



WELCOME TO
plumacademy

Plum Academy v1.3

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GETTING STARTED

First of all, thank you for choosing Plum to help with your hiring and team building process! We're always here to help you take advantage of the Plum system.

When you sign up with Plum, you will receive an email with a link to create your account.

ACCOUNT SETUP

FOR ADMINS

When beginning the free trial, you will be asked to create your account by entering your details, setting your password and inputting a few of your company details.



FIRST, LET'S GET TO KNOW YOU AND YOUR AWESOME COMPANY.

First Name

Pat

Company Name

ACME, Inc.

Last Name

Smith

Upload logo max size 400px x 400px (5mb)

Choose File

no file selected

Password

Company Size

Choose company size

Re-type password

Annual Hires

Choose number of annual hire

NEXT STEP: ADD JOB

By clicking "Next Step: Add Job," you agree to Plum's [terms of use](#) and understand our [privacy policy](#).

Made with ❤️ in Waterloo

LOGGING IN


After your account is setup, you can login at anytime by entering your email address and the password you chose at <https://app.plum.io/login>.

Note Your session expires after 60-minutes of inactivity. You will just need to login again to start a new session.

ADDING A JOB

FOR ADMINS

You will automatically be taken through the Add Job wizard when you first sign up.

If you are an admin on the account, you can add new jobs anytime by clicking the  ADD Button button in the top-left of the screen in your Job List.

NAMING YOUR JOB & CATEGORY SELECTION

Name your job anything you want. This name is what will appear in your job list as well as to applicants when they register to take the Plum Talent Assessment for this job.

Enter the location of the job here as well. Just start typing in the address and the system will automatically lookup the full address (if the job is remote, you can enter that instead).

Set the category of the job. If you cannot find a category that corresponds with your job, select "Other."

Select which documents you want applicants to upload. We check resume by default, but not cover letter.

Note When checked, the applicant will be required to upload the corresponding document.

NOW, LET'S ADD A JOB SO YOU CAN START ACCEPTING APPLICANTS RIGHT AWAY.

Position Name *required*

Ex. Software Developer

Location *required*

Job Category *required*

Select Role Type

☒ Ask applicants for resume?

☐ Ask applicants for cover letter?

If above are selected, applicants will be required to add the appropriate documents.

NEXT STEP: ASSESSMENT LINK

APPLICANT ASSESSMENT LINK

This is the link we generate for each of your jobs. If you post your job on your own careers page, you'll want to add this link as your apply button/link. If the job boards you advertise with allows for links in the job post, use this there as well.

SHARE THIS LINK WITH YOUR APPLICANTS

Copy & paste this link to your job post and/or email this link to anyone you want to apply to this job.

[See what your applicants will see](#)

Will open new window/tab

<http://bit.ly/1Oien9O>

EMAIL

[EMAIL button not working above? View email template](#)

Don't worry, you'll be able to get this link later if you don't want to share it right now.

NEXT STEP: TEAM MEMBERS

We also provide an email button with a pre-written template. Click EMAIL and your preferred email program will open up and a new email to send will be created. Just add the name of the applicant you want to send the assessment to, and sign off at the end like you normally do (edit the text of the email if you want as well).

Note If you do not have an email program that opens when you click email links on websites, we also provide the email template. Click "Email button not working? View email template" and simply copy and paste the text into your preferred email program.

ADDING TEAM MEMBERS

Often hiring for a job involves multiple people. Hiring managers can be added while adding or editing an a job. Click INVITE NEW MEMBER and provide the email address of the team member you wish to add (first and last name are optional). Plum will notify them by email that they have been added. If they do not have an account yet, our system will email them instructions on how to create one.

You can add two types of team members:

Hiring Manager - This is a person (or people) that you want to be able to monitor the job and view applicant's profiles and resumes, etc. Hiring managers can manage the applicant pipeline and can take the Match Criteria Survey. *continued...*

ADDING TEAM MEMBERS continued

Top Performer - This is usually an employee that you find excels in the same or similar job that you are hiring for. It is best to gather the opinions of those that know the duties and expectations of the job as it gives the Plum system a more accurate picture of what your unique job requires. Adding someone as a top performer only gives them the ability to take the Match Criteria Survey for the job. They will not be able to see any applicants or manage any area of the job.

