
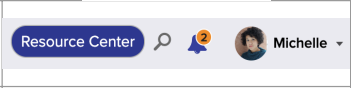


Betterworks Guides Templates

Guide Name	Guide Description	Activation	Target Element/Badge Location	Badge Preview
1. Betterworks Guides 1:1 Meetings: Module Overview	Lightbox announcement to introduce employees to the Betterworks 1:1 Module, providing a video-walkthrough of best practices and support resources.	Target Element	Navigation Bar: 1:1 Meetings	-
2. Betterworks Guides Admin: HR Admin Resources	Lightbox announcement to introduce HR Admin to the Betterworks Admin module with relevant support resources.	Target Element	Navigation Bar: Admin	-
3. Betterworks Guides Calibration: Adding Managers as Reviewers	Tool-tip to provide Super and HR Admin with instructions on adding Managers as Reviewers to a Calibration Session.	Tooltip Badge	Session Creation: Add Reviewers	
4. Betterworks Guides Calibration: Creating a Session	Multi-step walkthrough for Super and HR Admin with detailed instructions for creating a Calibration Session.	Automatically, Tooltip Badge	Session Creation: Create	
5. Betterworks Guides Calibration: Module Overview	Lightbox announcement to introduce employees to the Calibration Module within Betterworks.	Text Badge	Calibration Home: Cycle Header	
6. Betterworks Guides Calibration: Session Overview for Managers	Lightbox for Managers added with Calibration Reviewer access, providing a video resource and downloadable support guide on navigating sessions.	Automatically, Text Badge	Calibration Session: Session Header	
7. Betterworks Guides Conversations: Adding Contributors	Tool-tip to provide support resources on adding contributors to conversations with contributor capabilities enabled.	Tooltip Badge	Conversation List: Contributor Column	
8. Betterworks Guides Conversations: Creating an Anytime Conversation	Multi-step walkthrough with instructions for employees on initiating an Anytime Conversation within the Conversation Module	Target Element	Conversation List: "Create" Button	-
9. Betterworks Guides Conversations: Module Walkthrough	Multi-step walkthrough to provide employees with an overview of the Conversations Module, including instructions on completing active and viewing completed conversations.	Target Element, Resource Center	Navigation Bar: Conversations	-
10. Betterworks Guides Conversations: Resources for Participants	Tool-tip to provide managers and/or direct reports with guidance on completing conversations. <i>Note: The ability to segment guides allows you to provide guidance and resources that are relevant to a specific conversation or employee group.</i>	Text Badge	Conversation Detail: Title	
11. Betterworks Guides Feedback: Module Walkthrough	Multi-step walkthrough to provide employees with instructions on how to request, give, and view Feedback within Betterworks.	Target Element, Resource Center	Navigation Bar: Feedback	-
12. Betterworks Guides Feedback: Summary Tab Overview	Tool-tip to provide employees with access to Feedback Summary with instructions on viewing current and/or past Scheduled Feedback responses.	Tooltip Badge	Feedback Navigation Bar: Summary Tab	
13. Betterworks Guides Goals: Alignment	Tool-tip to provide employees with instructions on how to align a goal.	Tooltip Badge	Create and Edit Goal: Alignment Header	
14. Betterworks Guides Goals: Goal Creation Walkthrough	Lightbox announcement to introduce employees to the goals module with verbiage on the importance of setting ambitious and meaningful goals. Following the introduction, a multi-step walkthrough provides step-by-step instructions on how to create a goal and additional resources to aid in goal setting.	Target Element, Resource Center	Navigation Bar: Goals	-
15. Betterworks Guides Goals: Using Filters	Tool-tip to provide employees with detailed instructions on filtering Goals, including recommended filters and steps to save a filter view.	Badge	Goals List: Filter Menu	
16. Betterworks Guides HR Insights: Module Overview	Tool-tip to provide Super and HR Admin with an instructional video and downloadable guide on the data available within the HR Insights Module.	Automatically, Tooltip Badge	Insights Navigation Bar: HR Insights Tab	

17. Betterworks Guides Platform Walkthrough	Multi-step walkthrough to provide employees with modules available to them within Betterworks, including Goals, Conversations, Feedback, Recognition, in addition to Profile Settings. Note that any steps for modules not being utilized by your organization can be removed individually.	Resource Center	Launched from Resource Center	-
18. Betterworks Guides Recognition: Module Overview	Tool-tip to provide employees with guidance on providing recognition in Betterworks	Tooltip Badge	Give Recognition Button	
19. Betterworks Guides Resource Center	Tool-tip to provide employees with quick access to important program resources. Buttons within the Resource Center can launch in-app guide tutorials or link out to your external resources and helpful user content.	Text Badge	Navigation Bar	
20. Betterworks Guides Welcome Guide	Lightbox announcement to welcome first-time users to Betterworks and provide announcements regarding your performance program. <i>Sample verbiage is provided within the guide to be customized by your organization</i> —many organizations customize this further by including their own welcome video message from their CEO or People team.	Automatically	-	-