15Five Platform Training Script

Introduce 15Five - Provide background information on how you got here, why you chose 15Five, and how this fits into your company's overall management philosophy.

Project Slide Deck on 15Five as people gather in a training room or on a webinar

> **SUGGESTION**: We recommend configuring the Demo account so that it reflects the settings within your live 15Five account such as disabling features that you are not using at the moment.

Introduce yourself and give a quick agenda of the training

> **SUGGESTION**: "The Executive Sponsor will kick off the training by providing context, then I will lead you all through the 15Five platform training. Questions are encouraged throughout the training."

Advance the slide deck to share Success Outcomes and highlight the goals you have with 15Five

Share the pain points that have led you to purchase 15Five. This is the "How we got here" point.

> **Example**: Dispersed teams can lead to missed information and opportunity, we will use 15Five to gather feedback from all employees. New managers and management style have led to infrequent 1-on-1. We want to ensure we are continually growing our employees skills and addressing your roadblocks early, we will use 15Five to address this gap in process.

Share why you chose 15Five and how this fits into your company's overall management philosophy.

Example: Tying areas of 15Five into your over performance review, standardizing the 1-on-1 cadence at your organization, or gathering feedback on a regular cadence to improve XYZ.

Advance the slide to share a rollout schedule

- Communicate the rollout timeline
- Communicate a very brief product and philosophy overview of 15Five.
    - **Example**: "15Five leverages leading psychological science to build technology that transforms the world of work. Our product decisions are guided by Positive Psychology and Positive Organizational Scholarship research from the world's top universities to unlock the potential of every member of the global workforce."
- Share learning Objectives
    - **SUGGESTION**: Today we will review the Check-in, High Fives, 1-on-1s, Request Feedback, Objectives, Reviews, and Engagement. We will also cover the use of 15Five from a Manager's perspective.

End powerpoint presentation and move into your 15Five demo account to review the features you will be using.

SUGGESTION: Log in to your demo account as Seth the CEO. You are welcome to log in as someone else. Just know that the names of Seth's direct report and manager in this script are from Seth's point of view.

Items to Call Out:

- 15Five is available on the web and mobile apps - today's training is focused on the web version.
- I am using a demo account instead of my personal account in order to show you all of the feature functionality.

- Features have tabs in the toolbar to the left side. Your account settings are in the upper right-hand side under the drop-down menu after selecting your name.

Check-in

Navigate to the Features button on the left side navigation, select Check-in

Background:

- You will spend 15 minutes a week reflecting on your workweek at the end of the week. Early the following week your manager will then review and engage with it in just five minutes.
- This Check-in includes a prebuilt framework to clearly identify and track progress on goals and Objectives, as well as a series of questions to surface challenges, celebrate wins, and recognize other employees.
- The Check-in allows the 1-on-1 conversation with your manager or your direct reports to focus on what matters most like prioritizing specific roadblocks and challenges, allowing valuable manager and employee face-time to remain strategic, efficient, and meaningful.

SCIENCE:

- *Self-reflection is critical for development because an activity becomes an experience only after it has been reflected on thoughtfully. (Learning Through Experience From Reflection - Marilyn Wood Duadelin)*
- *15Five helps to reduce the amount of energy required for reflection, thus supporting both managers and employees in their individual learning and performance. (Reflection is powerful for learning)*

- "At the top of your Check-in you will see your due date"

Navigate the cursor over to the lower right where the Reviewer is listed

- “Here you can see your manager over to the right side listed as your Reviewer”

Navigate the cursor over the blue text “who else can see my Check-in?” under the Reviewer

- “You can also hover over the blue text “who else can see my Check-in?” to see everyone who has access to your Check-in. The visibility is set so that you manager, your manager's manager, and so on have visibility into your check-in.”
- “By default your answers in the Check-in will be visible up the reporting line, however, you can make answers private to your immediate manager if you choose.”

Navigate to the Pulse question “How did you feel at work this week?”

Science:

- *Feelings are the first data point. The pulse question in the Check-in nudges you to reflect on how you feel at work, the first and most important data point that signals to your manager when things are going well and also when issues may arise. Remember that there is no wrong answer.*
- *It’s important to acknowledge feelings like disappointment, frustration, and stress early on to prevent issues from becoming major problems and so that you don’t let those feelings fester into an irreparable mindset about the workplace. (Learning Through Experience From Reflection - Marilyn Wood Duadelin)*
- *It’s also important to acknowledge when we feel the most excited, inspired, and engaged, and dig deep to understand what led to all that positivity.*

- *This is why we start by asking how you feel and then drill down into specific wins and challenges. Taking a moment to reflect on how our emotions relate to our work reveals what academics call inner-work life. When inner-work life is positive, you are more productive and find deeper meaning in your work.*

- "Each week you will fill out the pulse score "How did you feel at work this week?" on a scale of 1 - 5"
- "There is no wrong answer here. Everyone will gradually find their neutral. For some, that might be a 3 and others may be a 4."

Navigate to the blue text under the pulse score and click it

- "You can also add comments to your pulse answer by clicking on the blue text below the rating scale"
- "Add a comment when your pulse score doesn't tell the whole story. Offering additional context is especially useful when your score is lower or higher than normal."

Navigate to the Objective Section of the Check-in

SCIENCE:

- *Clear goals are critical for strong inner work life.*
- *Objectives help managers & employees gauge progress on work goals.*
- *Objectives also help managers give more effective feedback by tying it to the work.*
- *A third of the time feedback fails, doesn't improve performance, and can actually make things worse. For feedback to work, it's important to tie feedback to the goals, tasks, and work people do every day.*
- *30% of employees strongly agree that their manager involves them in setting their goals at work, those who do strongly agree with this*

statement are 3.6 times more likely than other employees to be engaged. (Gallup: Re-engineering PM, pg. 16)

- *Only 34% of employees strongly agree their manager knows that projects or tasks they're currently working on. (Gallup: Re-engineering PM, pg. 16)*

- *Gallup finds that only 20% of employees strongly agree they have had a conversation with their manager in the last six months about the steps they can take to reach their goals, and just 19% strongly agree they have reviewed their greatest successes with their manager in the same time span. (Gallup: State of the American Workplace, pg 80)*
- *Employees who strongly agree they have had conversations with their manager in the last six months about their goals and successes are 2.8 times more likely than other employees to be engaged. (Gallup: State of the American Workplace, pg 80)*
- *Employees whose managers help them set work priorities and goals are more engaged. (Gallup: State of the American Workplace, pg 20)*
- *Employee productivity increases by 56% on average when managers are involved in helping employees align their goals with the needs of the organization. Without manager involvement, productivity only improves by 6%, even with collaborative goal setting and feedback processes. (Gallup: Re-engineering PM, pg. 19)*
- *Employees who strongly agree their manager holds them accountable for their performance are 2.5 times more likely to be engaged. (Gallup: Re-engineering PM, pg. 28)*
- *According to Gallup, Employees who strongly believe that they can link their goals to the organization are 3.5x more likely to be engaged. Only 44% of employees see this connection. (Gallup: Re-engineering PM, pg. 17, Gallup: State of the American Workplace, pg 80)*

- “If you own an Objective in 15Five or a Key Result of an Objective you will see this section in your Check-in”
- “At a minimum you will set the stats for an Objective you own to on track as green, behind as orange, or at risk which is red.”