DO YOU HAVE ANY TEAM MEMBERS THAT YOU WANT INPUT FROM FOR THIS JOB?

Invite hiring managers and *top performers from similar jobs* so they can take the Match Criteria Survey and/or manage applicants for this job.

INVITE NEW MEMBER

CURRENT TEAM MEMBERS ADDED TO THIS JOB

You ACCEPTED May 7, 2016
matt+0507academy@plum.io

OWNER

NEXT STEP: MATCH CRITERIA

Note If using our free trial or signed up for the Basic plan, you can only add two (2) team members per job, including yourself. You can always upgrade to a higher plan to get unlimited team members per job.

ADDING NEW MATCH CRITERIA

Plum Match Criteria are used to calculate the Plum Match Score for each of your applicants in any given job. To create Match Criteria for a job, click the CREATE NEW MATCH CRITERIA button which will take you to the Match Criteria Survey.

LET'S TAKE ABOUT 7 MINUTES AND CREATE MATCH CRITERIA FOR YOUR JOB!

CREATE NEW MATCH CRITERIA

[Not now take me to my list of positions.](#)

Match Criteria is created by you, your hiring managers, and your top performers of the same or similar role. Very often the immediate supervisor and those that perform the job best have the most accurate opinion of what behaviors and traits are need to be successful. Match Criteria are made up of the top-6 factors calculated from your Match Criteria Survey. The higher the factor appears in your results, the more important you indicated that factor to be for that job.

ADDING NEW MATCH CRITERIA *continued*

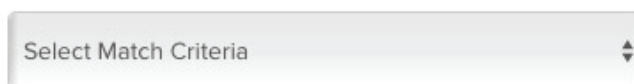
You can create (or have hiring managers/top performers create) Match Criteria at anytime during the hiring process. You **DO NOT** have to wait for Match Criteria to be created before you start accepting applicants. As soon as you get the job's assessment bit.ly link when creating said job, you can begin sourcing as soon as you want. We calculate Match Scores on the fly, so whenever you create your Match Criteria, we will apply it to all previously applied applicants in that job as well as future applicants.

ADDING PREVIOUS MATCH CRITERIA

As you use Plum for your hiring needs, you will have Match Criteria you or your team created for previous jobs that you would like to add to a new job. For one, the job may be the same as a previous job, but you like to keep your applicants separated by hiring time frames. We make it easy to add any previously created Match Criteria to a job.

If other Match Criteria exist, you will see a drop down selector that lists other Match Criteria. Simply choose a Match Criteria you want to add and when you are done, click the "Save & return to job list" button. Any Match Criteria added will now be available in the Applicant Dashboard for this job.

ADD MATCH CRITERIA TO THIS JOB



CREATE NEW MATCH CRITERIA

[Save & return to job list](#)

MATCH CRITERIA SURVEY

The Plum Match Criteria Survey is a series of questions that takes 5-8 minutes to complete. We ask what you are looking for in an employee for the particular role. When completed, our system determines the Match Criteria for the role. *continued...*

MATCH CRITERIA SURVEY continued

To take the survey, simply click on **MATCH CRITERIA** in your job list or the **CREATE MATCH CRITERIA** button in any applicant dashboard. You will then be asked to choose statements that you feel are most important and least important to the role. At the end of the survey, you may have traits that are tied. In this case, we will ask you to rank these tied traits in order of importance. Once that is complete, we will present you with the six criteria you determined were most important to the role. You can name, accept and apply your new criteria to the job, or you can edit your answers.

