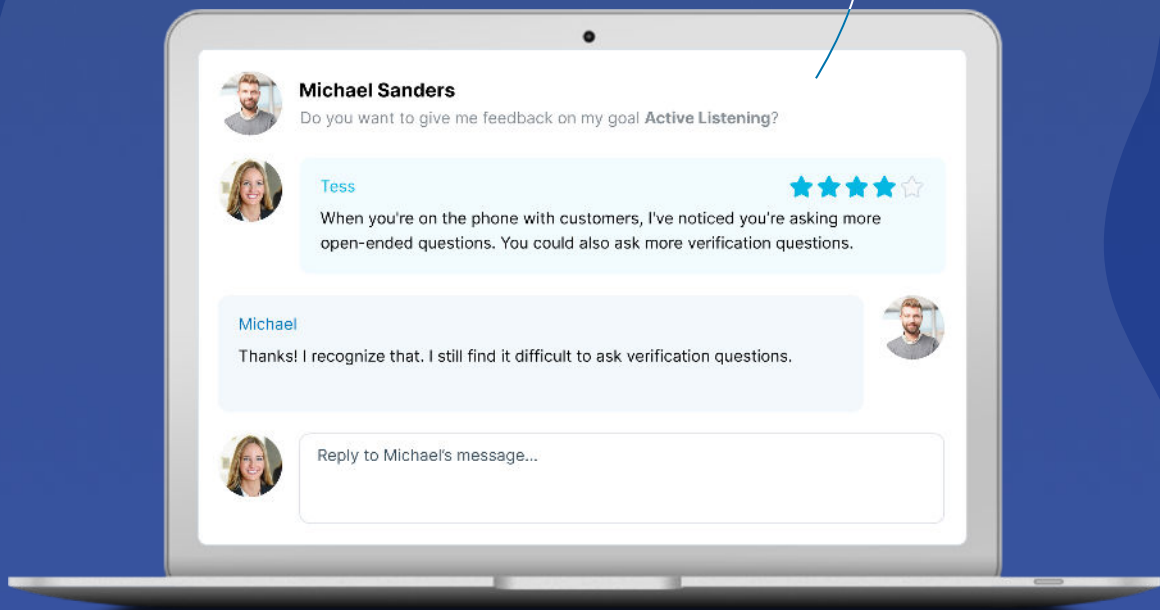


D Dialog

Tips & tricks



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!

