

# Onboarding Pack

**This guide will walk you through some of the best strategies and emails when launching Wizer:**

Including:

- Onboarding email templates
- Follow-up strategies
- Super Influencer identification and activation
- Network engagement steps
- Example questions to get started
- Links to all key resources

## wizer

### Welcome to Wizer

Welcome to Wizer, the platform designed to help your organization make better decisions by leveraging your people's unique strengths.

The screenshot displays the 'Create a Study' interface in Wizer. At the top, a progress bar shows four steps: 'ask questions', 'review questions', 'review draft with crowd', and 'send your study'. The 'review questions' step is currently active. Below the progress bar, there's a 'Results' section with a 'Panel Strength' indicator (a green bar with a triangle pointing to 'high'). The 'Results' section also shows '5' questions and '21' total count. Below this, there are three main sections: '1. Review Study Data' (with sliders for Diversity, Experience, and Decision Style), '2. Review Suggested People' (listing names like Talla France, Christine Rodriguez, Darin Richmond, Brooklyn Ellis, Jim Bray, Alyce Ballard, and Ernestine Daniels), and '3. Review Suggested Panels' (listing panels like Sales Strategy, Disaster Research, Newsletter Marketing, and Onboarding). An 'APPROVE' button is located at the top right of the interface.



## TIPS

Ask your first question within a week of onboarding – this will increase engagement

# Welcome

Wizer helps teams make better decisions by identifying the right mix of people for every discussion. This onboarding kit will walk you through how to:



## Notify Your People

Send clear communications to set expectations.



## Generate Engagement

Get early adoption use the panel strength and recommendation engine..



## Leverage Super Influencers

Identify influencers to champion the platform.



## Build Traction

Ask your first question within a week.



\*\*This first email comes from you. The rest will come directly from Wizer

## TIPS

Sending a notification email helps sets the scene.

Short emails with directives get the most response.

# Notify Your People

## 1st Email

**Subject:** Your Wizer Decision Profile is ready — discover how you make decisions

Hi [Team Name],

We're launching Wizer to get smarter about how we work together. Your first step is to complete your **Wizer Decision Profile** — a quick 4-minute experience that reveals how you think, decide, and contribute to group outcomes.

This isn't just another personality test — your profile becomes part of a **live system** that helps us:

- ✓ Involve the right people in the right decisions
- ✓ Improve how we collaborate
- ✓ Uncover untapped strengths across the team

You will receive an email from Wizer click on the link in the email. Set up your account in four easy steps:

### 4 quick steps:

1. Enter in your name and Details
2. Complete your Decision Profile
3. Answer the questions that come through

### Before you go hit reply and tell us:

Who of our people (internal or external) would you most likely grab a coffee with?

“Working with people just feels natural to me.  
We get further when we go together.

I’m not about going it alone. The best decisions are  
the ones we shape together.”



Decision Profiles

# Follow up Email

**Subject:** Haven't had a chance to jump into Wizer yet?

Hi [Name],

Just a quick nudge—if you haven't yet taken your Decision Profile, now's a great time. It only takes 10 minutes and will give you a new way to understand your strengths when it comes to collaboration and decision-making.

Check your inbox for an email from Wizer.

Let me know if you have any questions or need help getting started!

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## Create Groups & Panels:

Groups and panels help you understand the makeup your organisation. Watch this set up video:

[www.wizer.business/walkthrough](http://www.wizer.business/walkthrough)

## Identify Your Super Influencers

We will help you identify ***the 5 super influencers*** in your organisation/stakeholders that will ensure the uptake of the platform. Send them an email (see next).