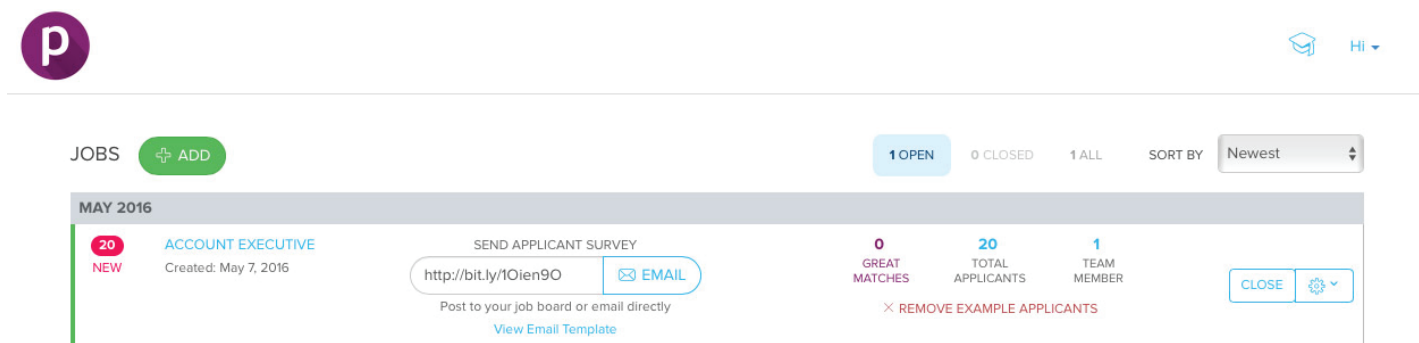
You can edit your already created Match Criteria (and rename it if you like) in any job by clicking **EDIT YOUR MATCH CRITERIA** in the applicant dashboard of the job you wish to edit your match criteria or clicking **MATCH CRITERIA** in a job in the job List.

Least Important		Most Important
<input checked="" type="checkbox"/>	Adjusting to other peoples' differences -- their strengths and weaknesses.	<input type="checkbox"/>
<input type="checkbox"/>	Contributing to building a positive team attitude	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Dealing positively with obstacles and failures	<input type="checkbox"/>
<input type="checkbox"/>	Developing innovative approaches and ideas to solve difficult problems	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Developing plans to organize, and accomplish work	<input type="checkbox"/>
<input type="checkbox"/>	Displaying sensitivity in difficult social situations at work	<input type="checkbox"/>
<input type="checkbox"/>	Interacting with coworkers, clients, or customers in a courteous manner	<input checked="" type="checkbox"/>

Example of a Match Criteria Survey question

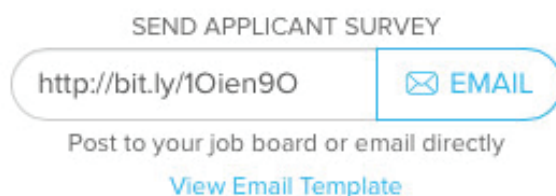
JOB LIST

This is where all of your jobs reside and is the first place you are taken every time you login. Clicking the Plum logo in the top-left corner of any page will bring you back to your Job List.



SENDING APPLICANTS TO DISCOVERY SURVEY

This is the same process as when you are adding a job, but we also place it here for every job so the assessment link is easy to get to at all times.



Applicants can be directed to take the assessment in two ways:

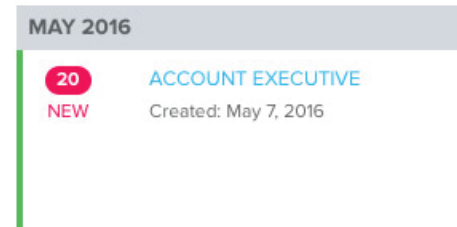
Email an applicant: Plum makes it easy to email applicants with a request to complete the assessment. Clicking EMAIL will open your default email program with a pre-written message that's ready to be sent. BCC multiple email addresses to batch send these requests. When using an Applicant Tracking System (ATS), use this email as your template.

Add to your job post: Plum links can also be added directly to your job posts. For instance, on your careers page on your website or on job boards that allow the use of external links. Every job receives a custom bit.ly link to an application form for that job.

Either way you choose to send applicants to the Talent Assessment, Plum will collect their resumes and cover letters, direct them through the assessment, and calculate their match for the role. We think it's pretty magical.

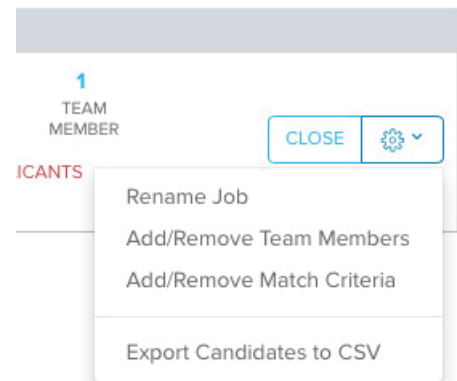
VIEWING APPLICANTS

Once you have applicants applying to your job(s), you will be able to view them by clicking on the name of the job or on the number of Total Applicants in your job list. This will take you to the Applicant Dashboard for that job.



