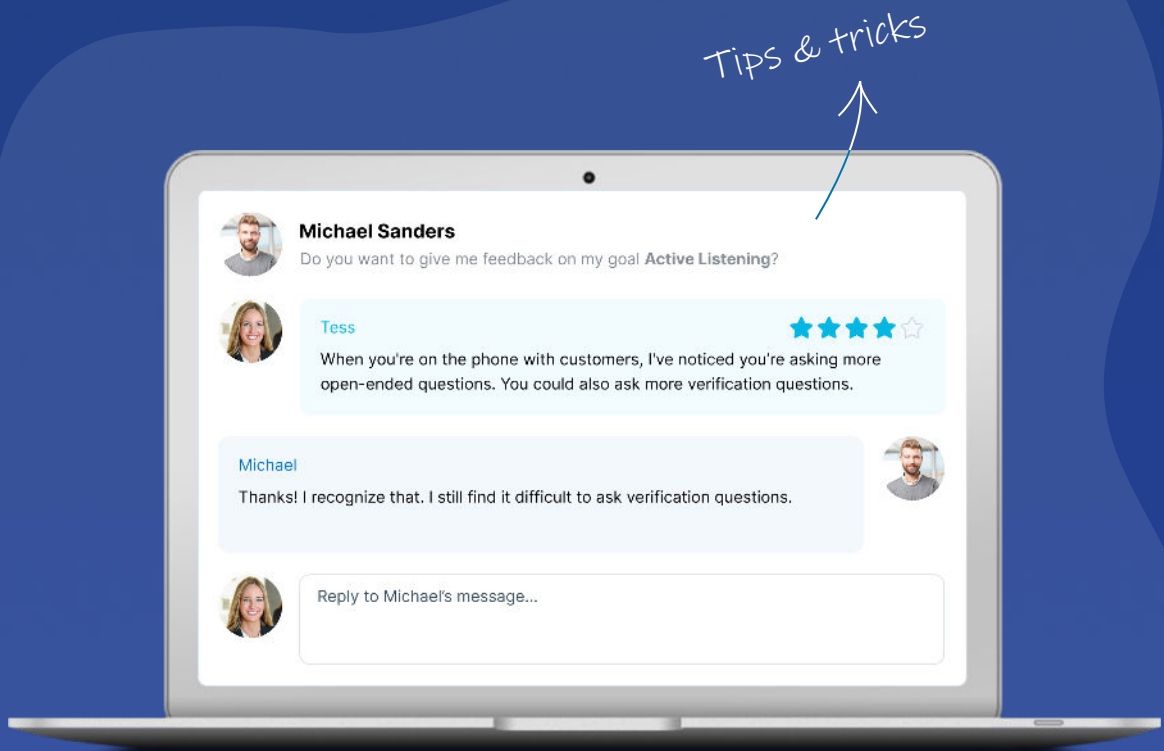


# D Dialog



## Getting started

Discover the possibilities  
of our online platform

# Introduction

Determining and achieving what you want to accomplish and develop is important in every organization. We are happy to help you with that!

In this guide you will discover the most important functionalities of our online platform. We will take you through a couple of easy steps to get you started.

Have fun and good luck!

