

NextGen Upgrade Communication Templates

Sample email templates for your NextGen upgrade.

Please be sure to update and customize for your program timeline, and specific features and benefits.

The template features a 2x2 grid of performance levels: 1 Develop to Excel (red), 2 Solid and Steady (yellow), 3 High Performing Pro (orange), and 4 Leading Edge (green). Below the grid is a table with columns for EMPLOYEES (1237), MANAGER, PERFORMANCE RATING FROM MANAGER, and POTENTIAL RATING. Two rows of employee data are shown with placeholder icons and bars.

DESCRIPTION ^
This template should be used at least 1 time per month to provide development and coaching to employees.

✓ Your conversation is complete

You | Damon

Damon can see your answers.

1. What do you find the most difficult in performing your job?

2. Why is it difficult?

3. What contributes to your enjoyment while at work?

Previous Conversation

- Stretch Assignment Planning May 31st
- Career Development Conversation April 30th
- Quarterly Performance Check November 22nd
- Return From Leave Onboarding October 7th
- Annual Review September 1st

This is a duplicate of the performance matrix template shown above, featuring the same 2x2 grid and table structure.

Email 1: Announcement

Betterworks Upgrade is Coming Soon

Subject: Upcoming Upgraded to our Betterworks Platform

Hi everyone,

We're excited to share that we are preparing to upgrade our Betterworks platform to a new user experience. The new interface is designed to make it easier for all of us to focus on what matters most: meaningful performance conversations, clarity on goals, and alignment on progress.

The upgrade will follow a phased approach to ensure a smooth transition:

1. Test environment upgrade: Our internal team will review workflows and validate content.
2. Production upgrade: Once testing is complete, we'll move our working environment to the new interface.

Over the next several weeks, we'll share details about timing, what's changing, new and exciting features, updated enablement materials, and what you can expect during the transition.

This upgrade does not change our performance program, cycles, or expectations, it simply gives us a more intuitive experience with new features to help improve how we work.

Stay on the lookout for more information coming soon.

Thank you!

[Signature]

Email 2: Understanding

What's Changing in Betterworks

Subject: What to Expect in our Upgraded Betterworks Platform

Hi everyone,

As part of our upcoming Betterworks upgrade, we want to share a preview of what's changing and what's staying the same.

What's Changing

- A simpler, more modern design
- Clearer navigation
- Streamlined workflows for goals, conversations, meetings, and feedback
- Enhanced AI tools
- New and more intuitive dashboards

What's Staying the Same

- Our performance program and process
- Current cycles, templates and expectations
- All existing goals, conversations, and historical data

This transition is focused on improving engagement, usability and reducing friction, not changing the fundamentals of how we work.

Once we complete testing, we will share updated materials, screenshots, and timelines of what to expect and when.

Thank you!

[Signature]

Email 3: Readiness

Manager Focused Communication (To be sent 1 – 2 weeks before upgrade)

Subject: What Managers Need to Know Before our Betterworks Upgrade

Hi Managers,

As we prepare to upgrade our Betterworks platform, here's what will be most important for you and your teams.

Why this upgrade matters

- Manager dashboard visibility
- Easier preparation for check-ins and meetings
- Improve AI workflows
- Talent profiles

What you can expect

You will receive:

- A Manager Quick Start Guide
- Updated enablement content
- New platform walkthrough instructions
- Recommended talking points for your team
- Live or recorded training sessions

Please take a few minutes to review the guides once they're shared. Your support will help your teams understand what's changing and feel prepared for the new experience.

Thank you for leading through this transition.

[Signature]

Email 4: Activation

Upgrade Day (To be sent company-wide)

Subject: Our Upgraded Betterworks Platform is now Live

Hi everyone,

We're excited to share that our Betterworks platform has now been upgraded to the new user experience.

Here's what to expect today:

- You'll see a brand new design and simpler navigation
- All of your goals, conversations, and data remain unchanged
- Updated walkthrough guides and Quick Start materials are available
- If you run into anything unexpected, support is available

Where to Begin

- Review your Employee or Manager Quick Start Guide
- Explore the new layout to get familiar with the changes
- Make updates to your goals
- Review your upcoming meetings
- Give feedback and recognition to your colleagues
- Review your new Homepage Dashboard for upcoming To Dos

If you need any help, please refer to your Quick Start Guide or reach out to your manager to our support team at support@company.com.

Thank you!

[Signature]

Email 5: Reinforcement

Manager Tips (To be sent post upgrade)

Subject: Tips for Supporting Your Team in Betterworks

Hi Managers,

As your teams adjust to the new interface, here are a few ways you can support them this week:

- Encourage employees to check in on their goals
- Make sure your meetings with each employee are set up and connect to your Google/Outlook calendars
- Use your new dashboard to understand where follow-up may be needed
- Reinforce regular discussions using our anytime conversation templates and/or agendas in the meetings module
- Share feedback and recognition where it's helpful

Please continue encouraging your teams to use the platform regularly, it helps build confidence and consistency.

Thank you,

[Signature]

Email 6: Reinforcement

Feature Highlights (To be sent to all post upgrade)

Subject: Helpful Features to Try

Hi everyone,

Here are a few features in our new Betterworks platform you may not have discovered yet:

- Saving new Goals filters for quick access
- Utilizing the new Meetings AI summary
- Viewing your own AI Talent summary

Give these a try this week, they're designed to save you time and provide you with a stronger performance narrative.

Happy playing,

[Signature]