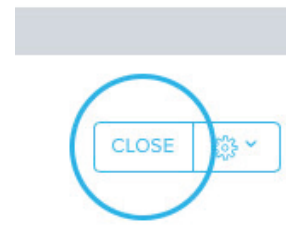
EDITING YOUR JOB (SETTINGS)

You can edit your job by clicking the gear icon on the right side of each job. Here you can rename your, add/remove team members, and add/remove Match Criteria.



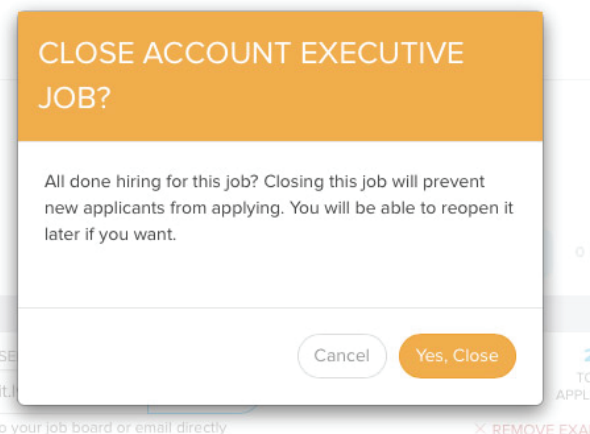
CLOSING JOBS

You can close your jobs by clicking the CLOSE button on the right side of each job. Closing your job prevents new applicants from applying. You will still be able to view already applied applicants.



When closing a job, you will be asked to confirm if you really want to close the job.

Your job's status will be changed to CLOSED. To reopen your job, click the OPEN button where the CLOSED button was previously.

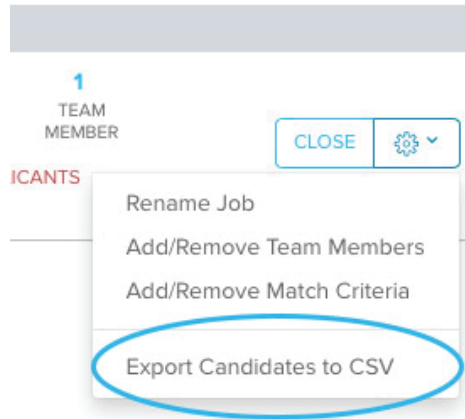


Note We add 20 example applicants when you create your first job to make it easier to understand how our system works. You will notice 20 new applicants when viewing your job list for the first time. You can remove them by clicking REMOVE EXAMPLE APPLICANTS under the total applicant count.

EXPORTING APPLICANT DATA

FOR ADMINS

You can export your applicant data which includes all of their scores from the Talent Assessment as well as match scores for all Match Criteria applied to the job. To export, click the gear icon to the right of any job and select **Export Candidates to CSV**.



APPLICANT DASHBOARD

This is where you review your applicants for any given job. When a Match Criteria is set, we sort your applicants by highest Match Score by default.

APPLICANT LIST

The list on the left is your applicant list. You will find applicants Match Score, name, applied date, whether they are a new applicant since your last login, and if they have uploaded a resume and cover letter (hover over their card to see their resume and cover letter.)

The screenshot displays the Applicant Dashboard. On the left is a sidebar with a search bar and filters: 0 HIRED, 0 SHORTLISTED, and 20 TO BE REVIEWED. Below these are four applicant cards: Frederick Example (99 MATCH), Paul Example (81 MATCH), Maximillian Example (75 MATCH), and Lisa Example (70 MATCH). The main area shows a detailed view for Frederick Example, including his email (example2@plum.io), buttons for SHORTLIST and REJECT, and a section titled 'MATCHING FACTORS FOR THIS ROLE'. This section lists four factors: CRUCIAL (ORDERLINESS, 98TH PERCENTILE), INTELLECTUAL DISPOSITION (96TH PERCENTILE), and INDUSTRIOUSNESS, each with a description of how Frederick's traits align with the role requirements. A legend at the top right indicates the match quality scale: Excellent (green), Strong (light green), Good (yellow), and No Match (red).

