betterworks

Scheduled Conversations
User Manual

Scheduled Conversations in Betterworks provide an easy way to ensure your organization's communication is structured and consistent.

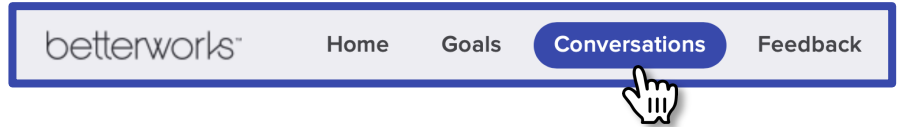This user manual will provide an overview of the different ways you can utilize this module.

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Table of Contents

Basic Usage

Step 1

Click on "Conversations" in the navigation bar at the top of the screen.

betterworks   Home   Goals   **Conversations**   Feedback

Step 2

Click on "Answer" to open your Scheduled Conversation.

Manager View

Direct Report View
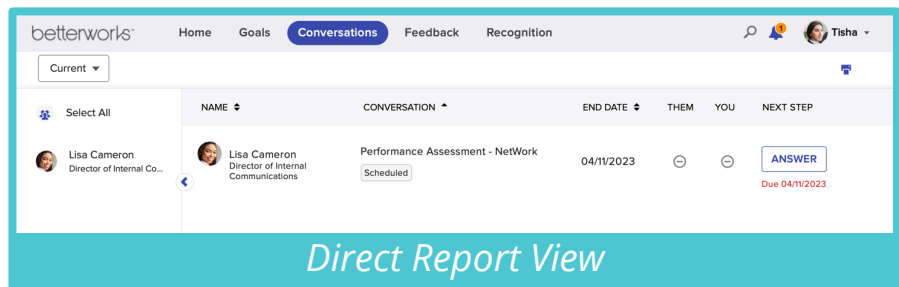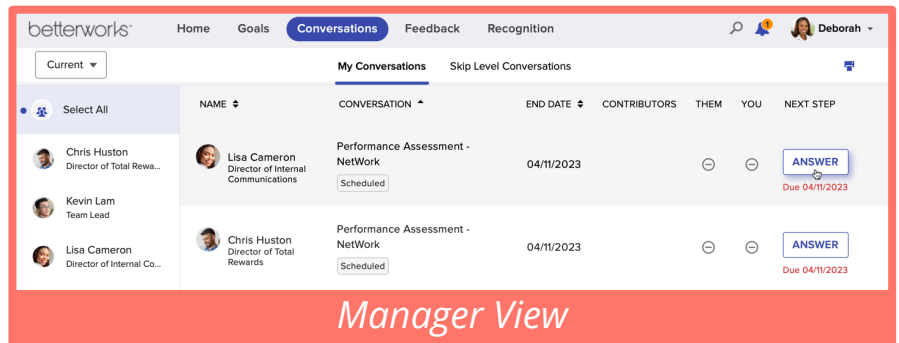
Step 3

Input your answers to each question.

Performance Assessment - NetWork
Due 04/11/2023

1. What are some recent examples of times they were highly effective?   04/10/2023

> Lisa has consistently shown her leadership qualities when challenging circumstances arise. The Comms team had a number of resignations within a small window of time, which left them with minimal resources and a number of relatively new employees

Step 4

Click "Save" to return to your answers later. Click "Share" to share your answers. Your answers remain editable until the due date.

> attempt to secure the budget for an assistant that can help manage scheduling, tasks, etc. to free up some more of Lisa's time.

SAVE ANSWERS   SHARE
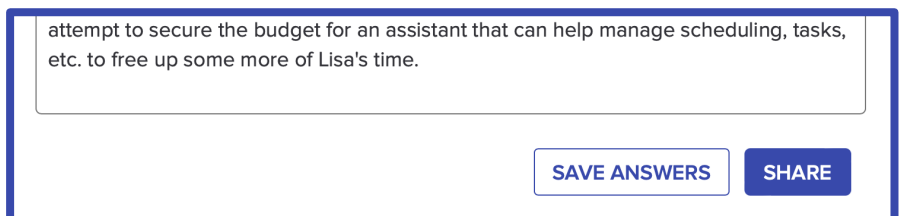
Additional Features

Conversation Tags

You may encounter situations where you have different Conversation types active at the same time. Your Conversation list will include tags that identify the Conversation types.


Performance Snapshot

This feature provides visibility to statistics on Goals, Conversations, Feedback, and Recognition that can be useful to review when responding to Conversation prompts.

Performance Snapshots are accessible within your Conversation, your profile page, or the profiles of users in your reporting line or admin scope.