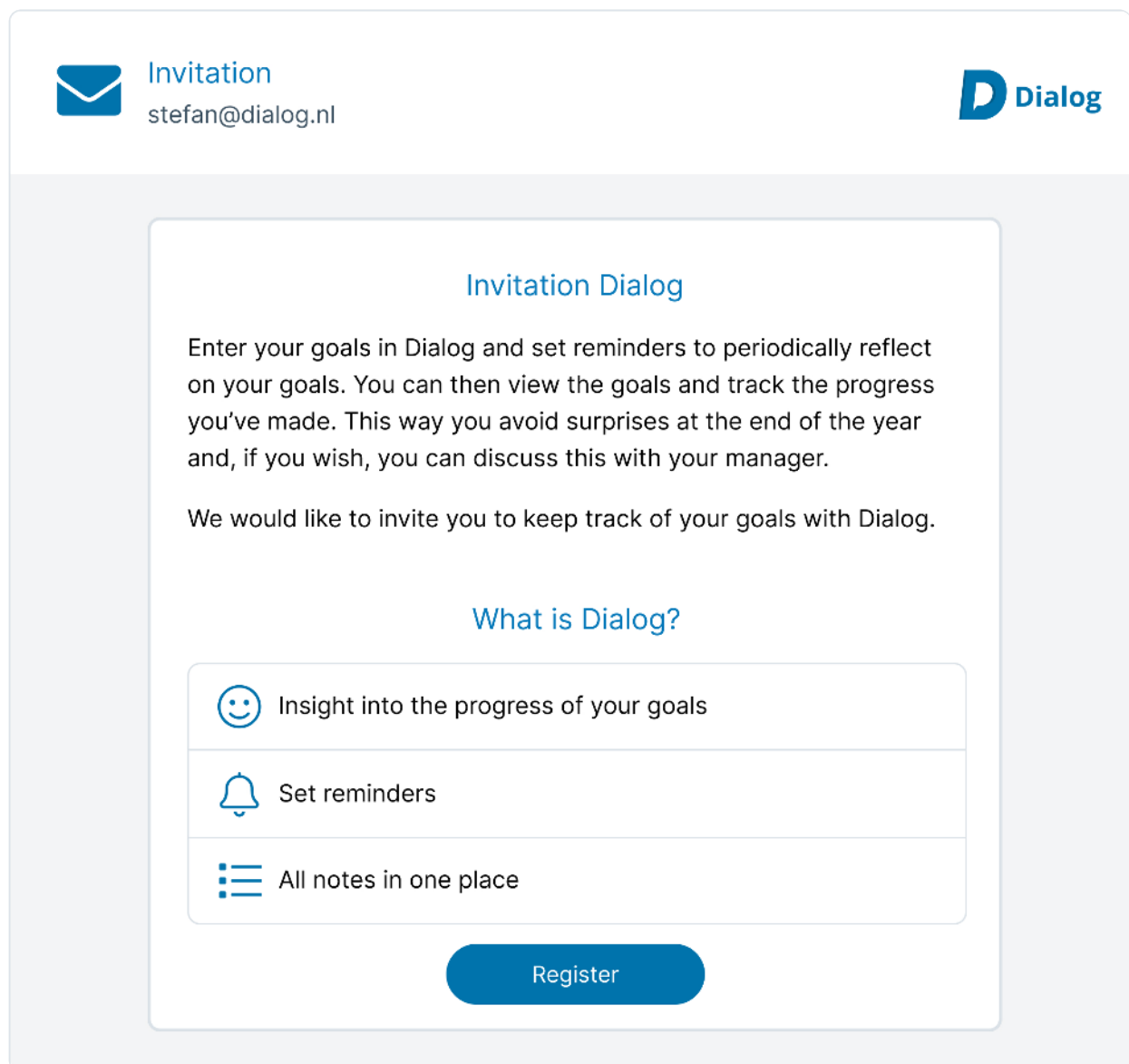
Table of content

✓ Registration	03
✓ Create a personal plan	05
✓ Keeping goals top-of-mind	09
✓ Tracking progress	10
✓ Ask and give feedback	11
✓ Write your periodic evaluation	12
✓ Install our mobile app	13
✓ More information	15

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.

✓ 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!**



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 a user interface for creating a goal. At the top, there are tabs for 'My position', 'Team goals', 'Competencies', 'Development', and 'Reminders'. The 'My position' tab is active. A navigation bar on the right shows 'Plan(1)' and 'Notes'. The main content area has a heading: '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 goals is shown with checkboxes: 'Answer customer questions efficiently' (checked), 'Maintain customer service scripts', 'Directly transfer customers to the right department', and 'Keep industry knowledge up to date'. Below the list is a button '+ Add your own goal'. At the bottom, there are 'Previous' and 'Next' navigation buttons.

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

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

Team goals

Competencies

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

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

Improve customer satisfaction

Optimise processes

Improve employability

<

2020

>

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

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

Colleagues

2020

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

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

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

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

Colleagues 2020 Create goal

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

My position Team goals Competencies **Development** Reminders

Plan(4)
Notes

In the step "Development" you determine for yourself what you want to develop further.

Are there other things you want to develop?

Would you perhaps like to take the next step in your career?
+ Add goal

Would you perhaps like to take a certain (training)
+ Add goal

Would you perhaps like to further develop some
+ Add goal

Previous Next

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.