Navigate to the drop down carrot next to the Objective and expand to show the key results

- “You can also update progress being made on the key results for that Objective from within your Check-in”

Update the key result from 50 - 65

- “Updating a key result here will then update the percentage of completion for this Objective.

Navigate to the Priorities Section

SCIENCE:

- *Employees that to do less, prioritize and select a few activities to focus on, and obsess, dedicate all effort toward the priorities, “score an average 25% percentage points higher in their performance than those who pursued many priorities” (Do Less & Obsess: Hansen (2018). Great at Work)*
- *Due to Planning Fallacy, nobody ever achieves as much as they plan to - we dramatically overestimate how much we're going to get done in a given day or week.*
- *When managers keep a journal of key performance episodes, the quality of their feedback tends to improve, and their employees often react more positively to the evaluations.*

- *Only 34% of employees strongly agree their manager knows that projects or tasks they're currently working on. (Gallup: Re-engineering PM, pg. 16)*

- *The Check-in solves this problem because we always begin with objectives and priorities so managers clearly and easily understand what their team members are actually working on. This step alone will directly improve feedback.*
- *Additionally, feedback questions sit directly underneath priorities helping managers tie their feedback to the work, which makes it far more likely their feedback will impact performance.*

- Focus your time on what matters most. Ensure your goals don't get buried in day-to-day tasks by labeling them as a priority. People often underestimate how long tasks take. Stick to three priorities to increase your chances of success.
- "When you first log in, you will see a question prompting you to enter priorities for the following week "What do you intend to accomplish between now and your next report? This is where you will list your priorities."
- "What are you doing this week that moves the needle with what you are doing within your role?"

Navigate to check off a priority or two listed in the priority section

- "Once you've submitted your first Check-in you will have Priorities that you set for yourself to now check off noting that you've completed it"

Navigate to select the arrow icon on the right of a priority, then copy it priority over to the following week

- “If you did not complete a priority, there is an arrow icon to the right where you can copy it over to the following week”

Navigate the cursor to highlight the two priorities Seth already has that are linked to the Objective he owns

- “To keep your Objective top of mind, you can link a priority to an Objective you own.”

Navigate the cursor over the priority that has @DrewJartman

- “If you are looking to collaborate with a colleague in one of your priorities you can @ mention them but using the @ symbol”

Navigate to the Questions Section

SCIENCE:

- *The key for top managers to ensure employees have great inner work life (positive emotions, strong motivation, favorable perceptions of the organization) is by ensuring they make progress on meaningful work → by celebrating wins and removing obstacles as found by Harvard professor, Teresa Ambile. The two standard feedback questions we ask in every check-ins are based on Teresa Amabile’s research.*
- *Leaders in high performing organizations ask just as many questions as they provide answers. Academic research shows that encouraging employees to seek help leads to stronger job performance.*
- *Managers are able to quickly identify issues and @mention (loop in) the right people to provide the support their team members need when they need it.*

Background:

- To enable progress on meaningful work, we invite people to surface problems that prohibit them from making progress early and often to increase the speed of problem identification and resolution. Managers are able to quickly identify issues and @mention/loop in the right people to provide the support employees need when they need it.
- “Questions are the heart of 15Five this is where the conversations begin”
- We also always ask what’s going well to encourage employees to celebrate and acknowledge positive progress towards their work goals.

Navigate to the win & challenge questions

- “The two standard feedback questions we ask in every Check-in are to enable progress on meaningful work, we invite you to surface problems that prohibit you from making progress early and often to increase the speed of problem identification and resolution.”
- “We also always ask what’s going well to encourage you to celebrate and acknowledge positive progress towards your work goals.”
- “In addition to these standard questions, managers can pull from dozens of categorized feedback questions to include from our Question Bank. We empower managers to solicit quality employee feedback, avoid fire-drills, and help employees show-up as their best selves. Use questions as an opportunity to reflect. The more detailed you are in your answers, the easier it is to remember previous wins during performance reviews.”
- “These questions help prompt further conversations with your manager in your 1-on-1”

Navigate to another question that is not the win or challenge question

- “Some questions will rotate throughout months or quarters. Some questions are free form text, others might be metric questions”

- “Within questions you do have the ability to attach files if you would like. This is done by selecting the paperclip icon in the text box under a question.”

Navigate to the High Fives section of the Check-in

Background:

- *High Fives encourages all employees to recognize each other on a weekly basis. You can appreciate others for their contributions, both big and small.*

SCIENCE:

- *High Fives increase the positivity ratio and gratitude*
- *Recognition through High Fives helps increase the amount of positive communication often found in high-performing organizations.*
- *In high performing organizations the ratio of positive feedback to constructive feedback is ~ 3:1 (in low performing orgs, it’s reversed 1:3).*
- *Recognition also increases the likelihood for collaboration and support between employees. Adam Grant, organizational psychologist, Wharton professor, and bestselling author, talks about the big benefits of a little thanks. Grant explains that if someone thanks you for your help, you’re twice as likely to help them again in the future, and more than twice as likely to help someone else.*
- *Only one in three workers in the U.S. strongly agree that they received recognition or praise for doing good work in the past seven days.*
- *Employees who do not feel adequately recognized are twice as likely to say they’ll quit in the next year.*
- *[Gallup] Recognition not only boosts individual employee engagement, but it also has been found to increase productivity and loyalty to the company, leading to higher retention.*

- *High Fives don't just benefit the receiver of the High Five, they benefit the giver too! Sending a High Five is a way to express gratitude and [research shows] that people who express gratitude experience more positive emotions and well-being.*
- *[Gallup's] data reveal that the most effective recognition is honest, authentic and individualized to how each employee wants to be recognized*
- *[Gallup] According to employees, the most memorable recognition comes from an employee's manager (28%), high-level leader or CEO (24%), the manager's manager (12%), a customer (10%) and peers (9%)*
- *The strongest predictor of meaning at work is understanding your positive impact on others. Humphrey, S.E.; Nahrgang, J.D. et al. (2007) Integrating motivational, social, and contextual work design features: A meta-analytic summary and theoretical extension of the work design literature. Journal of Applied Psychology.*

- "The best formula for a High Five is calling out the behavior as well as the impact that it had"
- "To create a meaningful High Five, make sure that it's honest, authentic, and personalized."
- "You can High Five multiple people, a group, or one person"
- "You can make a High Five private by selecting the drop down carrot next to the word Public in your Check-in"
- "High Fives in the Check-in won't be sent out until the Check-in is submitted"
- "If you want to give a High Five to a colleague but don't want to wait until your Check-in is due, you can go to the High Five feature on the left side menu and give an instant High Five"

Additional actions you can take from your Check-in

- “There are many actions you can take as you fill out a Check-in”
- “If you ever want to make a comment or answer in your Check-in private - only visible to you and your manager - just use the lock icon to the right of the text box”
- “Emojis can be added throughout your Check-in. This is done by selecting the smiley face icon within the text box”
- “HyperLinks also work within the text boxes throughout 15Five”
- “@mentions can be used throughout 15Five as well to collaborate with colleagues, rope them in for conversation, or give them awareness into what you are working on”
- “The Check-in will save as a draft if you choose to fill it out a little each day throughout the week”

Navigate to and select the Submit button at the bottom of the Check-in

- “For employees, once you submit your Check-in, your manager will get a notification so that they can review and engaged with your submitted information”
- “For managers, once your employee submits their Check-in, you will receive a notification to go in and review it”

PAUSE - “What questions do you have?”