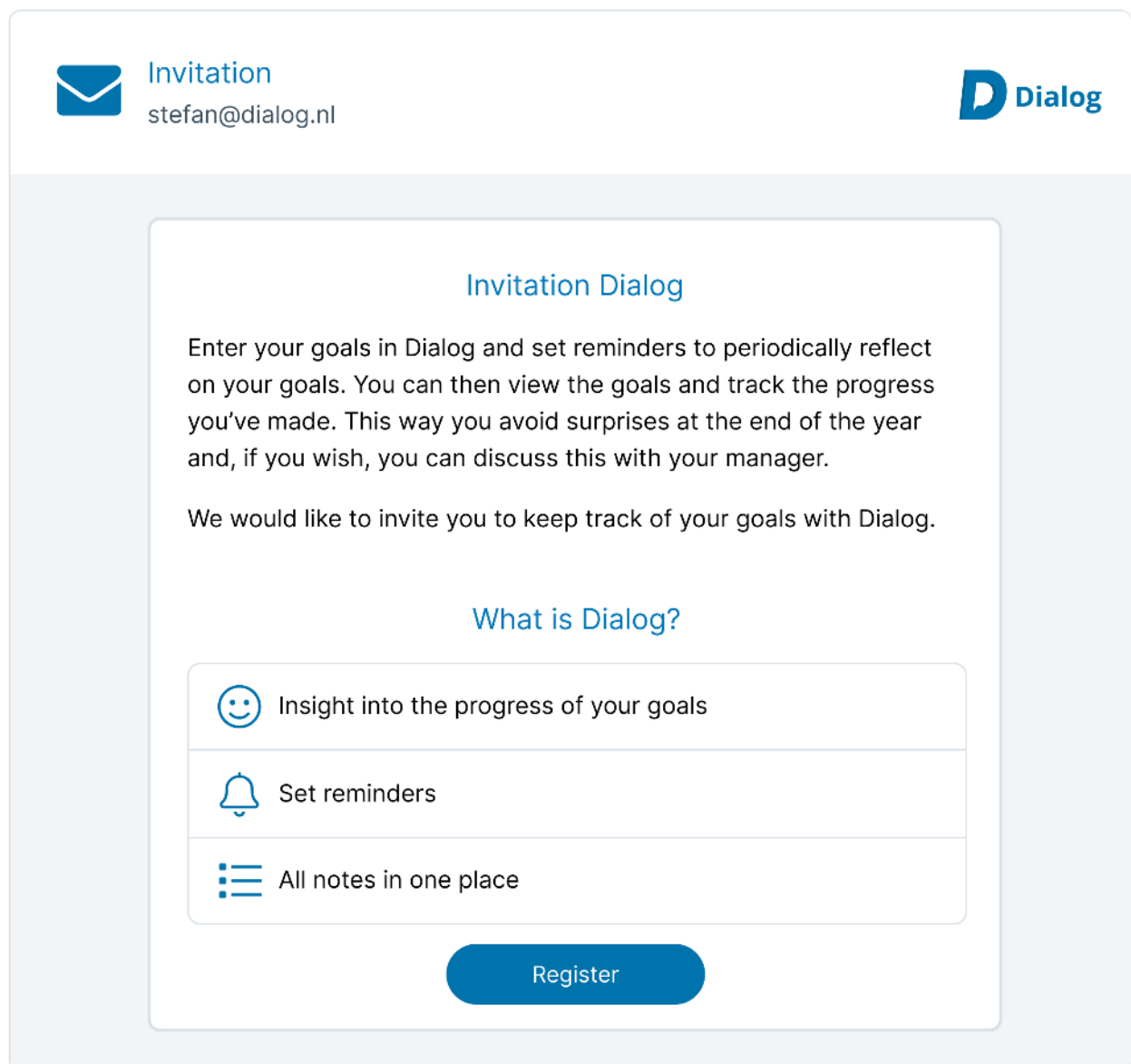
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# 1. Registration

You have received an invitation email or SMS to register for the online platform. Click the button in the invitation to go to the registration screen. Haven't received anything? Then ask your manager for your unique code and go to [app.dialog.nl/account/register](https://app.dialog.nl/account/register).

✓ Click the button to register your account!



One of these two options applies to your organization:

- 1 Create a new account (with e-mail or phonenumber)
- 2 Log in directly with your company account (Single Sign-On)

**Note:** With SSO you will go directly to the login screen.

✓ Click the button to register your account!