You can search for applicants by typing into the Search box at the top of the Applicant List. You can search first or last name and the list will filter as you type. You can also sort by APPLY DATE or MATCH by clicking the corresponding sort option at the top of the Applicant List located under the search bar.

This partial screenshot shows the top of the Applicant Dashboard. It includes a search bar labeled 'Search Applicants', a 'Sort by' section with 'MATCH' and 'APPLY DATE' buttons, and the beginning of the filter bar showing '0 HIRED' and '6 SHORTLISTED'.

MATCH SCORE

Plum calculates a match between each applicant and the behavioral needs of a job, called the Plum Match Score. This score is expressed as a number, ranging from 11 to 99. High scores represent a better match.

A “good” match starts at 70: these applicants can be expected to have some (but not all) of the needed dimensions.

If there are more than one Match Criteria that can be set for the job (multiple team members have taken the Match Criteria Survey for the role), and you select another Match Criteria from the drop down in the top-left of the Applicant Dashboard, the Match Score's of your applicants will update accordingly.



99 MATCH	Frederick Example Applied: Mar 4, 2015	>
81 MATCH	Paul Example Applied: Mar 4, 2015	>
75 MATCH	Maximillian Exam... Applied: Mar 4, 2015	>

REVIEWING APPLICANTS

The below steps are the preferred way to use the Plum system.

STEP 1

Create or select a Match Criteria so you can enjoy the benefits of Plum Match Scores.

STEP 2

Review applicants in the TO BE REVIEWED list with the highest match scores first by clicking on their name and viewing their profile.

STEP 3

Shortlist applicants that satisfy your initial review by clicking the SHORTLIST button in their Profile (more on Pipeline Management coming up).

STEP 4

If you want to clean up your applicant list, you can reject applicants you do not plan on shortlisting by clicking the REJECT button in their profile. Note that Plum does NOT send out a rejection email to the applicant when you reject them in our system. Correspondence with regards to interviewing and rejections are left to you.

You can print an applicant's profile by either clicking the Print icon to the left of their name (shown below) or use your browsers traditional way of clicking "File" then "Print" function.

PIPELINE MANAGEMENT

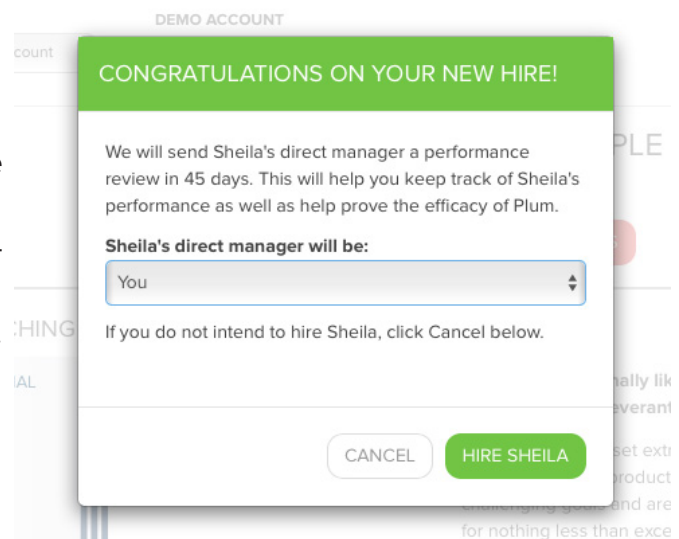
These buttons are how you move your applicants between categories. Plum uses To Be Reviewed (your default list), Shortlisted, Rejected, and Hired. In Progress simply displays those applicants that have not yet completed the Plum Discovery Survey (they are automatically sent reminders 24 hours and 72 hours after applying.)

You can move applicants between these lists as you see fit without losing any data between lists. This means if you reject an applicant, you can still view their entire profile in your Rejected list (located below your To Be Reviewed list) at any time and move them back to To Be Reviewed if you choose. Plum does NOT notify applicants when you move them in and out of pipeline stages. Correspondence with applicants outside of reminders for them to complete the assessment and account information regarding the assessment are left to you.



When you hire a candidate (candidate must be shortlisted first), an action sheet will pop up. Here, you will choose who the supervisor of your new employee will be. The default selection is you, but you can choose a hiring manager that was added to the job in the drop down. If the employee's supervisor is not listed, you can choose Add Email and then type in the email of the supervisor.