- “There are a variety of ways that you can engaged with your own submitted Check-in”

Navigate to the comment icon to the right of priorities

- “You can add comments with the chat bubble icon to the right of each section”
- “You can @mention someone within a comment”

Navigate to and select the ellipse icon to the right of a priority
Hover over and select the Add to 1-on-1 agenda button in the drop down

- “Your 1-on-1 is intended to be collaborative between you and your manager so you can use this to add things from your Check-in to your 1-on-1 agenda with your manager”
- “I would suggest adding a Priority or a Question to the 1-on-1 agenda. I like to add the question “What challenges are you facing? Where are you stuck?” for further discussion with my manager”

Hover over the “Add to wins & challenges” button in the drop down

- “Flag something as a Wins & Challenges. You can flag these so that it’s easy to reflect on your work when you are in a review cycle”
- “I would suggest adding the answer to your ‘What went well this week?’ question as a win.”

Hover over the “Flag for follow-up” button in the drop down

- “If you choose to flag something for Follow up, it will only show on your to do list within 15Five under your Home page or under Check-ins in the sub-section follow-ups”

Hover over the “Share by email” button in the drop down.

- “Lastly you have the option to share an item from the Check-in via email”

1-on-1s

Navigate to the 1-on-1s Feature

Background:

- The 1-on-1 feature is used to focus on what matters most like prioritizing specific roadblocks and challenges, without wasting valuable facetime on status updates. We want you to move beyond status updates to maximize the quality of conversations between your managers and your team members.
- 1-on-1 meetings will also save managers time (almost a day per month!) by reducing interruptions and through the type of problem-solving that can only occur through face-to-face conversations.

SCIENCE:

- *In alignment with Best-Self Management, Companies that continually focus on growth and development and regularly gauge employee morale through recurring and effective 1-on-1 conversations will be able to respond to employee challenges and triumphs in real time instead of only once each year.*
- *[Gallup] Managers account for up to 70% of variance in engagement.*
- *Weekly Works Best: Effective managers have weekly 1-on-1 meetings with their employees. At a minimum, 1-on-1's should be held at least monthly.*
- *Regular Check-ins (at least every 2 weeks) improve morale, trust, and engagement, as well as productivity and goal accomplishment. (Primary, Secondary)*
- *[Gallup] Employees whose managers hold regular meetings are almost 3x as likely to be engaged.*
- *[Gallup] When managers provide weekly (vs. annual feedback), people are 5.2x more likely to strongly agree they receive meaningful feedback, 3.2x more likely to strongly agree they are motivated to do outstanding work and 2.7x more likely to be engaged.*
- *Adam Grant: Outsourcing Inspiration: It's common for leaders to lack awareness of how their work makes a difference in the lives of*

employees. At each meeting its worth asking what you've done that has been most and least helpful and how employees have implemented the advice and suggestions you made in the previous meeting

- *Formal evaluations can be valuable, and managers have many reasons to use them. But success with the 11th element of engagement comes down to what happens between performance reviews. When a manager regularly checks in with their employees to review progress, team members are more likely to believe they get paid fairly, more likely to stay with the company, less likely to have accidents and more than twice as likely to recommend the company to others as a great place to work. (Gallup: State of the American workplace, pg 121)*

- "By default you will see all 1-on-1s with your manager as well as any direct reports if you have them"
- "Unlike the visibility in the check-in where your manager, your managers manager, and so on can see your check-in, the 1-on-1 is private to just the two individuals in the meeting"

Navigate the cursor to the "Create a new 1-on-1" button in the upper right-hand corner

- "You can schedule 1-on-1s with people outside your specific reporting structure by selecting the orange button titled 'Create a new 1-on-1' in the upper right-hand side and entering in a colleagues name"

Select Leah's 1-on-1 in the list of 1-on-1s. Navigate the cursor around the talking points section and

- "Both the manager and the employee can add talking points. 1-on-1s are intended to be collaborative."

Navigate the cursor over the Added by Seth or Added by Leah text.

- "Here you can see who added what talking points."

Navigate to the bottom of the Talking points section to highlight the blue text 'Add another talking point'

- "You can add a talking point from within the 1-on-1 through the text box at the bottom of the talking points section"

Navigate the cursor over the lock icon seen on Seth's talking points

- "You can make private talking points by selecting the lock icon. Note that private talking points are only visible to you. This is different then other private features in 15Five. Your manager and your direct reports will not have access to private talking points in your 1-on-1s."

Navigate the cursor over the show answer text next to Leah's talking point

- "Answers pulled in from the Check-in to the 1-on-1 are visible by the 'show answer' text to the right of a talking point with the drop down carrot to expand"

Navigate the cursor over the checkboxes and check off a few talking points

- "Once you are in your 1-on-1 meeting begin to check off the talking points that you have covered"
- "Your Talking Points will roll over to the next week if not checked off during the current 1-on-1"

Navigate to the Next Action Items section

- "Action Items can be assigned to one of the two people in the 1-on-1. Both manager and employee can add Action Items"
- "Action items will be added to the Home screen for follow up and visibility"

Navigate to the Notes section

- "There are two areas for notes in the 1-on-1. The first section is shared and will be sent in a summary email after the 1-on-1 has ended. The second section is for private notes."

Navigate the Schedule button in the upper right hand corner

- "You can connect your Google calendar to 15Five when you go to schedule your 1-on-1. The meeting invitation will include a link to the collaborative 1-on-1 agenda"

Navigate to the "Copy Link to 1-on-1" button in the upper right corner

- "Additionally, we suggest copying the link to the 1-on-1 and putting this in your recurring calendar invitation for this 1-on-1 meeting."
- "This way, both you and your colleague that you are meeting with will be able to open the most current 1-on-1 agenda in 15Five from the calendar invitation as you go to join the meeting."

Navigate to the End Select a date and time under schedule

- "Make sure to end your 1-on-1 after you have met."
- "In order to end your 1-on-1 you will be prompted to select a date."
- "Once a 1-on-1 is closed both people in the meeting will be sent as an email along with the public notes section"
- "You will not be able to edit the 1-on-1 after it has ended"

PAUSE - "Are there any questions?"

High Fives

Navigate to the Feature tab > Select High Fives

Science:

- *High Fives increase the positivity ratio and gratitude*
- *Recognition through High Fives helps increase the amount of positive communication often found in high-performing organizations.*
- *In high performing organizations the ratio of positive feedback to constructive feedback is ~ 3:1 (in low performing orgs, it's reversed 1:3).*
- *Recognition also increases the likelihood for collaboration and support between employees. Adam Grant, organizational psychologist, Wharton professor, and bestselling author, talks about the big benefits of a little thanks. Grant explains that if someone thanks you for your help, you're twice as likely to help them again in the future, and more than twice as likely to help someone else.*
- *Only one in three workers in the U.S. strongly agree that they received recognition or praise for doing good work in the past seven days.*
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- "Here you can High Five a group or multiple individuals in a High Five"
- "The best way to give a High Five is to describe the behavior and the impact that it had"
- "All High Fives given in the High Fives tab are public. You can only give Private High Fives from within your Check-in"

Navigate your cursor to the like and comment icons within a High Five

- "You can engage by liking or comment on a High Five in the High Fives feed"

PAUSE - "Are there any questions on High Fives, 1-on-1s, or the Check-in?"