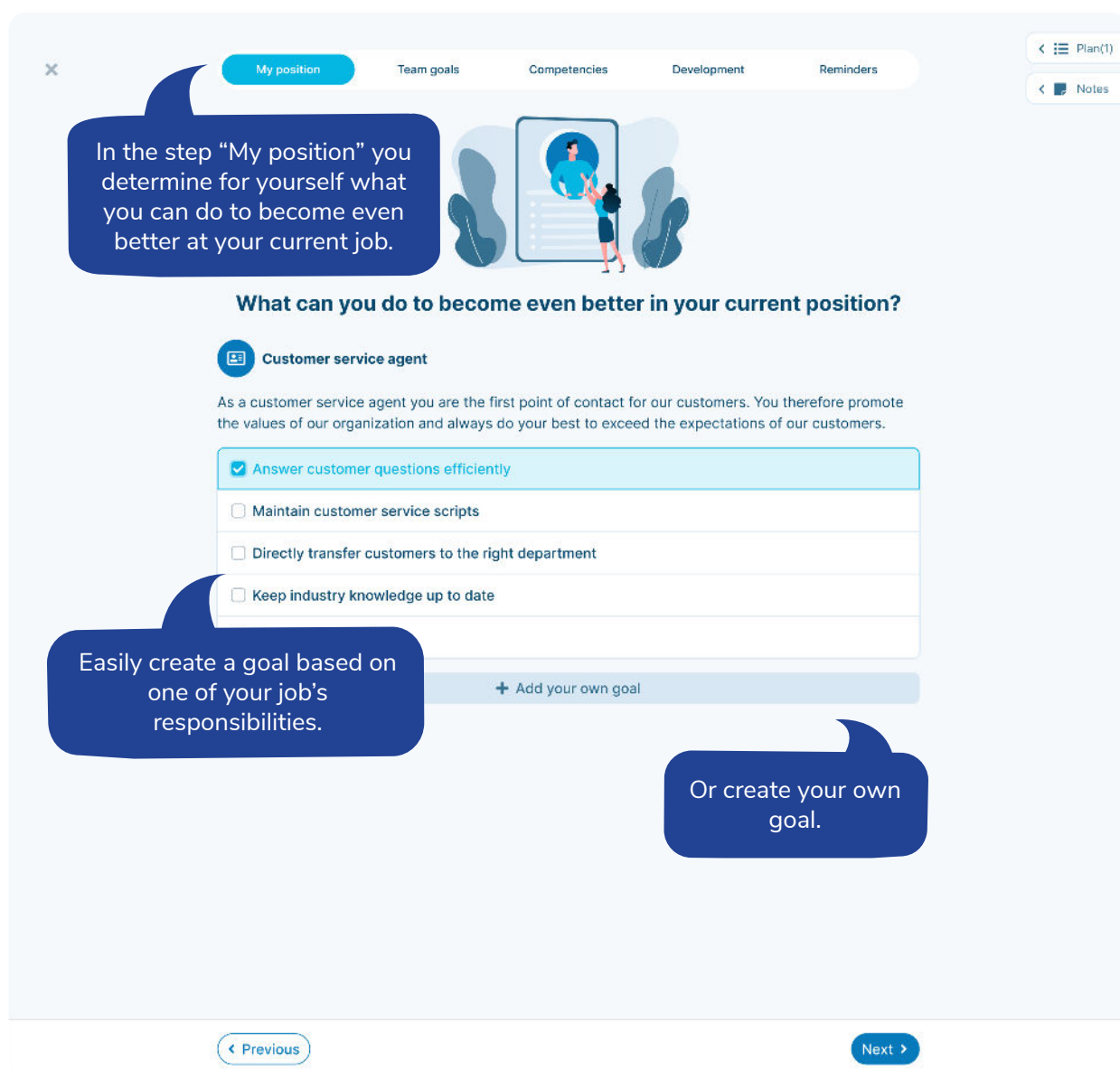
The screenshot shows the Dialog registration interface. At the top is the Dialog logo. Below it, the title 'Register' is centered. To the left of the registration form is a callout bubble that says: 'Upload a photo to make sure you are recognizable to colleagues in the platform.' The form itself has a header area with a placeholder for a profile picture and a link 'Already have an account? [Login here](#)'. The form fields are: 'Unique code' (a single text box), 'Name' (split into 'First name...' and 'Surname...' text boxes), 'E-mail' (a single text box), 'Mobile phonenumber' (a single text box), and 'Password' (a single text box with a lock icon). To the right of the password field is a callout bubble that says: 'Create a secure password (min. 8 characters)'. Below the fields is a checkbox with the text 'I consent to the use of my personal data in order to improve this platform's services.' At the bottom of the form is a blue 'Register' button. Below the button, there is a link: 'You can read our [privacy declaration](#) and [cookie policy](#) here'.

## 2. Create a personal plan

Focus is crucial while achieving goals. In the online platform you therefore record what you want to achieve (performance goals) and develop (development goals) in the upcoming period.

To get you started, you can create goals related to your position.