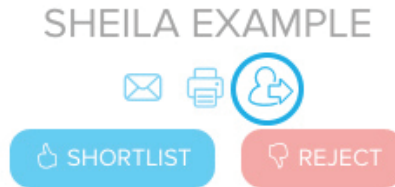
Once that is done, the supervisor will receive a performance review survey 45-days later. This survey helps prove the efficacy of Plum, as well as helps you keep track of employee progress



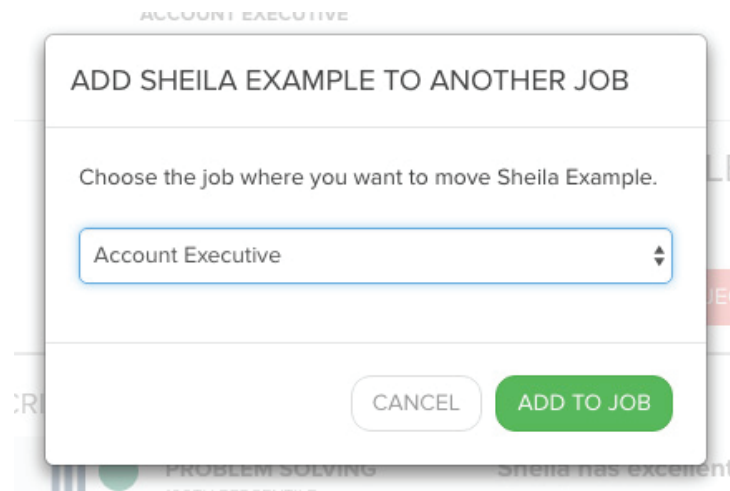
Note The applicant list is global to you and all other hiring managers assigned to that job. This means that if you shortlist, hire or reject an applicant, when another hiring manager assigned to the job logs in, they will see your changes and vice versa. At the bottom of every profile is applicant Activity that tracks any of these changes. Also, the applicant card itself will show who shortlisted, hired or rejected any given applicant.

MOVE APPLICANT

To move an applicant from one job to another, simply open the applicant's profile and click the **Move Applicant** icon.



A list of open jobs that you have access to will appear. Choose the job you want the applicant to be moved to and click **ADD TO JOB**.



Note The applicant **IS NOT notified** when you move them to another job. Also, if the applicant uploaded a resume and/or cover letter, they will also be copied to the new job application. Lastly, we call the feature Move Applicant, but what it is really doing is copying the applicant to the new job. They will remain in any job to which they originally applied.

INTERVIEW GUIDE

You can request an Interview Guide once you have shortlisted your first applicant in any job. After shortlisting an applicant, you will see the Interview Guide button appear under the SHORTLISTED heading.



INTERVIEW GUIDE *continued*

We build the Interview Guide based on the currently selected Match Criteria. Please give us up to 48 hours to deliver the guide once you've requested it. The average time is closer to one hour. The questions are based on the Match Criteria that is selected at the time of the request.

After we deliver the Interview Guide, you will be asked to choose six questions (out of 48) to use in your interviews. Make sure to ask the same questions to all of your candidates as this will provide you with a standard metric across all of your interviewees.







You will score each candidate on each of their answers based on a scale of 1, 2, or 3. 1 denotes that the candidate did not describe an experience/situation related to the question or their response was ineffective. 3 means they thoroughly described an experience/situation based on the question and their answer was highly effective.

MATCHING FACTORS FOR THE ROLE

These are based on your six Match Criteria traits which are calculated from the Plum Match Criteria Survey. Plum groups the top two traits derived from that survey as CRUCIAL to the role. The next two traits are considered IMPORTANT to the role, while the final two traits are considered USEFUL to the role. Crucial traits weigh the heaviest towards the applicant's overall match score; Important traits weigh less while Useful traits weigh less than both.

PLUM MATCH STRENGTH

To help determine how strong an applicant matches in any given Match Criteria trait, we provide strength symbols to the left of the trait name.

