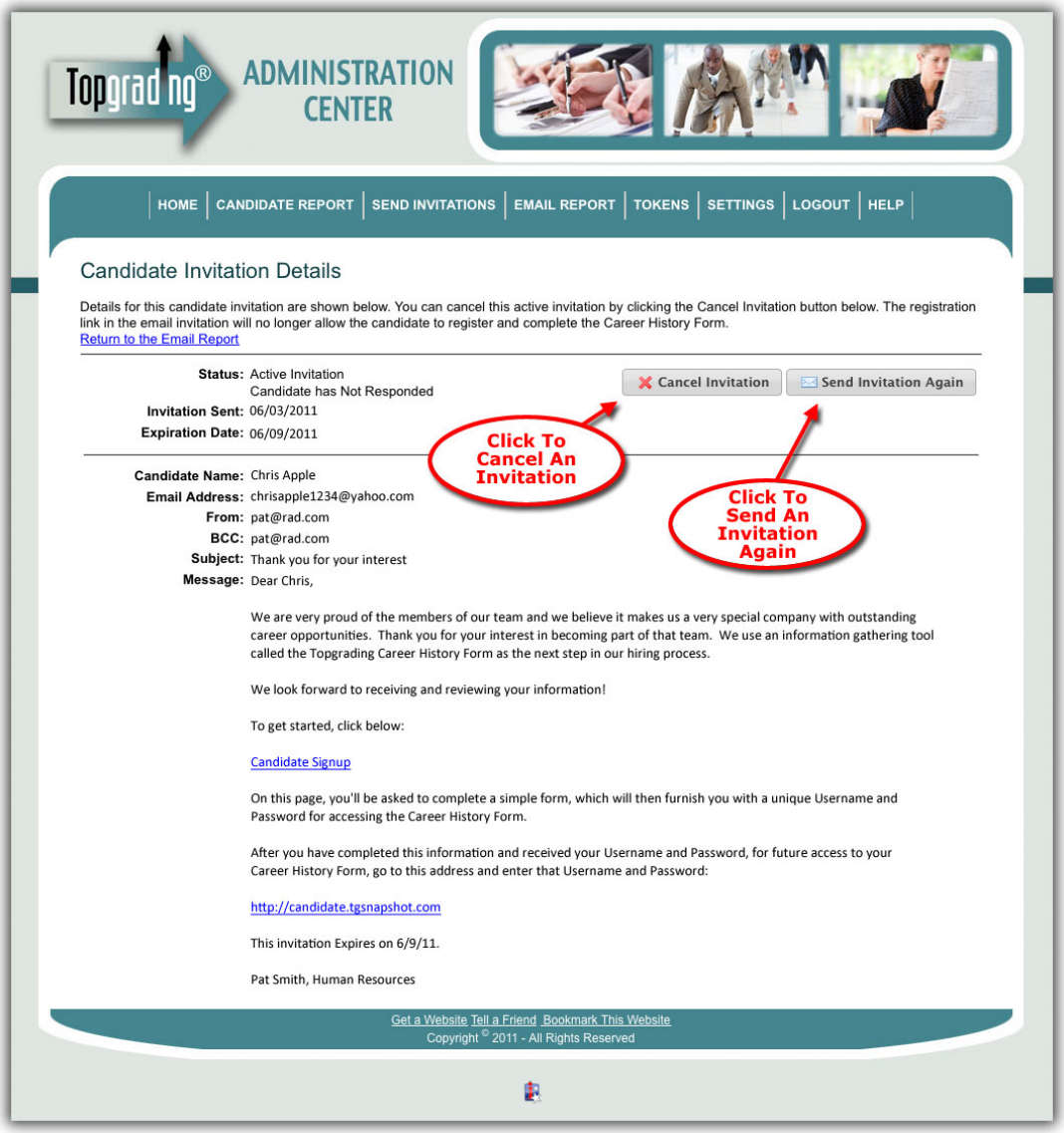
We wish you only "A Players" and great success!

Thanks again for using the Topgrading Snapshot™ and good luck in your search for the best possible members of your team!

Brad Smart
President
Smart & Associates, Inc.