✓ Create your first goal now



The screenshot shows the 'My position' step in the online platform. The interface includes a navigation bar with tabs: 'My position', 'Team goals', 'Competencies', 'Development', and 'Reminders'. A 'Plan(1)' button is visible in the top right corner. A 'Notes' button is also present. The main content area is titled 'What can you do to become even better in your current position?'. Below this, there is a section for 'Customer service agent' with a description: 'As a customer service agent you are the first point of contact for our customers. You therefore promote the values of our organization and always do your best to exceed the expectations of our customers.' A list of responsibilities is shown, with the first one, 'Answer customer questions efficiently', selected. Below the list, there is a button to 'Add your own goal'. The interface also includes a 'Previous' button and a 'Next' button at the bottom.

In the step "My position" you determine for yourself what you can do to become even better at your current job.

**What can you do to become even better in your current position?**

**Customer service agent**

As a customer service agent you are the first point of contact for our customers. You therefore promote the values of our organization and always do your best to exceed the expectations of our customers.

- ☒ Answer customer questions efficiently
- ☐ Maintain customer service scripts
- ☐ Directly transfer customers to the right department
- ☐ Keep industry knowledge up to date

+ Add your own goal

Easily create a goal based on one of your job's responsibilities.

Or create your own goal.

< Previous

Next >

Afterwards you will be able to create goals that directly contribute to a team or organizational goal.

## ✓ Add a goal that makes your contribution visible

The screenshot shows the 'Team goals' interface in the Dialog platform. At the top, there are tabs for 'My position', 'Team goals' (active), 'Competencies', 'Development', and 'Reminders'. A 'Support' icon is also visible. Below the tabs, there's a large blue target icon with the text 'To what can you contribute?'. A callout bubble explains that in the 'Team goals' step, users determine their contribution to team or organizational goals. Below this, there's a list of goals: 'Improve customer satisfaction' and 'Optimise processes'. A 'New performance goal' modal is open, showing fields for 'Name goal', 'Describe what you want to achieve (optional)', and 'Which steps are you going to take? (optional)'. A callout bubble advises keeping the goal name short for readability. Another callout bubble points to the 'Describe what you want to achieve' field, suggesting breaking down the goal into actions or measurable results. On the right side of the modal, there's a section titled 'Team goals' with a list of goals: 'I will contribute to a team or organization goal (optional)', 'Improve customer satisfaction' (selected), 'Optimise processes', and 'Improve employability'. A callout bubble explains that here users can see which organization or team goal their goal contributes to. At the bottom of the modal, there are fields for 'Colleagues' and '2020', and buttons for 'Cancel' and 'Create goal'. Navigation buttons 'Previous' and 'Next' are at the very bottom of the interface.

In the step "Team goals" you determine what you can contribute to the goals of your team or organization.

To what can you contribute?

Support

☐ Improve customer satisfaction

☐ Optimise processes

**New performance goal** Performance goal

**Name goal**

Give your goal a name (max 10 words)...

**Describe what you want to achieve (optional)**

Give your goal a description (optional)...

**Which steps are you going to take? (optional)**

+ Add action, result or training

**Team goals** Competencies

I will contribute to a team or organization goal (optional)

☒ Improve customer satisfaction

☐ Optimise processes

☐ Improve employability

Here you can see which organization or team goal your goal contributes to.

Keep the goal name short, so that you keep your goal overview readable. If you want to give more information, write this in the description.

Break down your goal into actions or measurable results

Cancel Create goal

Previous Next

What do you want to develop in the coming period? And how does this tie in with the competencies that are related to your position and the core values of your organization?

## ✓ Create your first development goal

The screenshot displays the 'Competencies' step in the Dialog platform. At the top, a navigation bar includes 'My position', 'Team goals', 'Competencies' (highlighted), 'Development', and 'Reminders'. A callout bubble explains: 'In the step “Competencies” you determine for yourself in which competencies or core values you can still grow.' Below this, an illustration shows a person climbing a staircase towards a trophy. The main heading asks 'What do you want to develop further?'. Under the 'Competencies' section, there are checkboxes for 'Teamwork' and 'Result driven'. A 'New development goal' modal is open, showing a form with fields for 'Name goal' (containing 'Teamwork'), 'Describe what you want to achieve (optional)', and 'Which steps are you going to take? (optional)'. The steps listed are: 'Identify and celebrate successes', 'Keep your promises', 'Share your thoughts and feelings', 'Ask others for their ideas', and 'Ask others for feedback'. A 'Create goal' button is at the bottom right. Another callout bubble states: 'Determine what behavior you will practise. Press the dots if you want to change a behavior.' The modal also shows a list of competencies: 'Teamwork' (selected), 'Result driven', and 'Customer centered', each with a green checkmark.