-  **Excellent** means that the applicant scored very high in the corresponding trait.
-  **Great** means that the applicant scored high in the corresponding trait.
-  **Good** means that the applicant scored above average in the corresponding trait.
-  **Average** means that the applicant scored average in the corresponding trait.
-  **Fair** means that the applicant scored below average in the corresponding trait.
-  **No Match** means that the applicant scored low in the corresponding trait.

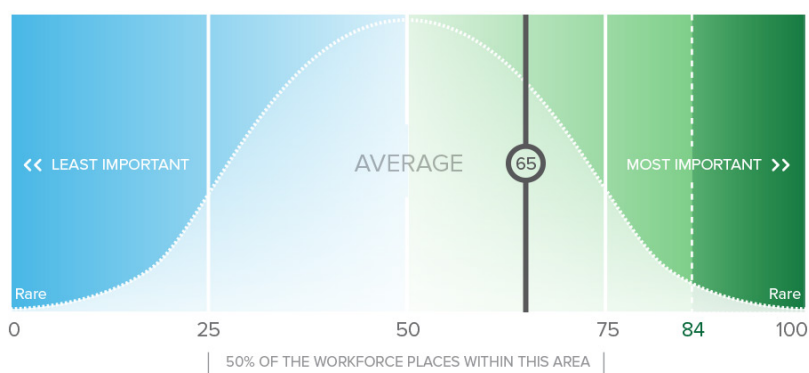
MATCH NOT RELEVANT TO THE ROLE

These are the six traits that you did not deem important to the role in the Match Criteria Survey. While these aren't important to the role, they can help with preparing for interviews and, if hired, fitting the new hire with your company's culture.

PERCENTILES

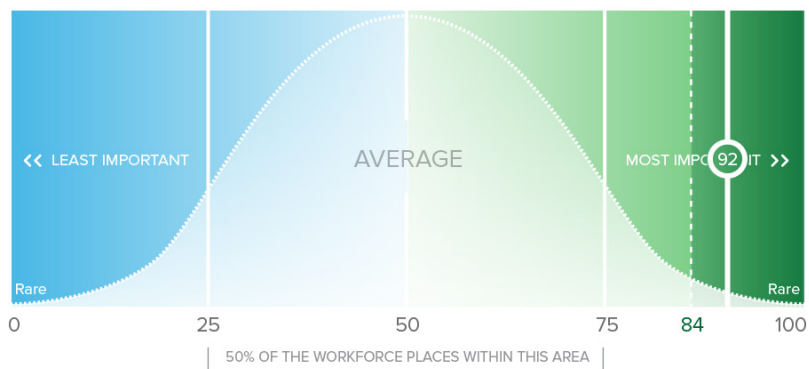
You may have noticed that we provide scores in percentiles. Percentiles are a means to divide or rank populations by standard distribution values. Plum uses its data to rank all applicants across the entire workforce. A Plum trait score can range from 0-100. **Applicants that score above the 84th percentile** consider that trait very important. Applicants that fall in the range of the 25th to 75th percentile of any given trait are average with regards to their prioritization of said trait. The below illustration of a bell curve shows how normal distribution works. In this example, the applicant scored in the 65th percentile in Industriousness and the 92nd percentile in Problem Solving.

EXAMPLE JOHN DOE SCORES IN 65TH PERCENTILE FOR INDUSTRIOUSNESS



Bell curve based on workforce distribution

EXAMPLE JOHN DOE SCORES IN 92ND PERCENTILE FOR PROBLEM SOLVING



Bell curve based on workforce distribution

PLUM TALENT BADGES

These are badges that the applicant earns when completing the Plum Discovery Survey. They are composites of the 12 traits that Plum assesses. Depending on how strongly they scored in each trait that makes up each talent, applicants can earn three levels of badges. Plum Purple badges are reserved for those applicants that scored in the top 5% of the workforce in that talent. Gold badges signify applicants that scored in the top 15% of the workforce while silver badges represent the top 40% of the workforce.

These are mainly for applicants, however employers find them useful as well. We don't recommend that you weigh these talents similarly to the Match Score, as the latter is much more predictive of performance and role fit than the former.



ACCOUNT MANAGEMENT

FOR ADMINS

The Account Management page allows you to view your credit card on file and your payment history.

7-DAY TRIAL

If you are still in trial, you will see an alert at the top of your job list indicating how many days are left in your trial. At anytime, you can click the Account Management link in that alert to be brought to your Account page, here you can complete the purchase process.