Request Feedback

Navigate to the Feature tab > Select Request Feedback

SCIENCE:

- *Most of the time, feedback fails because it is unexpected, not actionable, not timely, easily disregarded, or only manager-led. A third of the time, this makes things worse.*
- *Asking for feedback is actually better for employee growth. By asking, we can make sure the feedback is about the work, and not about the individual. By getting feedback about the work, we can use it to grow.*
- *When weekly feedback is meaningful, team members are 3.5x more*

likely to be engaged at work.

- *Only 23% of employees strongly agree that their manager provides meaningful [performance] feedback to them, and 26% of employees strongly agree the feedback they receive helps them do better work. Those who strongly agree with these feedback elements are more likely to be engaged than other employees (3.5 times and 2.9 times, respectively), demonstrating the need for managers to learn how to coach their employees more effectively.*
- ***Be proactive and ask for feedback!*** *Why wait around for feedback when it's more effective to ask? According to Ghorpade (2000), it's important to request feedback from multiple people for a more complete view.*
- *Leverage the people that challenge you. Research shows we tend to drop our critics when we need them most (Green, Gino, & Staats, 2017). Organizational psychologist Adam Grant recommends identifying people in your "challenge network" who offer different perspectives and will empower you to improve.*
- *Practice Nonviolent Communication: first describe the situation, then name your feeling ("I feel…"), and make your request ("I need…") (Rosenberg, 2003).*
- *Separate positive and constructive feedback. According to Von Bergen, Bressler, & Campbell (2014), surrounding constructive feedback with positive feedback may feel better for the giver, but is confusing for the receiver.*
- *According to Yaeger et., al (2014), signal trust by communicating high standards and your belief in their ability to fulfill those expectations. For example, "I have very high expectations and I know you can reach them."*

Navigate to the "request feedback" button in the top right hand corner

- “In order to request feedback from your colleagues select the “request feedback” button in the top right hand corner”
- “You can then search or scroll in order to select a few colleagues”
- “We have included pro tips to help guide you. Everyone’s perspective is subjective so it’s important to ask for feedback from multiple people to get a full, unbiased view”
- “When typing out what you would like feedback on you will see a suggested question, either ‘What went well?’ or ‘What can I improve on?’”
- “By default your feedback request will only be visible to you and those you have requested feedback from”

Navigate to the check box down at the bottom

- “If you want your manager to see the feedback, check the box down at the bottom”

Navigate to the “send request” button at the bottom

- “Once you have filled out these areas, you then can press the “send request” button at the bottom”
- “After you have requested feedback from your colleagues you will see that you are “awaiting responses” from the request you sent in your Feedback tab.”
- “Once people start to reply to your request, their feedback will start to populate in”

Pause for question

- “If you have been asked to give feedback to a colleague, you will be notified either by email, slack, or in app”
- “In order to give feedback from the Request Feedback tab, listed on the right side you will see a Pending request”

- “The request will expire after 14 days and you will not be able to give feedback after that time”
- “Enter in your feedback using the tips found under Pro Tips to the right”
- “First separate positive and constructive feedback. Surrounding constructive feedback with positive feedback may feel better for the giver, but is confusing for the receiver”
- “Use this one sentence to make feedback 40% more effective; “I am giving you these comments because I have very high expectations and I know you can reach them”
- “For feedback to be effective, keep it about the work not the person. First describe the situation, name your feelings (“I feel…”) then make your request (“I need…”)”

Navigate to the bottom of the text where the visibility is shown

- “At the bottom you will see what the visibility settings are for that feedback request. Either just visible between you and the asker, or you, the asker and their manager”

Navigate to the “send feedback” button

- “Once you have entered in your feedback, select the “Send feedback” button”

Objectives

Navigate to the Feature tab > Select Objectives

SCIENCE:

- *Clear goals are critical for strong inner work life.*
- *Objectives help managers & employees gauge progress on work goals.*
- *Objectives also help managers give more effective feedback by tying it to the work.*

- *A third of the time feedback fails, doesn't improve performance, and can actually make things worse. For feedback to work, it's important to tie feedback to the goals, tasks, and work people do every day.*
- *30% of employees strongly agree that their manager involves them in setting their goals at work, those who do strongly agree with this statement are 3.6 times more likely than other employees to be engaged. (Gallup: Re-engineering PM, pg. 16)*

- *Only 34% of employees strongly agree their manager knows that projects or tasks they're currently working on. (Gallup: Re-engineering PM, pg. 16)*

- *Gallup finds that only 20% of employees strongly agree they have had a conversation with their manager in the last six months about the steps they can take to reach their goals, and just 19% strongly agree they have reviewed their greatest successes with their manager in the same time span. (Gallup: State of the American Workplace, pg 80)*
- *Employees who strongly agree they have had conversations with their manager in the last six months about their goals and successes are 2.8 times more likely than other employees to be engaged. (Gallup: State of the American Workplace, pg 80)*
- *Employees whose managers help them set work priorities and goals are more engaged. (Gallup: State of the American Workplace, pg 20)*
- *Employee productivity increases by 56% on average when managers are involved in helping employees align their goals with the needs of the organization. Without manager involvement, productivity only improves by 6%, even with collaborative goal setting and feedback processes. (Gallup: Re-engineering PM, pg. 19)*
- *Employees who strongly agree their manager holds them accountable for their performance are 2.5 times more likely to be engaged. (Gallup: Re-engineering PM, pg. 28)*

- *According to Gallup, Employees who strongly believe that they can link their goals to the organization are 3.5x more likely to be engaged. Only 44% of employees see this connection. ([Gallup: Re-engineering PM](), pg. 17, [Gallup: State of the American Workplace](), pg 80)*

- *Organizational goal setting (desired work/business outcomes, and plan to act towards them) improves performance ([Locke & Lantham]())*
- *Focusing on Best Self Management research, it is important to create clear, unambiguous objectives and key results to inspire and focus.*

- "On the Objectives Tab you can see all company-wide Objectives"

Navigate to the purple plus button to the left of a company-wide Objective > Click on the purple plus button so that the Objective expands

- "You can expand a company-wide Objective with the blue plus button to the left in order to see how both department and individual Objectives make an impact on the overall company-wide Objectives"

Navigate to the top right of the page

- "To create an Objective you will select the orange "Create a new Objective" button in the upper right-hand side"

Select "Create a new Objective"

- "Think of the Objective title as what do we want to accomplish?"
- "Then think of the Key Results as how will we measure success?"

SUGGESTIONS:

- State your expectations for your organization here
- If you prefer individual contributors make their Objectives with the support of their manager, make that clear here. If you want to

encourage employees to set their own self development Objectives each quarter make sure to state that here as well as what you expect to see in self development vs individual. For example taking a cooking class vs reading a book related to your career.