Editing a Locked Form

If you wish to edit a completed Conversation after the due date has passed, you can click on the gear icon and select "Request to Edit."

View edit history

Request to edit
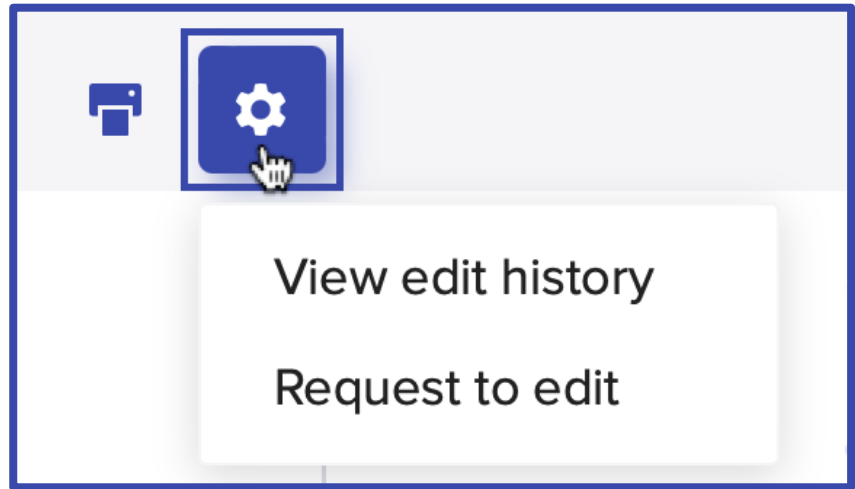
Manager Changes

If an individual's manager changes within a Conversation cycle, the new manager will be prompted to take over the Conversation with their new direct report (only one manager can complete the conversation).

The new manager can decline this if the original manager is going to handle the Conversation. The new manager cannot take control of the Conversation after the due date.

Performance Assessment - NetWork

Take ownership of this conversation?

Opening this incomplete conversation between Kevin and their previous manager will transfer ownership to you. Do you have approval to take over and complete this conversation?

NO   YES
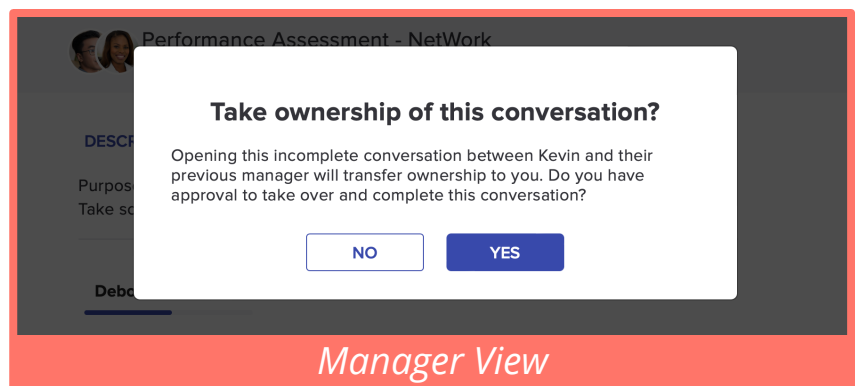
Manager View

Optional
Features

Betterworks allows administrators to customize Scheduled Conversations with a number of powerful features.

The following pages will highlight some of the optional configurations you may encounter as an end user.

Admin Review

If this feature is enabled, your Conversation responses will first be submitted to admins for a predetermined review period before you are able to share them more broadly.
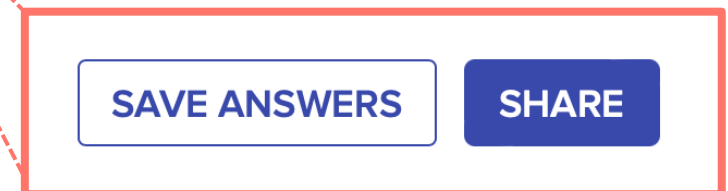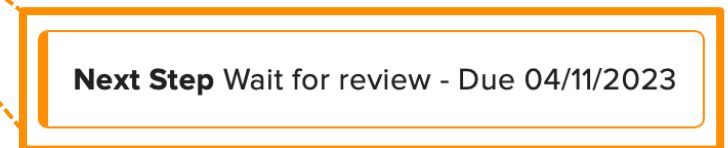
After completing all of the required Conversation fields, click "Submit" to send your responses to your admins for review.

Admin review deadlines must be shared by the admin/HR team; these will not be communicated within Betterworks.