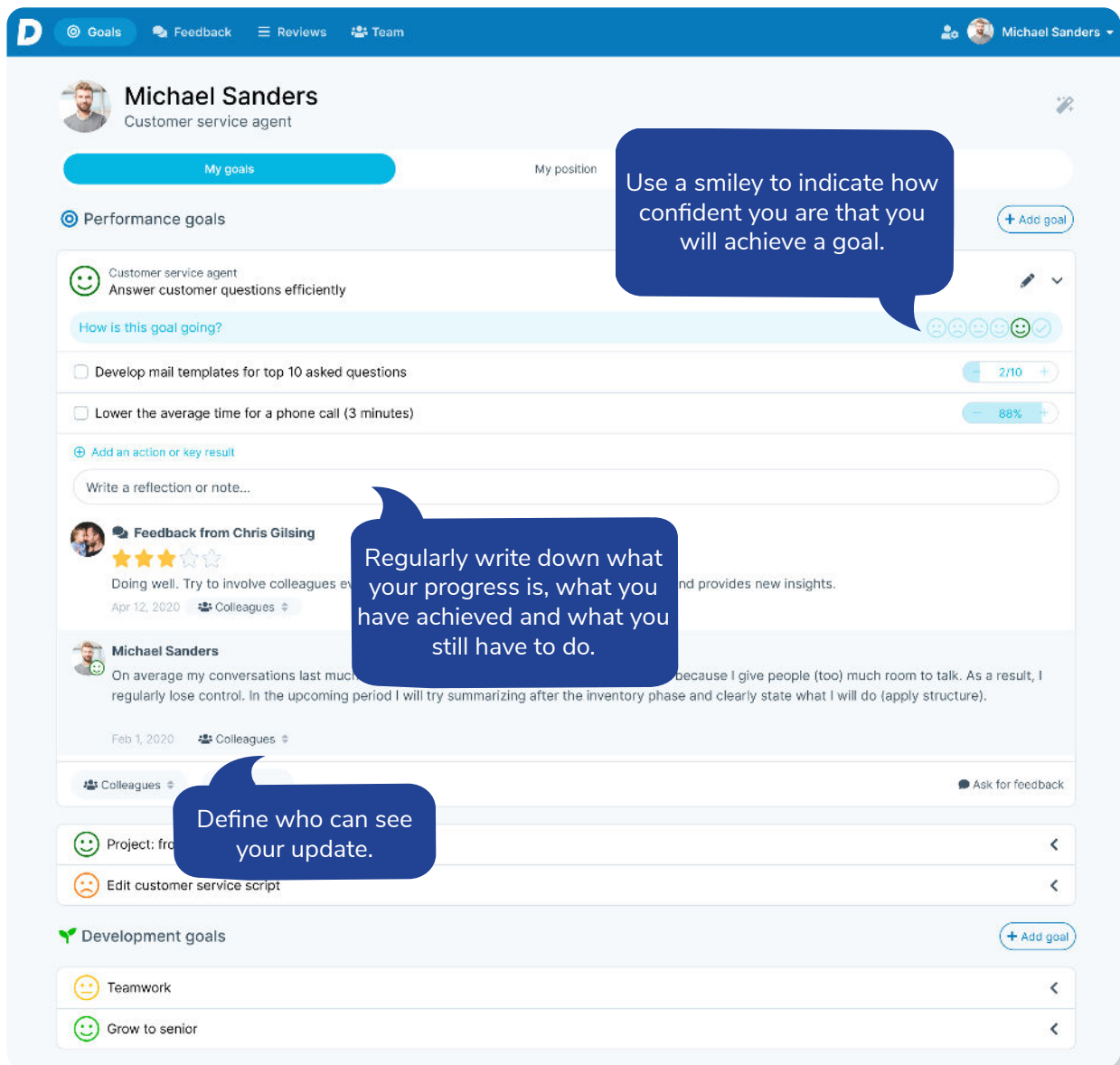
✓ Choose how often you want to be reminded of your goals

The image shows two screenshots from the Dialog app. The left screenshot is 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". At the bottom of the page are "Previous" and "Complete" buttons. A blue callout bubble points to the "Every month" option with the text: "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 content includes a greeting "Hi Michael," followed by an overview of performance and development goals. Under "Performance goals", there are three items: "Answer customer questions efficiently" (green smiley), "Project: from customers to fans" (green smiley), and "Edit customer service script" (orange frowny). Under "Development goals", there are two items: "Teamwork" (yellow smiley) and "Grow to senior" (green smiley). An "Update status" button is located at the bottom of the email content. A blue callout bubble points to the top navigation area with the text: "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



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

Search for goal, competency or employee... [Give feedback](#) [Ask feedback](#)

Feedback from **Nabil Can**
12 Apr. 2020 [Colleagues](#)

Michael Sanders: I'm curious whet... have are more than welcome.