- Below you will find Example Objectives to use as you hold your training. If you already have a company-wide Objective for this quarter/ year, I would suggest using one of those

  O: Launch our SMB team development platform
  KR: Product design completed by January 15
  KR: 15 beta customer case studies by September 1
  KR: Sales deck, training materials, and all product assets by September 20

  O: Build a company culture where all employees belong, contribute, and thrive
  KR: Monthly employee happy hour activity, suggested by employees
  KR: Company Pulse Check score of 4 or higher in 15Five

  O: Generate team-wide commitment to our customer's success and delight
  KR: Net Promoter Score of 50 or better
  KR: Customer churn rate less than 2%
  KR: 50 new online customer reviews

  O: Increase customer education opportunities
  KR: Double the amount of webinars we are holding each month
  KR: Develop 20 new success center articles

Navigate to enter in the title of an Objective > Scroll your cursor around the pro tip to the right

- "There are pro tips to the right as you go through each step of creating an Objective"

Enter an Objective name

- "The first step you have is to enter in your Objectives title/name"

Select someone as the Objective owner - maybe yourself in the demo account (Seth)

- "Next you will enter the owner. There will always be an Objective owner"

Navigate to the Objective type section

- "You have a few options for entering what type of Objective this is; a person, a group, or the whole company"

Select "A person" to show individual vs. self development

- "If you do select a person, you can make this individual or self development"

Select "A group" > select department > select a department listed

- "If you select a group, you then have the option to select which group, is it a department or division? Then further down from there, which department or division?"

Navigate to the aligning Objective section

- "Aligning Objectives is optional, however, this will show you the view we just covered on how an individual Objective can be aligned to a department Objective, and from there a company-wide Objective."

- “You can filter Objectives under this section to align to. For example here you can filter Objectives to just those within your department so that you can align an individual Objective to your department-wide Objective for the quarter.”

Navigate to the Key Results Section

- “Enter in your Key Results. The pro tip suggests that these key results are quantifiable and you should have 3 - 4”

Navigate your cursor to the quantifying option (percentage, numerical, monetary)

- “You can quantify these by percentage of completion, numerical, or monetary amount.”

Navigate your cursor over the Kew Result Owner

- “You can assign key results to other colleagues if this is a collaborative Objective”

Navigate to the Objective start and end date

- “Then enter the start and end dates for your Objective. Keep in mind, if you are aligning to an Objective you will have to keep your dates within the same dates as the parent Objective”

Navigate to the last step for visibility

- “Lastly you have an area for privacy of this Objective. Public will be seen by everyone. The Check-in default permissions are that your answers will be visible to your manager, your manager's manager, and so forth. Specific people will always include your manager. It will also include anyone you assign a key result to”

Navigate to the “Create Objective” button at the bottom of the page

- “When you have filled out the Objective information, select “Create Objective”

Select the “Create Objective” button at the bottom of the page

- “You will be brought to an Objective Detail View for just that Objective.”
- “When you are in an Objective that is aligned to another Objective such as an individual that aligns to a company-wide Objective you will see that and can toggle to one another when you are looking at that Objective.”

Navigate to the Activity Feed in the bottom right-hand corner

- “You can see a history of activity on the Objective”

Navigate to the Gear Shift icon in the top right-hand corner

- “The gear shift icon is where you can edit, clone, or close the Objective”

Select Close Objective under the Gear Shift icon

- “Once you choose to close the Objective, for example you’ve completed the Objective and are at the end of the quarter, you will be prompted to reflect on your performance”

PAUSE - “Do you have any questions on Objectives?”

Reviews

Navigate to the Feature Tab > Select Best-Self Reviews

SCIENCE:

- *Research shows performance reviews, in general, can have a POSITIVE IMPACT on a wide range of organizational outcomes, such as task* *performance, productivity, organizational citizenship behavior, satisfaction and commitment.*

- *A FAIR PROCESS is widely regarded as a prerequisite for the effectiveness of performance appraisal. 95% of managers are dissatisfied with their performance management system*
- *Only 2 in 10 employees strongly agree that their performance is managed in a way that motivates them to do outstanding work.*
- *Only 14% of employees strongly agree that the performance reviews they receive inspire them to improve.*
- *29% of employees strongly agree that the performance reviews they receive are fair, and 26% strongly agree they are accurate.*
- *Gallup recommends that managers should complete at least 2 formal progress reviews per year — rather than 1 annual review.*

- "15Five firmly believes that individual high performance is a natural byproduct of someone being, and becoming, their best self. The Best-Self Review fills the gap between infrequent and ineffective annual employee reviews and tactical weekly check-ins by creating a cycle of reflection and intention setting."
- "Check-ins are used to facilitate bigger conversations about where you are heading in your career and what specific tasks or areas you want to be focusing on. The BSR is based on Self Reflection, and as a best practice, not used to gauge or fuel compensation conversations."
- "The BSR was developed as an opportunity to re-humanize work through the review process, and help people become their best selves through reviews"
- "We include a manager review because research shows the manager review/external sources of evaluation are more powerful than self

evaluation for improving performance, however, self assessment is key for perceived fairness and feeling heard."

- "We include a self review for fairness because research shows (CEBMA_Technical Assessment_REA Performance Appraisal.pdf) active participation has a large effect on perceived fairness and utility, as well as motivation to improve, specifically for the sake of having one's voice heard (sharing their feelings and ideas) rather than for the purpose of influencing the end result"

Navigate to the Feature tab > select Best-Self Reviews > select an active review cycle

- "In an active review cycle you will see the first tab overview the milestones."
- "If doing a 360 review with peer reviews, you will then see peer reviews"
- "Next you will see write reviews, then my results, and if a manager you will see team's results"

Navigate to the Peer Review tab

- "If you are in a 360 review with peer reviews, you will want to nominate your peers first from the peer review tab"
- "Employees are asked questions about their coworkers development - which increases performance, goal orientation, and growth mindset"
- "The following sections of a review and the questions might be different depending on how your organization has configured them"

Navigate to Write Review tab

- "On the Write Review tab you will have different sections on the left for the different reviews you have to fill out."
- "According to Gallup: People who use their strengths every day are 6x more likely to be engaged and 8% more productive."

- "In Alignment with Positive Psychology: knowing your highest strengths, and re-crafting all aspects of life to use them as frequently as possible, leads to engagement and flow, the psychological state that accompanies highly engaging activities"
- "Begin going through the questions and answering them. You will see a smiley face to the right of the text boxes if you would like to include emojis in your responses."

Navigate to the Growth & Development section

- "Your Groth & Development section will contain most of the free form text questions for you to fill out."
- "These questions are also forward looking and for your reflection. You will celebrate your wins and dig into the root causes which fosters learning, engagement, and psychological safety."
- "Employees who have conversations with their manager and aboutls and successes in the past 6 months are 2.8x more likely to be engaged."
- "When managers and team members review their wins and the root causes together, it elicits positive emotions, fosters bonding, and builds psychological safety for information sharing."
- "Future focused self development objectives and learning goals promotes a learning orientation which is the key to growth mindset."