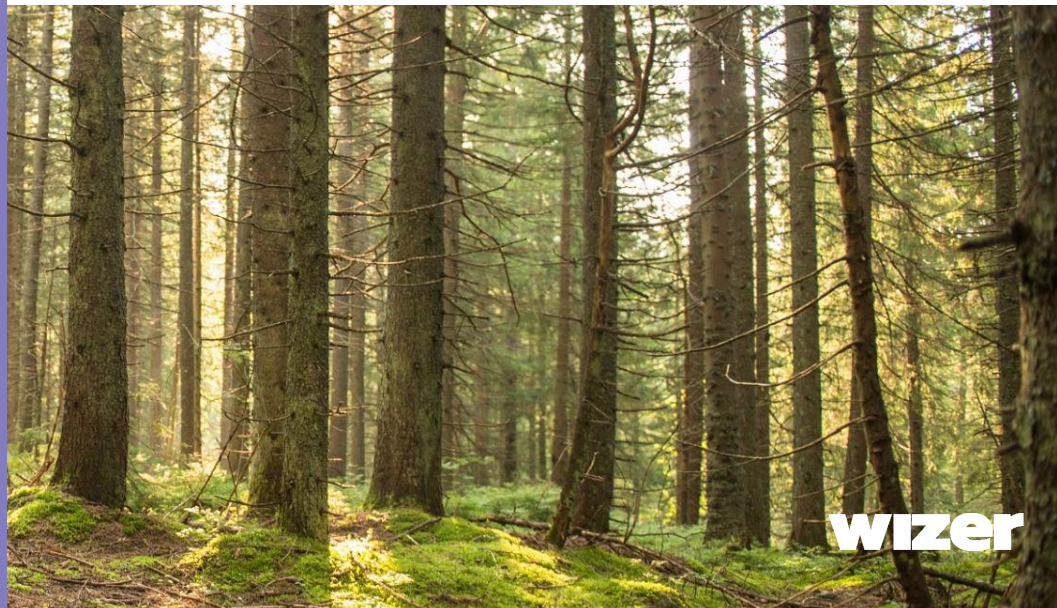
## Start with Decision Mapping

Before you even ask your team a question. Understand your people. Follow the steps in this video:

[www.wizer.business/decisionmapping](http://www.wizer.business/decisionmapping)

# Setting up for Success

Making sure these steps are completed before you start gathering insights ensures you will get the most out of Wizer's platform



**wizer**



Take the top 5 names people submitted in their email responses

These are your **Super Influencers**—the people others naturally turn to. They will ensure the uptake of the platform.

Send them this email



# Super Influencer Email

**Subject:** You've been identified as a Super Influencer

Hi [Name],

Based on responses from our people, you're one of the most connected in our network.

People turn to you for advice and perspective—we'd love your help championing our process with the Wizer Platform.

**If you've already been invited:**

- Make sure you complete your Decision Profile
- Start asking or joining conversations on Wizer

You will join be invited with you other Super Influencers to unique questions about how to increase engagement across our organization



# Example Kick off Questions

**Remember Wizer is about Action not Sentiment. So explore what you can build together:**

Here are a few questions to encourage open input and uncover insight:

- What's one thing we should stop doing to move faster as a team?
- What are we over-complicating right now?
- What's a decision we're dragging our heels on?
- Where are we under utilising talent?



## Tip 💡

*Look at your Recommendation Engine and Panel Strength indicators—understand who is missing. Invite them into the conversation*

# Example Strategic Questions

**Remember Wizer is about Action not Sentiment. So explore what you can build together:**

Some questions for strategic development:

- What's the boldest move we could make this year?
- Where are we playing it too safe?
- If we had to cut 20% of our time or budget, where would we start?
- What do you know now that you wish leadership understood?

## Tip 💡

*It is good to start with Open Questions.  
Then narrow your questions after you  
have broad input.*



# Example Product/ Innovation Questions

**Remember Wizer is about Action not Sentiment. So explore what you can build together:**

Use Wizer to shape new ideas and feedback loops:

- What's something our customers keep asking for?
- Where are we not innovating fast enough?
- What's a small improvement that would have a big impact?
- Which ideas are we ignoring that could actually work?



**Tip** 💡

*Look at panel composition—do you have a good mix of perspectives across functions?*



# Let's Build Decision Intelligence Together

You don't need a full  
restructure—just the right  
people involved at the right  
time. Wizer helps make that  
possible.

Ready to start?  
Send your first invite today.

[www.wizer.business](https://www.wizer.business)

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