Once the deadline has passed for admins to review these submissions, you will need to return to the Conversation and click the "Share" button in order to disseminate your responses. Responses that have been "Submitted" will not "Share" automatically once the Admin Review period ends.

Performance Assessment - NetWork+

Are you sure you want to submit?

Your system administrator can see your answers after you submit them. You'll be able to make changes until the date that appears in the reminder section at the top of the page.

CANCEL   SUBMIT

I will ensure during our 1:1's that I'm checking in on the topic of delegation. I will also

SAVE ANSWERS   SUBMIT

Next Step Wait for review - Due 04/11/2023

SAVE ANSWERS   SHARE

Create Goals

If enabled, you will have the ability to create goals from within your Conversation. These goals will show up in a sidebar on the right-hand side of your screen.

Goals   Feedback

| Sara | Debo... |

Current ▼

Create a best-in-class onboarding process by the end of Q2 2023.   0%

CREATE GOAL

Confirm Meeting

Your Scheduled Conversation may be designed to supplement to a meeting (e.g. meeting with your manager for your performance review). If enabled, you will see a button that allows you to confirm that this meeting took place. Either the manager or the direct report can click "Confirm Meeting."

After you meet with Deborah, please confirm meeting here: **CONFIRM MEETING**

Shared on 04/18/2023

Lock Options

All questions or specific questions can be set to lock prior to the end of the Conversation cycle. You will be notified if this is the case.

If answers do not lock before the conversation end date, they can be edited up to the end date, even if they have been shared.

3. How can you help increase their effectiveness?
Answer by 04/10/2023

> Type your answer here…

Confidential Questions

Responses to these questions are only visible to admins. Audience visibility will be called out in the interface. If enabled, you must share answers to both primary and confidential questions.

Due 04/11/2023

Only Admins & your skip level managers will be able to see your answers

1. What is the employee's overall performance rating? *
☐ Below Expectations
☐ Meets Expectations
☐ Exceeds Expectations

Skip-Level Permissions

If enabled, Managers can have skip-level visibility into Conversations. The number of levels is configurable by administrators. Skip level managers may have access to view and/or edit a conversation.

My Conversations   **Skip Level Conversations**

▼ Choose a manager to view their conversations

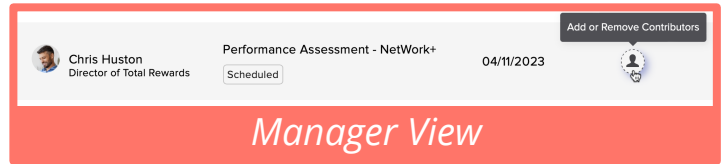| CONVERSATION WITH ⇕	CONVERSATION ⇕	END DATE ▲	CONTRIBUTORS
John Haynes-Rivera Project Manager	Performance Assessment - NetWork+ Scheduled	04/11/2023	
Tisha Pirani Project Manager	Performance Assessment - NetWork+ Scheduled	04/11/2023	

Manager View

Additional Contributors

There may be value in gathering responses from other people in the organization for a Scheduled Conversation (e.g. gathering feedback from peers and stakeholders for a performance review).
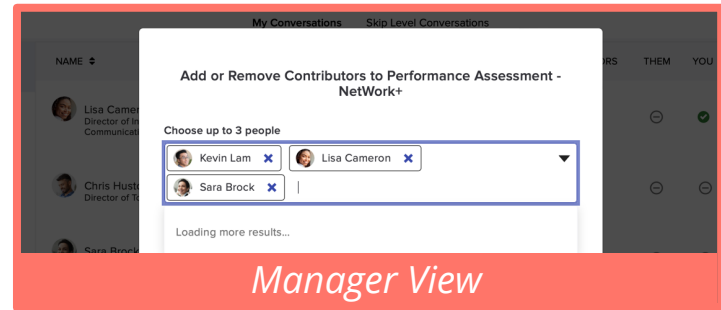
Admins can enable Managers to invite up to 3 additional contributors to a Conversation and can also determine the visibility that those contributors have to others' responses.