Navigate to the Resources for your review blue link to the right

- "You will always see text to the top right for 'view resources for your review'. Clicking on this will pull you down to the bottom of the page where all of your wins & challenges flagged over time will populate, your OKRs in 15Five, weekly check-ins, past reviews, and High Fives. This will help you as you go through your self reflection.

- “These resources are included to reduce the recency bias often seen in review cycles
- “Remembering the things you accomplished and the things you want to work on”

Navigate to the Review Details to the top left under the Write Reviews

- “Under the review details you will see the type of review you are in, the transparency setting, and the milestones. The milestone will tell you when the specific review is due. The type of review and the milestone will change if you are switching between a self review, peer, upward, and manager.”
- “You will see who will be able to see the review answers. Yourself, your manager, and review admins or maybe yourself your manager and everyone up the reporting line, just like your check-in.“

Navigate down to the bottom of the review, but above the resources for review

- “Your answers will be saved if you choose to leave the review cycle and jump to another task.“
- “When you come back to your review it will save as a draft and all your previous answers will still be there.“

Navigate to the Company Values section

- “Moving on to the company values section, here you will reflect on how you’ve been living the company values since your last review and how you are aligning with company values.“

Navigate to the Competency Assessment

- “Next you have the competencies section. In order to create a more holistic, objective view of your performance over time we focus here on the 'how'. It blends in quantitative and qualitative data using flexible behaviorally anchored scales, so that performance isn't boiled down to a single number."

Navigate to the submit button

- "Once you have answered all of the questions, rated your contribution to company values, and reflected on your competencies the Submit button at the bottom will change from gray to orange."
- "Once you submit your self review, we'll send your answers to your manager for them to complete the manager review. You'll be able to edit your answers after you submit your review."

Navigate to the Manager Review section up at the top left > Select Leah one of Seth's direct reports

- "If you are a manager, you will be able to fill out the manager review once your employees have submitted their self reviews or once the due date for the self review has passed."
- "Starting at the very top you can begin to type in your answers. You will see a smile face to the right where you can add emojis throughout if you prefer. If you would like to see how your employee has reviewed themselves you can select the self tab to go and see what they have written. If you are in a 360 review cycle with peer feedback you could select that as well."
- "Only managers and review admins can see the Private Manager Assessment. The 5 questions in the Private Manager Assessment reduce the idiosyncratic rater bias where the ratings reveal more about the rater than the actual performance of the person being rated."

Navigate to the View resources for your review link to the right

- “You will always be able to ‘view resources for your review’ through the blue link to the right side of each section in your review. This brings you down to the very bottom of the page. Here you will see the wins & challenges that you have flagged from your direct reports Check-ins. You will see their Objectives, Past Check-ins, High Fives, and Past Reviews. You can change the time frame with the drop down to the right. It will default to “last month”.”

Navigate go to the company values section of the review

- “Moving on to the company values section. Here you will reflect on how this employee has been living the company values since their last review.”

Navigate to the competencies section of the review

- “Next you have the competencies section. In order to create a more holistic, objective view of your employee’s performance over time we focus here on the ‘how’. It blends in quantitative and qualitative data using flexible behaviorally anchored scales, so that performance isn’t boiled down to a single number.”

Navigate to the Submit & review next button in the review

- “Your review answers will save as a draft if you are unable to complete your review in one sitting. If you switch between tabs within 15Five or close your browser, the answers you have begun to type will be saved.”
- “Once you have answered all of the questions, rated your employee’s contribution to company values, reflected on their competencies, and filled out the private manager assessment the Submit & review next button at the bottom will change from gray to orange.”

Navigate to Leah’s review next in the top left side

- “When you have finished the manager review for one of your direct reports, you will see a gray check mark to the left of their name under the Manager Reviews listing all of your direct reports.”
- “The gray check mark indicates that you have moved to the summary page. All reviews have been completed and now it’s time to review the answers together. You will see the answers for each question, both how you have answered and how your employee responded. For questions that were asked to peers in the case of a 360 review cycle, you will see how the peers have responded as well.”
- “You can then summarize these answers. Use this during the 1-on-1 discussion to align on strengths, celebrate wins, and discuss future self development growth.”

Navigate to the bottom to show the ‘Share & finalize’ results button

- “You can click ‘Share review’ to give Brandon access to all answers from their reviews. Notes, summaries, and the private manager assessment will remain editable.”
- “Or you could click ‘Share and finalize results’ to share all answers, notes, summaries, and finalize the review. This action can’t be undone.”
- “If you selected the Share & Finalize, then the gray check-mark will turn green as there are no further actions required for this employee’s review.”

Navigate to My results tab

- “After all your reviews have been submitted and your manager shares or finalizes their review, this page will display all results from the review cycle including competency assessments, answers, and more.”
- “You are also able to download these results in CSV or XLSX format.”

Navigate to Team’s results tab, in the demo it is Company's results since Seth is a Review Administrator

- “If you are a manager, you will see the Team’s results tab. Starting off on the right hand corner you have the ability to download these results in either CSV or XLSX format.”
- “Below the download button you can select either By Participant view to see the Team’s competency assessment results or you could select By question to see all the questions that have been answered within that review cycle.”

Navigate to the drop down menu for viewing the results by people

- “You can filter the results page by people with the drop down menu.”

Navigate to the Participant stats section on the left

- “To the left you have your participant status, this will show you if people are still submitting reviews, you will also see a banner at the top stating ‘Not all reviews have been submitted’ if that is the case.”

Navigate to the Review stats

- “Under Participant status you will see the review stats, then you will see results collected from the private manager assessment.”
    - “The percentage of employees that are ready for a promotion is calculated on the individual level. It means either 100% yes or 0% no. This is calculated by the average of managers’ responses to the default 15Five question.”
    - “The percentage of employees that are at performance risk is calculated on the individual level as well. 100% would be at risk and 0% would be not a risk.”

Navigate to the Company competency assessment results

- “In the center you will see the Team’s Competency assessment results if you had included the competency section within your review question templates. This will allow you to visually understand the results of the competency assessment and identify any perception gaps among different perspectives.”

Navigate to the Distribution button under Company competency assessment results

- “You have the ability to switch from radial to distribution so that you can see the assessment in a different format. With the radial distribution, you can toggle on or off specific review types; self, peer, or manager.”
- “Below you will see the strongest competencies by the type of review; self, peer, or manager.”

Navigate down to Participants

- “Scrolling down you will find the Participants section. Here you can see review progress or go into view details. By selecting view details, you will be brought to that employee’s review summary.”

Navigate to the top of the page > select by question

- “Moving into the By question section of the results tab, here you can select the drop down menu to only show one specific review section or all.
- “You can search for a specific question in the search box to the right hand side or you can scroll through all for the questions.”

Navigate to select the number of answers to the right of a question or the ellipses > then view all answers

- “To the right of the questions, you can select the ellipses to view all of the answers to that question, download the answers in CSV, or download in XLSX format.”
- “By selecting the number of answers or the ellipses and viewing all answers, you will see how each employee has answered that question. In addition to the answers you will see if the review was a self, manager, or peer review above each answer.”
- “The answers are ordered by employee name and therefore you will see how either their peer, manager, or self has answered.”

PAUSE - “Are there any questions on Best-Self Reviews?”