Ask feedback

Ask feedback from:
Enter a name or e-mail address

[Goals and competencies](#)

Ask your feedback question here...

Optional: Ask for feedback on your goals or competencies
Select these on the right side or add all goals

Performance goals

- Answer customer questions efficiently
- Project: from customers to fans
- Edit customer service script

Development goals

- Teamwork
- Grow to senior

< 2020 >

[Colleagues](#) [Cancel](#) [Send](#)

Define who can see the feedback.

Want to receive feedback on a specific goal or competency? Indicate this here.

Click here to ask for or give feedback.

Thanks Daniel! Nice to read that you liked working with me. I will definitely pay more attention to the way I organize information in a next project.
12 Apr. 2020

Write your reaction here...

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.

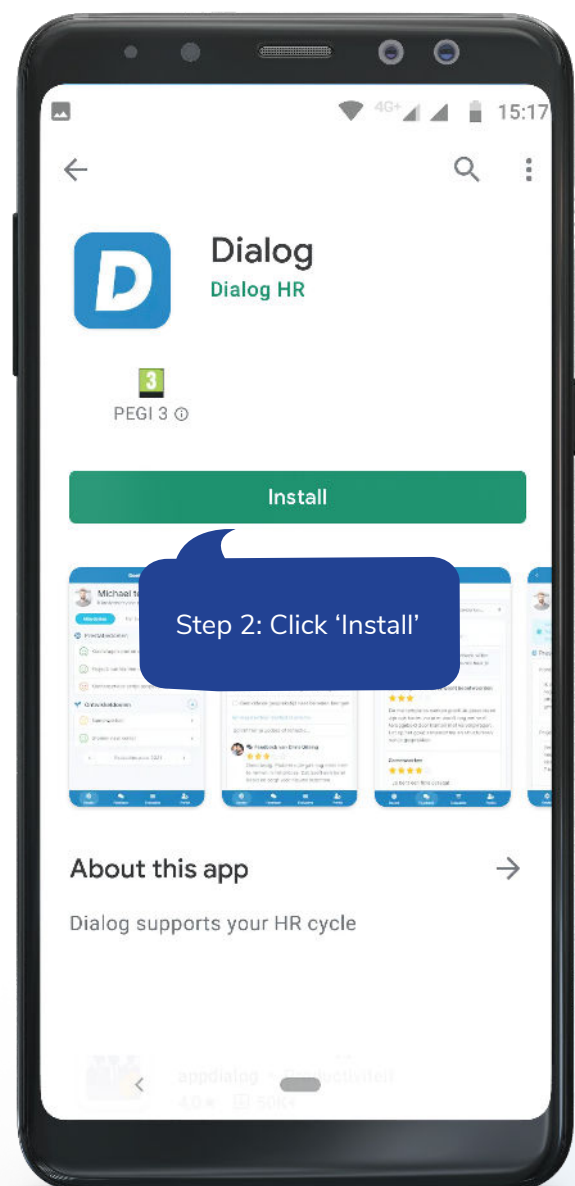
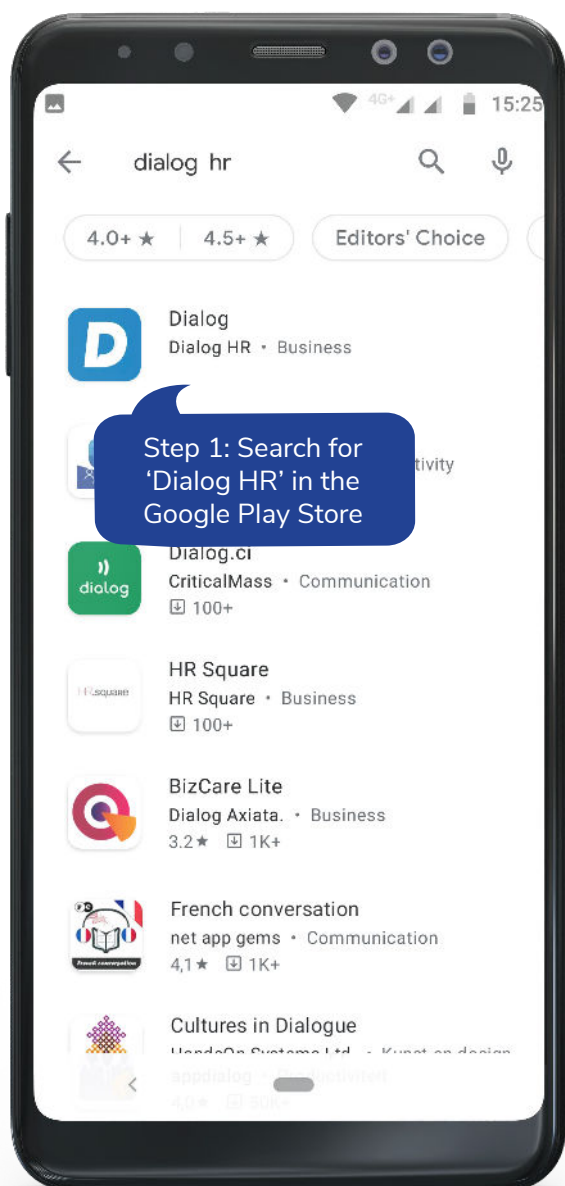
✓ Track progress on your goals. This way you save time in the evaluation.