My position Team goals Competencies Development Reminders

Plan(3)

Notes

In the step “Competencies” you determine for yourself in which competencies or core values you can still grow.

What do you want to develop further?

Competencies

☐ Teamwork

☐ Result driven

New development goal

Development goal

Name goal

Teamwork

Describe what you want to achieve (optional)

Describe what you want to achieve (optional)

Which steps are you going to take? (optional)

- Identify and celebrate successes
- Keep your promises
- Share your thoughts and feelings
- Ask others for their ideas
- Ask others for feedback

+ Add action, result or training

Colleagues 2020

Create goal

Determine what behavior you will practise. Press the dots if you want to change a behavior.

I'm going to practice with competencies

- Teamwork If you improve your teamwork skills, you invest in improving relations with others and increase the chances of successfully achieving teamgoals.
- Result driven
- Customer centered

Previous Next

What other areas of personal growth would you like to focus on in the upcoming period? Think about your personal development goals such as your career path, education, or personal skills.

✓ Create a personal development goal

The screenshot displays the 'Development' step of a performance management process. At the top, there are tabs for 'My position', 'Team goals', 'Competencies', 'Development' (which is active), and 'Reminders'. On the right, there are links for 'Plan(4)' and 'Notes'. The main content area features an illustration of a person in a blue dress standing next to a large screen displaying a checklist, with gears and stars in the background. Below this, a section titled 'Are there other things you want to develop?' contains three questions, each followed by a text input field and an 'Add goal' button:

- Would you perhaps like to take the next step in your career?
- Would you perhaps like to take a certain (training) course?
- Would you perhaps like to further develop some skill?

Two callout boxes provide additional guidance:

- A blue callout box states: "In the step 'Development' you determine for yourself what you want to develop further."
- A dark blue callout box states: "For example, you can indicate the next step(s) related to your career aspirations and development."

At the bottom of the form, there are 'Previous' and 'Next' navigation buttons.



### 3. Keeping goals top-of-mind

It is important to keep enough focus on your goals in order to achieve them. That is why you can choose to receive an e-mail periodically with what you intend to achieve and develop. Determine the frequency with which you want to receive this e-mail.

✓ Choose how often you want to be reminded of your goals

The image displays two overlapping screenshots of the Dialog platform interface. The left screenshot shows a settings page titled "How often do you want to be reminded of your goals?". It features a list of reminder frequencies: "Every week", "Every other week", "Every month" (selected), "Every quarter", and "Never". Below the list is a dropdown menu currently set to "Monday". A blue callout bubble points to the "Every month" option, stating: "Determine for yourself how often you want to be reminded of your personal plan. The more you reflect, the faster you grow." The right screenshot shows an email interface with the Dialog logo at the top. The email body starts with "Hi Michael," and "How are your goals progressing? Here you find an overview of the things you want to achieve and develop." It lists "Performance goals" (Answer customer questions efficiently, Project: from customers to fans, Edit customer service script) and "Development goals" (Teamwork, Grow to senior). A blue "Update status" button is at the bottom. A blue callout bubble points to the "Plan(4)" tab in the top right corner of the email interface, stating: "See which goals you've added to your plan at any time."

## 4. Tracking progress

You optimally learn from what is going well and what can be improved if you regularly reflect on your goals. Moreover, it prevents any surprises during your periodic evaluation.

✓ Use the smiley to indicate how much confidence you have in your goals

**Michael Sanders**  
Customer service agent

**Performance goals**

- Customer service agent  
Answer customer questions efficiently  
How is this goal going? (Smiley icon)
- Develop mail templates for top 10 asked questions (2/10)
- Lower the average time for a phone call (3 minutes) (88%)

**Feedback from Chris Gilsing**  
★★★★☆  
Doing well. Try to involve colleagues even more and provides new insights.  
Apr 12, 2020

**Michael Sanders**  
On average my conversations last much longer because I give people (too) much room to talk. As a result, I regularly lose control. In the upcoming period I will try summarizing after the inventory phase and clearly state what I will do (apply structure).  
Feb 1, 2020

**Development goals**

- Teamwork
- Grow to senior

Callout boxes:

- Use a smiley to indicate how confident you are that you will achieve a goal.
- Regularly write down what your progress is, what you have achieved and what you still have to do.
- Define who can see your update.