# Appendix A – Cancelling Or Resending An Invitation

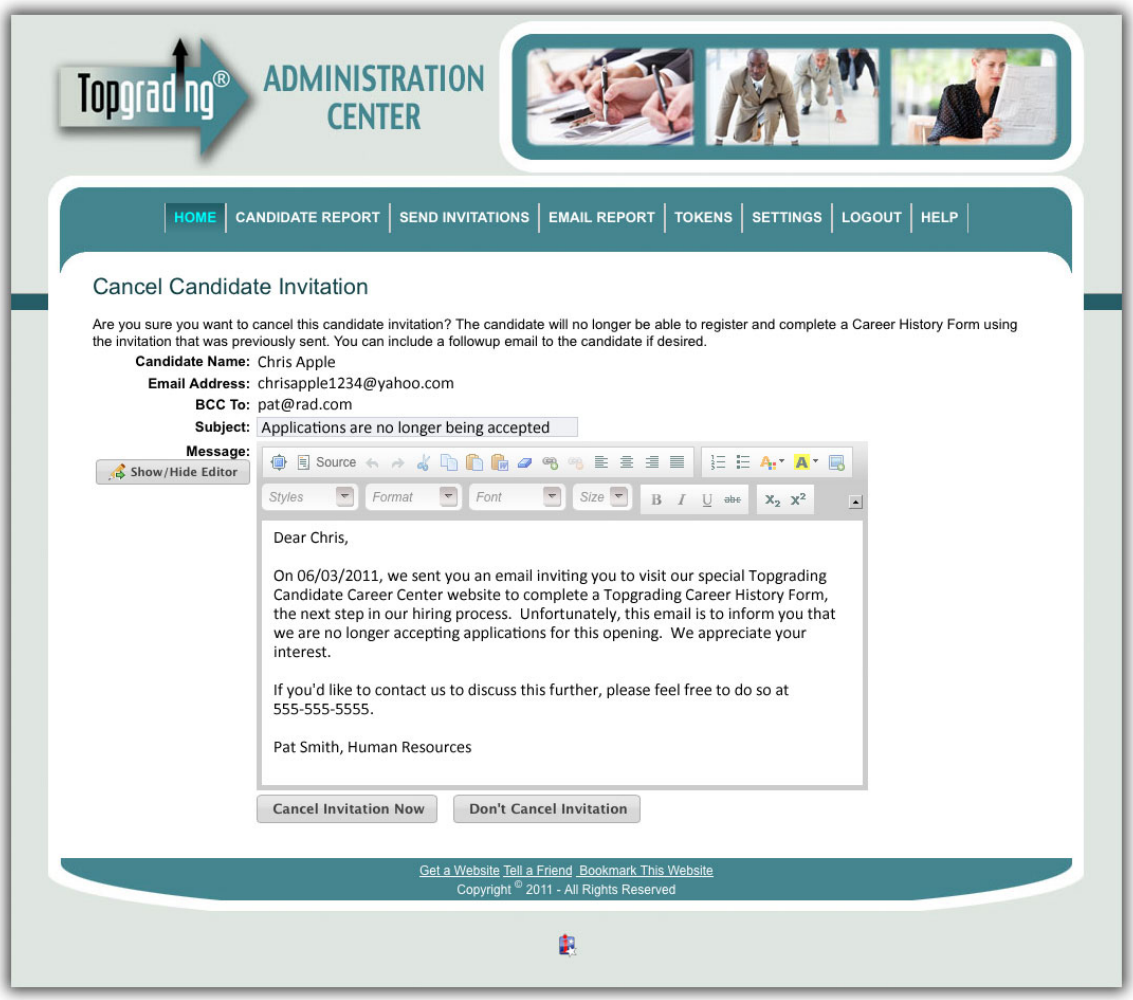
If you need to cancel an active invitation (ex: if a position has already been filled) and no longer wish to receive applications or you need to send a copy of an invitation that has expired or been cancelled to a candidate, click on the candidate's last name and the **Candidate Invitation Details** screen shown below will be displayed.




On this screen, you'll see two buttons. Clicking the **Cancel Invitation** button will allow you to cancel an invitation and will automatically send the candidate an email notifying him or her regarding the cancellation.

# Cancelling An Invitation

Clicking on the **Cancel Invitation** button from a **Candidate Information Details** display will display the screen shown below. On it, you can change either the Subject of the email or the information contained in the body copy.




When you are satisfied that the information is correct, click on the Cancel Invitation Now button and the email will be delivered. At that time, the system will no longer accept that candidate's login to receive a username and password (see **Appendix C** for example).

# Reactivating An Expired or Cancelled Invitation

If an invitation has been cancelled or has expired, you may choose to re-activate it by clicking on the **Reactivate & Send Invitation Again** Button.

This will take you to the screen below where you can edit the email and resend it.