The screenshot shows the Plum user interface. At the top left is a purple circle with a white 'P'. At the top right is a graduation cap icon and the text 'Hi'. A green banner at the top states: 'Your trial has 7 days left. Add your payment information in [Account Management](#) to make sure your account isn't disrupted.' Below this is a 'JOBS' section with a green '+ ADD' button. To the right are filters: '1 OPEN', '0 CLOSED', '1 ALL', and a 'SORT BY' dropdown set to 'Newest'. The main content area is titled 'AUGUST 2016' and features a job listing for 'SOFTWARE DEVELOPER' created on August 11, 2016. It shows '20 NEW' applicants, a 'SEND APPLICANT SURVEY' button with a link 'http://bit.ly/2b1HdRi', and an 'EMAIL' button. Below the link is the text 'Post to your job board or email directly' and a 'View Email Template' link. To the right of the job listing are statistics: '0 GREAT MATCHES', '20 TOTAL APPLICANTS', and '1 TEAM MEMBER'. There is a 'CLOSE' button and a 'REMOVE EXAMPLE APPLICANTS' link.

PURCHASING WHEN IN TRIAL

When starting with a FREE TRIAL, to purchase a subscription for Plum you simply click on the Account Management link in the Trial Alert at the top of your job list, or click your "Hi" menu in the top-right of the screen and select **Account Management**.

Click the green **Buy Now** button to begin the purchasing process.

The screenshot shows the Plum user interface. At the top left is a purple circle with a white 'P'. At the top right is a graduation cap icon and the text 'Hi'. A green banner at the top states: 'Your trial has 7 days left. Add your payment information to make sure your account isn't disrupted.' Below this are two sections: 'SUBSCRIPTION INFORMATION' and 'PAYMENT HISTORY'. Under 'SUBSCRIPTION INFORMATION', it says 'Your account is in trial for 7 more days' and 'When signing up, you selected the **Pro** plan'. There is a green 'BUY NOW' button. Under 'PAYMENT HISTORY', it says 'No payments or invoices yet.'

PURCHASING UPFRONT (NO TRIAL)

Regardless if you are coming from our free trial or purchasing upfront, the process to pay is roughly the same. However, when purchasing upfront, you will be sent a link from our sales team that will guide you through the process of account creation and purchasing.

WE'RE SO HAPPY YOU DECIDED TO JOIN PLUM!
First, let's get to know you and your awesome company.

Email <input type="text" value="pat@example.com"/>	Company Name <input type="text" value="ACME, Inc"/>
First Name <input type="text" value="Pat"/>	Last Name <input type="text" value="Smith"/>
Choose a password <input type="password"/>	Upload logo (max size: 400px wide, height: 400px) <input type="button" value="Choose File"/> no file selected
Re-type password <input type="password"/>	Company Size <input type="text" value="Choose company size"/>
	Annual Hires <input type="text" value="Choose number of annual hires"/>

NEXT STEP: PAYMENT

By clicking "NEXT STEP: PAYMENT," you agree to Plum's [terms of use](#) and understand our [privacy policy](#).

Made with in Waterloo

On the payment page, you can choose to pay monthly or annually. Paying annually will save you 10%.

PAY

PRO
Up to 48 annual hires
\$745 USD
per month + tax where applicable

ADD YOUR CREDIT CARD Secure Form

Name on Card <input type="text" value="Scrooge McDuck"/>	Billing Country <input type="text" value="Choose Country"/>						
Card Number <input type="text"/>	Billing Province <input type="text" value="Choose Province"/>						
Expiry <div><input type="text" value="Exp Month"/> <input type="text" value="Exp Year"/></div>	Do you have a Promo Code? <div><input type="text"/> <input type="button" value="Apply"/></div>						
CVV <input type="text"/> <small>3 digits on back</small>	<table><tr><td>SUBTOTAL</td><td>\$745 USD</td></tr><tr><td>TAXES</td><td>\$0</td></tr><tr><td>TOTAL</td><td>\$745 USD</td></tr></table>	SUBTOTAL	\$745 USD	TAXES	\$0	TOTAL	\$745 USD
SUBTOTAL	\$745 USD						
TAXES	\$0						
TOTAL	\$745 USD						

Purchase Subscription