Engagement+

Navigate to the Features Tab > Select Engagement+ > Select Surveys

SCIENCE:

- *The Engagement plus feature is different from others. We believe that those who find work consistently energizing, inspiring, and meaningful by leveraging their strengths, values, and passions. We are measuring what matters - engagement and thriving - to increase performance.*

- “You will receive an email letting you know that a survey has been started”
- “From that email, you can click the orange 'Start your survey' button to go right into the survey or if you are in 15Five, navigate to Engagement+”

Select the Survey under Active Survey

- “Similarly to review cycles, select the survey under the Active survey section”
- “Here you will go thought the questions being asked and answer them”

Scroll down to the “Submit” button

- “Once you have finished answering your questions press the “Submit” button at the bottom right of the page”
- “Just like your Check-in your answers will be saved as a draft”
- “Managers and Admins will not receive notifications when you submit your survey because answers are anonymized”

Select the back button at the top “< Surveys” to go back to the list of Surveys

Hover over the Completed surveys section

- “Once you have completed a survey, you will see that under Engagement+ Completed surveys. You cannot go back to edit your answers once they have been submitted, but you can see what you did answer”

Pause for questions

Check-in Part 2: Manager Engaging with submitted Check-in

Navigate to the Check-in > Select Team’s Check-in

SCIENCE:

- *Companies can effectively drive employee engagement and performance through one step: recurring and impactful conversations. The Check-in is our two step process for high impact 1-on-1s that move beyond status updates to maximize the quality of conversations between managers and their team members. Therefore, as managers it is very important for you to be engaging with your team's Check-ins check-ins. This includes simply liking, commenting and reviewing reports.*

- *Best self management is about facilitating psychological safety. Through the Check-in you can help your employees feel respected and accepted by allowing them to talk about what's going well and what challenges they are having. Then as manager you can come alongside to engage, give feedback, and assist them in their needs.*
- *A Gallup study found that when managers provide frequent feedback employees are 3.6 times more motivated, three times more engaged, and employee productivity increased 1.6 times.*
- *This weekly check-in is a weekly work journal designed to help your team stay aligned, focused, and accountable. In each Check-in, your employees will share how they felt at work that week, their top priorities for the coming week, recent wins and challenges they've had, High Fives for peer recognition.*

Select the week listed to the left that has an orange dot on it

- "Here under the Team Check-ins Sub-Tab you can see the orange dot that reflects a Check-in that has not been reviewed."
- "From this view you can also see into your direct reports' directs. You can do this by selecting the blue plus icon to the left of your direct reports. Again, this is just for the Check-in."

Navigate to Leah's Check-in - there should be an orange dot to the left of the submit date

- "Reflecting back on what we just covered and how you could engage with your own Check-in after you submitted it by commenting, adding items to your 1-on-1 agenda, flagging something as a win or challenge, there are very similar integrations here as you engage with your direct reports"

Navigate your cursor around the emoji icon (smiley face)

- “There are two new items here for managers when engaging with a submitted Check-in of their direct report. These two new items are liking and passing items up.”

Navigate to the Pulse question

- “The Pulse helps you understand how your team is feeling. This ongoing pulse of your team’s feelings helps you to be the first to know when something isn’t right.”
- “We recommend commenting on responses to help your employees feel more heard. Plus, it’s a great way to dig deeper”
- “Some examples are ‘Is there anything I can do to help?’ or ‘Let’s talk about this in our next 1-on-1’.”

Navigate to the Objective section of the Check-in

- “Look for the disconnect between the color of the objective status, (green = on track, orange = behind, and red = at risk) and attainment or percentage of completion of the objectives here.”
- “Just because the objective was checked as on track does not mean that there is a lot of progress being made.”

Navigate to the Priorities section of the Check-in

- “Find out what your team is focused on.”
- “Every week, your team will reflect on their latest accomplishments and set new priorities for the coming week. This practice helps employees stay focused and keeps managers in the know."
- “Increase collaboration or reduce duplication in work by tagging in others using @ mention to bring a team member into the conversation”

- “I would suggest adding a Priority or a Question to the 1-on-1 agenda. I like to add the question “What challenges are you facing? Where are you stuck?” for further discussion with my direct reports”

Navigate to the Questions section of the Check-in

- “Ask questions to learn what’s going well and what’s not.”
- “Asking questions leads to more effective feedback loops. You can pull an additional question from our Question Bank, but we recommend keeping questions on wins and challenges week over week to increase reflection.”

Navigate your cursor to the ellipses to the right of the question one what challenges you have been facing > select “Pass it up”

- “Pass it up can be used if you want to rope your manager in for conversation around a new great idea or something you need to collaborate with them on”
- “Flag something as a Wins & Challenges. You can flag these so that it’s easy to reflect on your employees work when you are in a review cycle”

Navigate to the High Five section of the Check-in

- “Reading High Fives will help in understanding the impact you individual team members are making on the organization. High Fives aren’t just morale boost - they show what’s going on at ground floor”
- “From within your direct report’s Check-in, you can give them a High Five and see how others are thanking them too.”

Navigate to the “Help ‘name’ grow” section (very bottom of the page)

- “People crave feedback, so be proactive and not just reactive. You can give proactive feedback in the Help ‘name’ grow section at the bottom of their submitted Check-in.”

- “We suggest at a minimum managers like and comment 3 - 5 different areas of the Check-in their direct report submitted”
- “We encourage you to review the submitted Check-in within 48 business hours. Maybe even put an invite on your calendar for “Review Check-ins”

Navigate to the button “Mark as reviewed”

- “Remember to click “Mark as reviewed” at the bottom of the page. This lets your reporter know that you've actually reviewed their Check-in for the week.”

Other ways to interact with a submitted Check-in

- “You can add comments with the chat bubble icon to the right of each section”
- “You can @mention someone within a comment”
- “If you choose to flag something for Follow up, it will only show on your to do list within 15Five under your Home page or under Check-ins in the sub-section follow-ups”
- “Lastly you have the option to share an item within the Check-in via email”

PAUSE - “What questions do you have?”

Reporting

Navigate to the Reporting tab > select Check-ins > select Dashboard

- “Now that we have collected feedback and insights from our employees, it’s time to take action! This area is great for managers to pull information on themes across teams. You can also engage directly with your employees from your reports to gather more feedback or take action."

- "For the reporting tab, you can always break the data down by groups in 15Five as well as time. In addition, you can export this information in png or csv format."
- "The visibility here is the same as the Check-in. You can see down your reporting structure."
- "The Check-in Dashboard by default will show activity for the last month. At the top you have the company average pulse score."

Navigate to the bottom of the page to see the submitted Check-in widget

- "Scrolling down, you will see the percentage of submitted Check-ins on the left."
- "To the right, you will see the percentage of those submitted Check-ins being reviewed. Here you can see the comment and like rates of managers to ensure they are engaging with their direct reports. "

Navigate to the left side navigation select Reporting > select Check-ins > select Pulse

- "Here you can see a graph of the average pulse through the company or team."
- "As you scroll down, managers will see their group average or direct report average. Use this as an early warning indicator of dips in morale. As a manager it gives you the opportunity to step in if score dips. "

Navigate to left side navigation select Reporting > select Check-ins > select Submitted Check-ins

- "This section will show you each employee, their reviewer, submission rate, and further detail around their usage."