Contributors will complete the same set of primary questions as the manager.
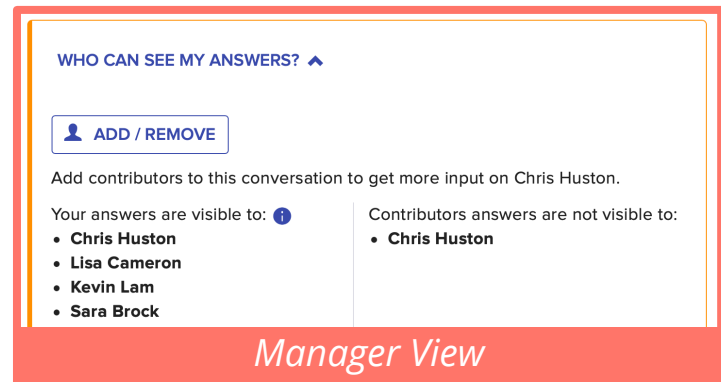
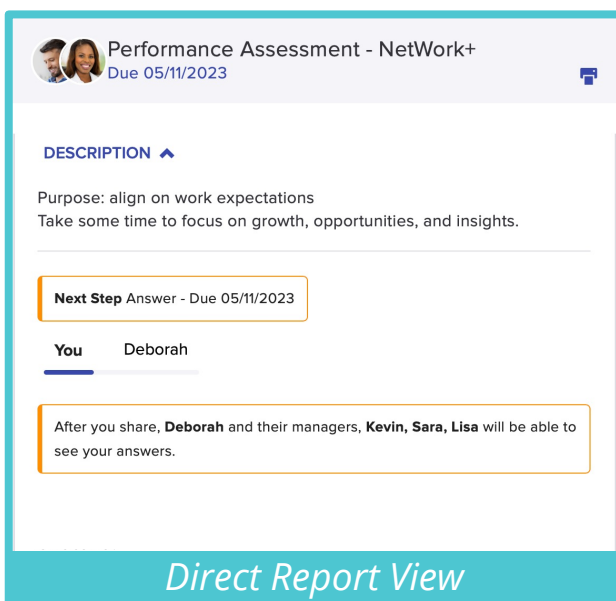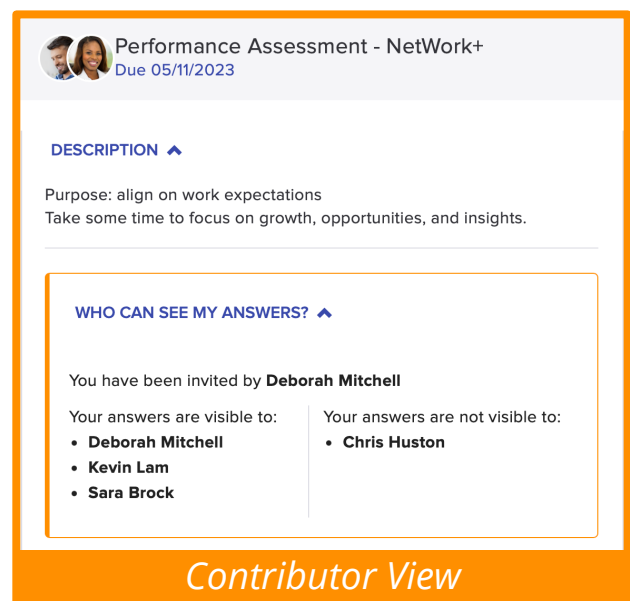Direct reports will not see the additional contributors' responses.

Manager View

Add or Remove Contributors

Chris Huston
Director of Total Rewards

Performance Assessment - NetWork+
Scheduled

04/11/2023

Manager View

My Conversations   Skip Level Conversations

NAME

Add or Remove Contributors to Performance Assessment - NetWork+

Choose up to 3 people

Kevin Lam ✕   Lisa Cameron ✕

Sara Brock ✕

Loading more results...

Lisa Cameron
Director of Internal Communication

Chris Huston
Director of To...

Sara Brock

Manager View

WHO CAN SEE MY ANSWERS? ▲

👤 ADD / REMOVE

Add contributors to this conversation to get more input on Chris Huston.

Your answers are visible to: ℹ
- **Chris Huston**
- **Lisa Cameron**
- **Kevin Lam**
- **Sara Brock**

Contributors answers are not visible to:
- **Chris Huston**

Manager View

Performance Assessment - NetWork+
Due 05/11/2023

DESCRIPTION ▲

Purpose: align on work expectations
Take some time to focus on growth, opportunities, and insights.

Next Step Answer - Due 05/11/2023

You   Deborah

After you share, **Deborah** and their managers, **Kevin, Sara, Lisa** will be able to see your answers.

Direct Report View

Performance Assessment - NetWork+
Due 05/11/2023

DESCRIPTION ▲

Purpose: align on work expectations
Take some time to focus on growth, opportunities, and insights.

WHO CAN SEE MY ANSWERS? ▲

You have been invited by **Deborah Mitchell**

Your answers are visible to:
- **Deborah Mitchell**
- **Kevin Lam**
- **Sara Brock**

Your answers are not visible to:
- **Chris Huston**

Contributor View