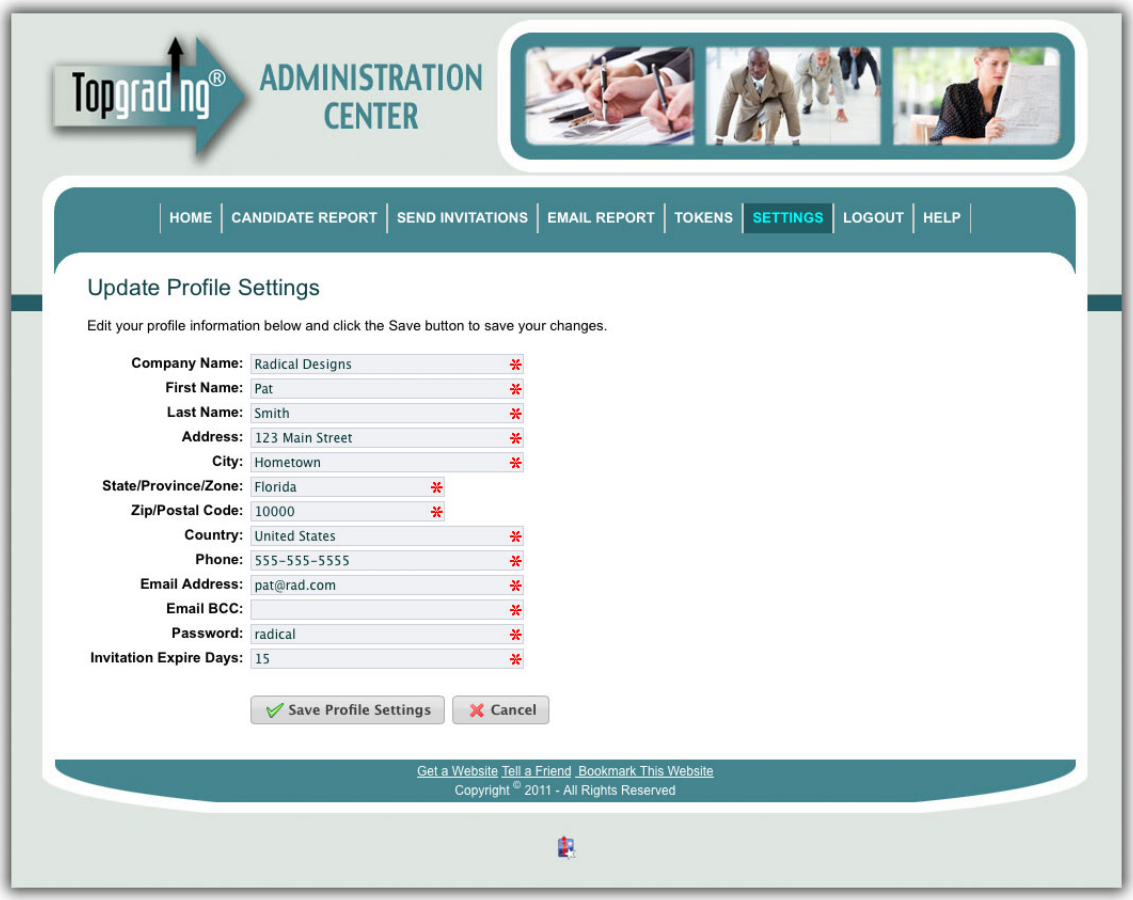
# Sending An Invitation Again

Clicking on the **Send Invitation Again Now** button (on an active invitation) or on the **Reactivate & Send Invitation Again** button (on an expired or cancelled invitation) from the **Candidate Information Details** display will display the screen shown below. On it, you can change either the candidate's email address (to correct a spelling error or choose a different address) or the expiration date of the invitation.

When the data is correct, just click on the **Send Invitation Again Now** button and your candidate will receive the email displayed on this screen. Pressing the **Don't Send** button will cancel this action without sending the email.

# Appendix B – Administrator Profile Settings

If you need to change your default settings (ex: change of address, new email, etc.), clicking on the Settings menu link will display the **Update Profile Settings** screen shown below, allowing you to modify your administrator profile data.




When the data is correct, just click on the **Save Profile Settings** and your updated profile information will be stored.

# Appendix C – Expired Link Screen

This is what a visitor to the Topgrading Candidate Career Center sees when they try to use a link in an expired or cancelled invitation. They are referred back to the administrator who sent them the invitation.