Navigate to left side navigation select Reporting > select Check-ins > select Reviewed Check-ins

- "This will show you each manager, their number of direct reports, their review rate and further detail around their usage."

Navigate to left side navigation select Reporting > select Check-ins > select Questions

- "If you created a question or simply set one up from the question bank, try running a report on that question to see how the answers might have bubble up themes."

Navigate to the blue text 'See answers to questions' at the bottom of the first widget

- "Here you can select 'See answers to questions' at the bottom of the first widget to get a more granular view of the answers."
- "Once you select this button, you will see questions to choose from."
- "Once you pick a question to the right by selecting 'view answers' you can engage with the responses just like you would in reviewing a Check-in by selecting the ellipses to the right of the answer. You can also like or comment with the icons below the question to the left."

Navigate to the left side navigation select Reporting > select 1-on-1s Dashboard

- "1-on-1s within Reporting allows you to see the usage of the 1-on-1 feature."
- "Here you can see the percentages of 1-on-1s that are happening, what the percentage is of 1-on-1s between managers and direct reports, and what percentage of 1-on-1s going on are between someone other than the employee's reviewer."

- “If you select the text ‘see full report’ at the bottom of the widget you will be able to see further detail like average talking points, % of talking points completed, average action items per person, and % of action items completed.”

Navigate to the left side navigation select Reporting > select Objectives > select Dashboard

- “With the Objectives Dashboard you can see graphs for the Objective status, Objective and Key Result ownership, and Objectives alignment.”
- “The Objective Status section will pull you to the Objectives feature and show you all Objectives of all time with a summary of what is on track, behind, or at risk.”
- “The Ownership section will pull you to the Objectives feature and filter all the Objectives to show you just those that are current. You will also see the amount of Objectives per person and how many key results there are per person.”
- “The Alignment section will pull you to the Objectives feature and filter all the Objectives to show just those that are aligned to one another. At the top you will see a summary of what is on track, behind or at risk.”

Navigate to the left side navigation select Reporting > select Custom reports

- “The Custom Reports Tab is great for managers to pull information on themes across their teams. For example, we can pull answers to the question in the Check-in asking “What challenges are you facing?” for all of your direct reports”
- “To do this we are going to go to Custom reports > select Questions > select Everyone you have permissions to view > select the last month > select the question “what challenges are you facing” > the last section for including comments allows you to like or comment in this custom report.”

- “Once you’ve pulled the report you can print and download it as well”

Home

SCIENCE:

- *Unlocking the potential of your workforce starts here - with an employee-centric profile section where people can clarify their role description, keep track of their top priorities, view their trends and accomplishments over time, and uncover their top strengths to envision their ideal role.*
- *‘My Profile is a home base and the hub for all personal activity in 15Five to help employees develop into their best selves. Here, employees not only see how they’ve grown over time, but they also envision their ideal selves - and work with their managers to turn their dream career into reality.*

Navigate to the Home Tab > Start on the Highlights Tab

- “The Highlights tab is a consolidated view of all 15Five “To do’s”. This section includes when your next Check-in is due, current Objectives, recent High Fives, and any Check-ins from your team that are ready to be reviewed.”

Navigate to the About Tab

- “The About section consists of all questions/details that your account admins, reviewers, and teammates would like to know about you, so answer honestly.”
- “Your ‘About’ page is visible to everyone in the company. Account admins control what prompts appear in this tab. Therefore, information on the ‘About’ page can change over time, depending on what your account admins want to know about you.”

- “Also included on the ‘About’ page is your team and/or group membership, if applicable.”

Navigate to the Career Vision Tab, stay on the Job Description section

Science:

- *According to a Gallup study, only 50% of employees know what is expected of them at work. There is a Lack of Role Clarity.*
- *Role Clarity cultivates psychological safety, (the degree to which employees feel comfortable taking interpersonal risk). When people know what’s expected of them at work, they feel more confident to speak up.*
- *According to Best-Self Management research, aligning with your manager on your job description helps productivity by creating clear roles and expectations. Using detailed job descriptions helps team members know what's most important for their role and where their roles intersect and overlap with others.*

- “The Career Vision page will house your job title and description, as well as your top strengths. Let your team know what you’re focusing on and what you’re great at.”

Navigate to the Strengths section of the Career Vision tab

Science:

- *According to a Gallup study, people who use their strengths every day are 6x more likely to be engaged and 8% more productive.*
- *Knowing your highest strengths and recrafting all aspects of your life (from work to parenting) to use them as frequently as possible leads to engagement, flow, and long-term happiness.*

    - *Flow is the psychological state that accompanies highly engaged activities.*

- "Our goal is to help you identify strengths and clearly align your day-today activities with what you do best to drive company initiatives forward."

Navigate to the Aspirational Job Title & Description section of the Career Vision tab

Science:

- *In a Gallup study, the opportunity to learn and grow is the number one factor millennials look for when applying for a job. Continual growth and development leads to stronger engagement and better performance.*
- *Aspirational job titles fosters psychological safety and reduces burnout.*

- You can set aspirational career goals with your manager here. The aspirational part is private to the two of you.

Navigate to the Activity Tab

- "The Activity section is all about you! View your essential stats and activities like Pulse trends, Objectives, contribution to questions, your 1-on-1 history, and High Fives."

Navigate to the Wins & Challenges Tab

- "The Wins & Challenges section allows you to collect the most important insights from your Check-ins. You can look back on this information when writing your Best-self Reviews. This section is only visible to you."
- "You can also add notes within here."

Settings

Navigate to the My Settings Page > Upper right-hand side > drop down menu

Navigate to the Vacations Tab

- "Starting with the last tab here for Vacations - Here you can enter in time off. There are two reasons why you will want to put your vacations in 15Five"
    - 1. "So that you do not receive reminder emails that their Check-in is due or past due while you are out of office"
    - 2. "So that you are accounted for and no negative data would show for you not submitting your Check-in that week"

Navigate to the Notifications Tab

- "You can set your notification preferences here"
- "If you have our Slack integration enabled you will see a second column next to the email collem to toggle on Slack notifications."
- "There will always be a chat bubble at the bottom right of the screen. That chat goes directly to the 15Five support team. If you have any questions, feel free to chat in-app to them!"

Navigate to the Help Center, Select the gear icon in the upper right-hand corner, then scroll down and select Help Center

- "Here you can find a variety of resources on specific features or simply getting started."
- If you have any questions please reach out!
- **SUGGESTION**: "You can reach out via the 15Five Slack channel set up at our organization or email our 15Five Admin JANE DOE"

Bring back up the powerpoint slide and show a slide of action items

1. The first Check-in due date

2. Help Center information
3. Call out Support for technical escalations/issues, both internal and 15Five support

Ask the audience

1. “What one thing did you take away from today's training?”
2. “What one thing are you most excited about?”
3. “What one thing do you find valuable about 15Five?”

Open it up for questions

Kahoot Quiz (Optional)

Bring up the Kahoot account and ask everyone to take out their phone to take a quick quiz

1. Everyone will go the the kahoot account and enter in the game code
2. Then they would enter in their name
3. You will have a powerpoint within Kahoot to drive the quiz and share answers along the way