## 5. Ask and give feedback

It is valuable to hear from others what you are already doing well and how you can improve in order to learn as much as possible. Feel free to ask your first feedback from a colleague now.

Take the opportunity to compliment a colleague. Your colleague will certainly appreciate that.

✓ **Send your first feedback request to a colleague immediately**

The screenshot shows the 'Feedback' section of the Dialog platform. The top navigation bar includes 'Goals', 'Feedback', 'Reviews', and 'Team'. The user 'Michael Sanders' is logged in. The interface is divided into 'About me' and 'Given' tabs. A search bar at the top allows users to search for goals, competencies, or employees. Two buttons, 'Give feedback' and 'Ask feedback', are visible. The 'Ask feedback' modal is open, showing a form to request feedback from a specific person or on specific goals/competencies. Callouts highlight the following features:

- Want to receive feedback on a specific goal or competency? Indicate this here.** (Points to the 'Goals and competencies' dropdown in the 'Ask feedback' modal)
- Click here to ask for or give feedback.** (Points to the 'Ask feedback' button)
- Define who can see the feedback.** (Points to the 'Colleagues' dropdown in the 'Ask feedback' modal)

The 'Ask feedback' modal includes a text area for the feedback question, an optional section for selecting goals or competencies, and a list of performance and development goals to choose from. The 'Performance goals' list includes 'Answer customer questions efficiently', 'Project: from customers to fans', and 'Edit customer service script'. The 'Development goals' list includes 'Teamwork' and 'Grow to senior'. The modal also shows a year selector set to '2020' and 'Send'/'Cancel' buttons.

## 6. Write your periodic evaluation

At the end of a period you look back on what you have achieved and developed.

While writing your evaluation in Dialog you immediately have all updates and feedback at hand. This saves you a lot of time and you and your manager have a complete picture of the entire evaluation period.

✓ Track progress on your goals. This way you save time in the evaluation.

The screenshot displays the 'Review 2020' interface for Michael Sanders, covering the period from January 1st to December 31st, 2020. The interface is divided into several sections:

- Performance goals:** Includes 'Answer customer questions efficiently', 'Project: from customers to fans', and 'Edit customer service script'. Each goal has a progress bar and a 'What have you achieved?' text input field.
- Development goals:** Includes 'Teamwork' and 'Grow to senior', each with a 'What have you learned?' text input field.
- Key results and actions:** Shows 'Develop mail templates for top 10 asked questions' (6/10) and 'Lower the average time for a phone call (3 minutes)' (COMPLETED).
- Updates:** A timeline of updates from Michael Sanders, including a post from June 2, 2020, about developing 6 templates and a post from February 1, 2020, about conversation length.
- Feedback:** A section for feedback from Nabil Can, dated April 12th, 2020, with a 4-star rating and a comment about the mail templates.

Two callout boxes provide additional context:

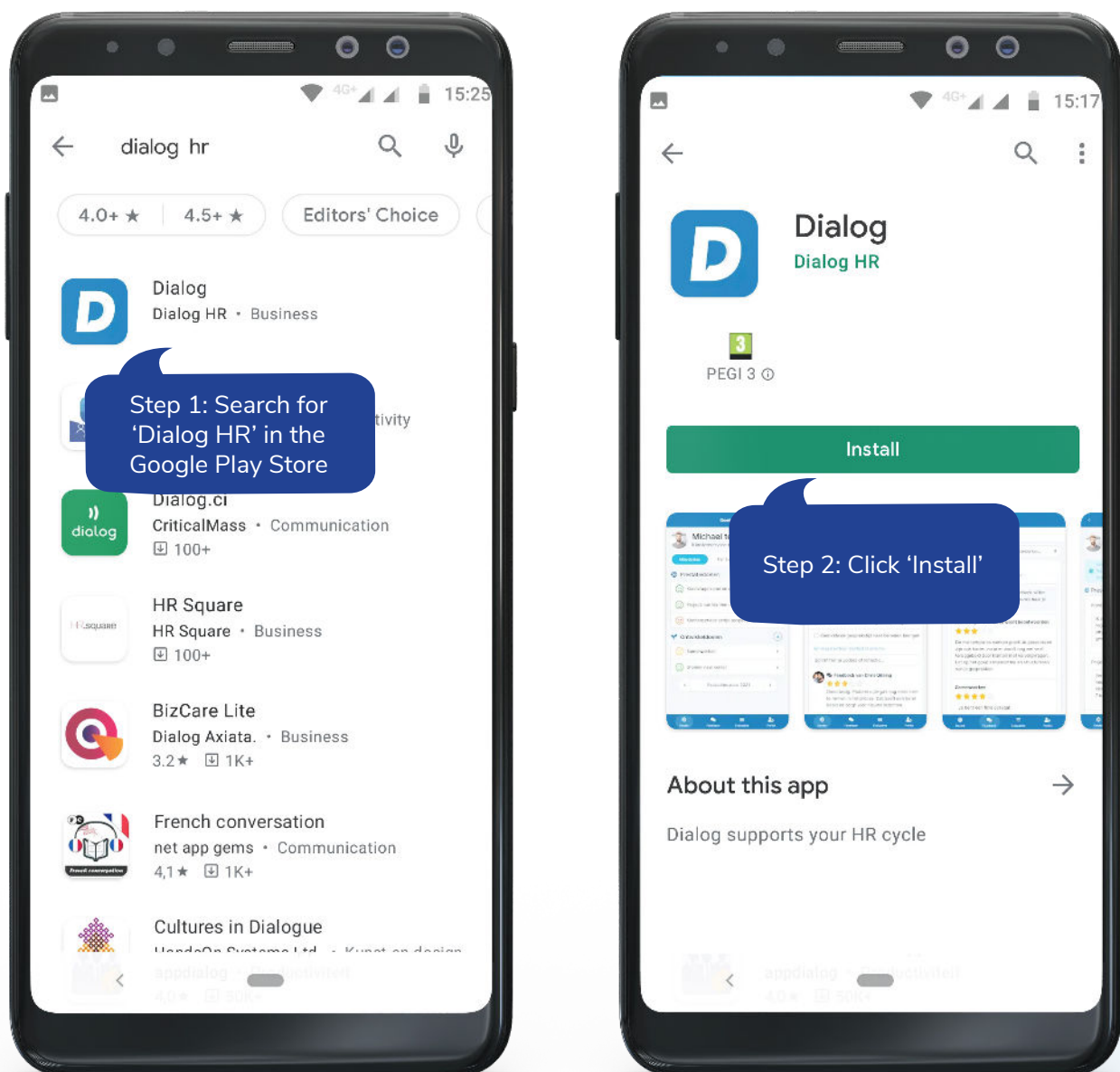
- A blue box at the bottom left says: 'Save your evaluation as a draft without anyone else being able to view it.' Below this is a 'Save as concept' button.
- A blue box in the center says: 'Here you can see your own updates and the feedback you have received about the goal you are evaluating. This makes evaluating your progress a lot easier!' Below this is a 'Save & send' button.

At the bottom of the interface, there is a note: 'This section has to be filled out only by you' and a 'Write your answer here' text input field.

## 7. Install our mobile app - Android

Update your goals and request or provide feedback when it suits you. That is of course easiest if you always have the app at hand. So put it on your phone now. With an Android phone you do this like this:

✓ Immediately download the app from the Google Play Store

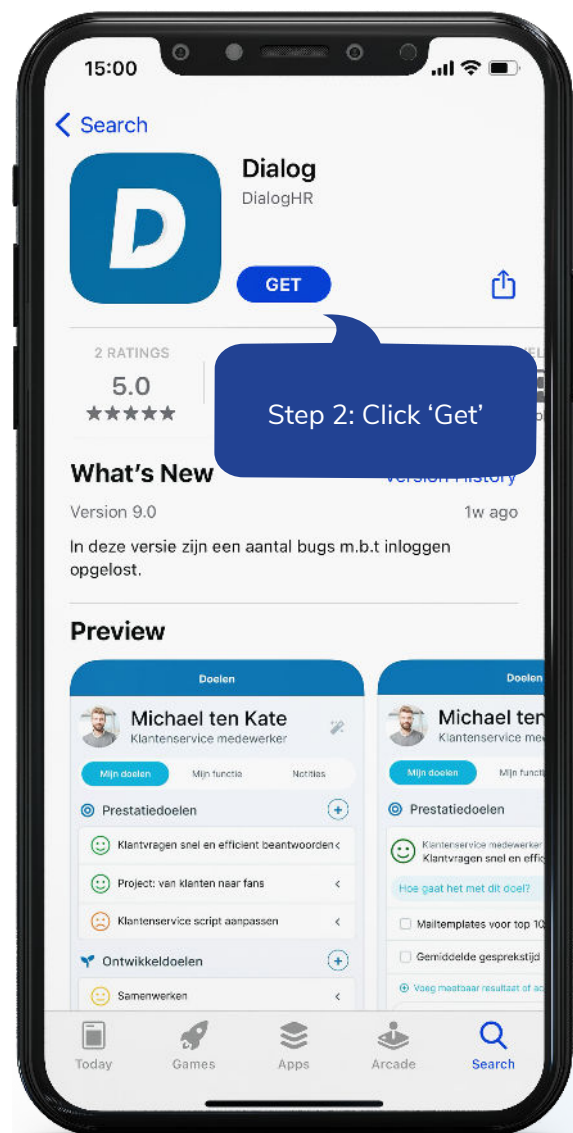
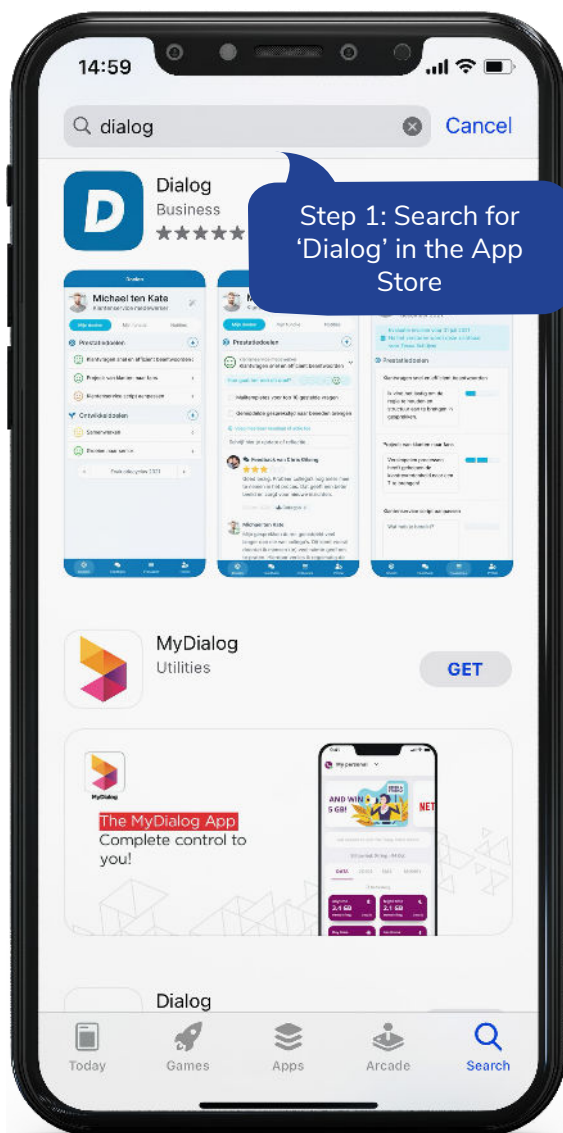




## 7. Install our mobile app - iPhone

Update your goals and request or provide feedback when it suits you. That is of course easiest if you always have the app at hand. So put it on your phone now. With an iPhone you do this like this:

✓ Immediately download the app from the App Store



## More information

Do you have any questions about the online platform? Check out our FAQ page ([dialog.zendesk.com](https://dialog.zendesk.com)). Here you will find explanations and tips about all the possibilities of our platform.

Prefer personal contact? Mail or call our service staff:  
[support@dialog.nl](mailto:support@dialog.nl) or +31 030 7600 290.