The screenshot displays the Dialog interface for a 2020 review. The top navigation bar includes 'Goals', 'Feedback', 'Reviews', and 'Team', with the user's name 'Michael Sanders' on the right. The main content area is titled 'Review 2020' for 'Michael Sanders, January 1st 2020 - December 31st 2020'. A light blue banner prompts the user to 'Write your self-evaluation' with a deadline of 'Submit before December 31st 2020'. Below this, there are sections for 'Performance goals' and 'Development goals'. The 'Performance goals' section includes three goals: 'Answer customer questions efficiently', 'Project: from customers to fans', and 'Edit customer service script'. Each goal has a text input field for 'What have you achieved?' and a progress indicator. The 'Development goals' section includes 'Teamwork' and 'Grow to senior', also with text input fields and progress indicators. On the right side, there is a 'Key results and actions' section with two items: 'Develop mail templates for top 10 asked questions' (6/10) and 'Lower the average time for a phone call (3 minutes)' (COMPLETED). Below this is an 'Updates' section with two entries from Michael Sanders, dated June 2, 2020, and February 1, 2020. The 'Feedback' section at the bottom right shows a review from Nabil Can, dated April 12th, 2020, with a 4-star rating and a comment: 'The mail templates that you have developed work well! Your conversations are also shorter, but there are still many customers that call back with questions. Make sure you summarize and structure your conversations.' At the bottom of the interface, there are two buttons: 'Save as concept' and 'Save & send'. A callout box points to the 'Updates' section, stating: '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!'. Another callout box points to the 'Save as concept' button, stating: 'Save your evaluation as a draft without anyone else being able to view it.'

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:

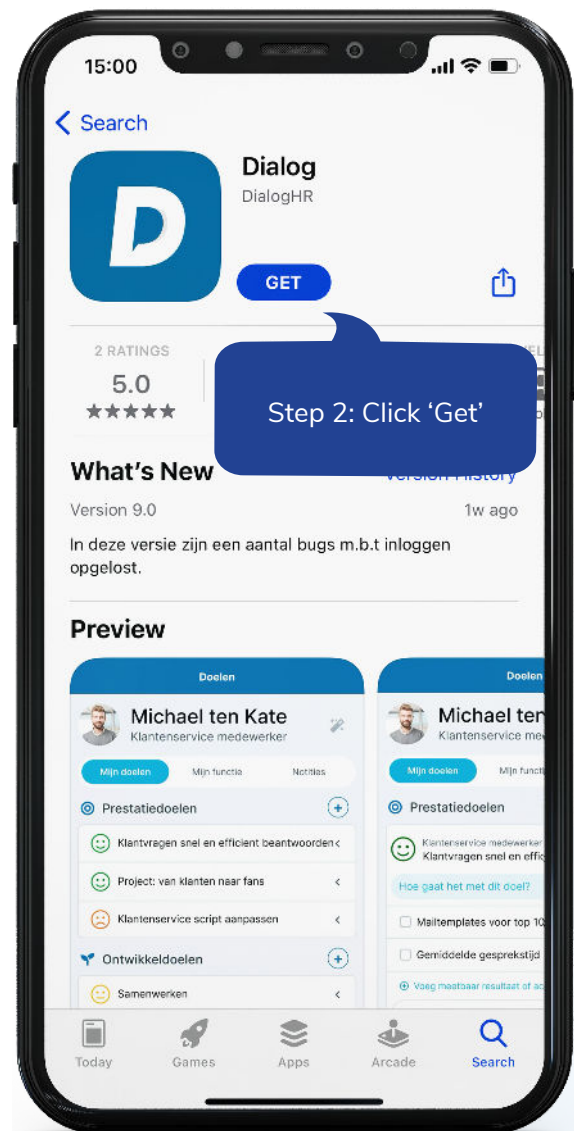
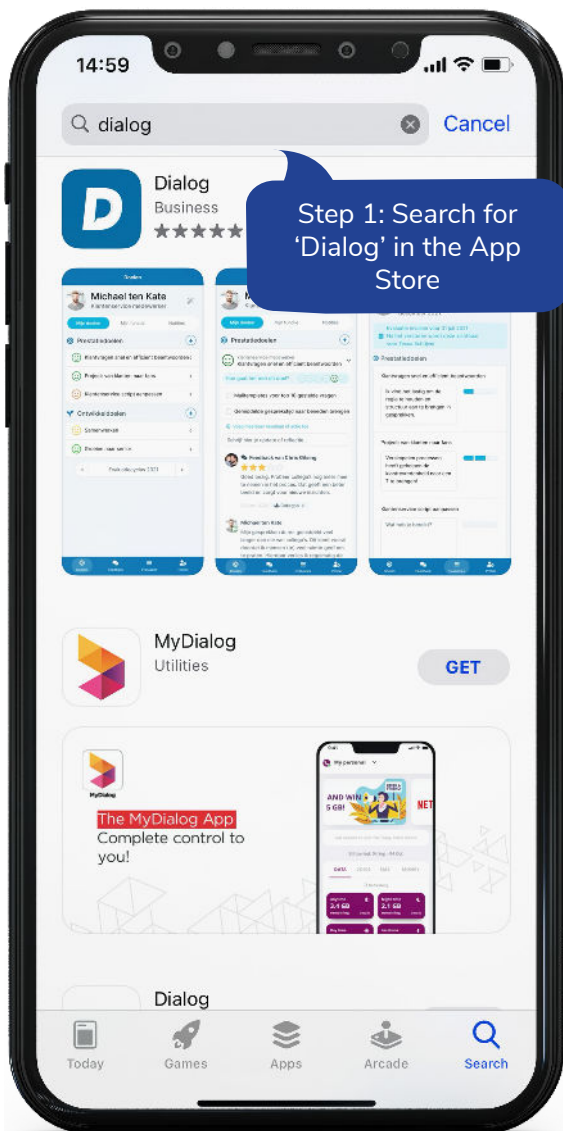
✓ Immediately download the app from the Google Play Store



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). 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 or +31 030 7600 290.