User Guide Dialogue

For administrators and managers
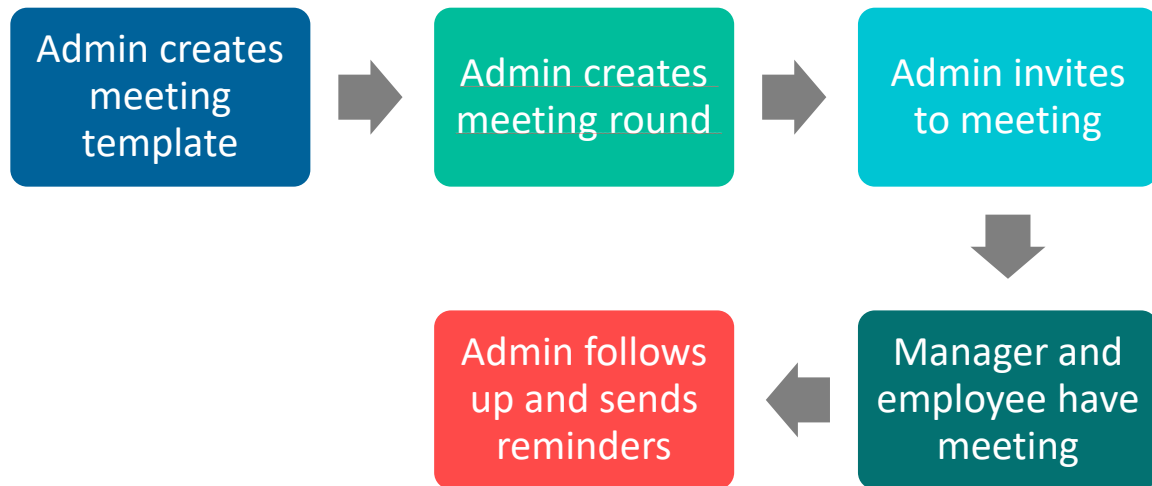
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Table of Contents

s:mployer

s:mployer

1 Dialogue

1.1   The Process from an Admin Perspective

Admin creates meeting template → Admin creates meeting round → Admin invites to meeting → Manager and employee have meeting → Admin follows up and sends reminders

1.2   The Process from a Managerial and Employee Perspective

E-mail invite → Answer questions and look at history → Share answers → Manager and employee have meeting → Employee signs meeting → Manager signs meeting
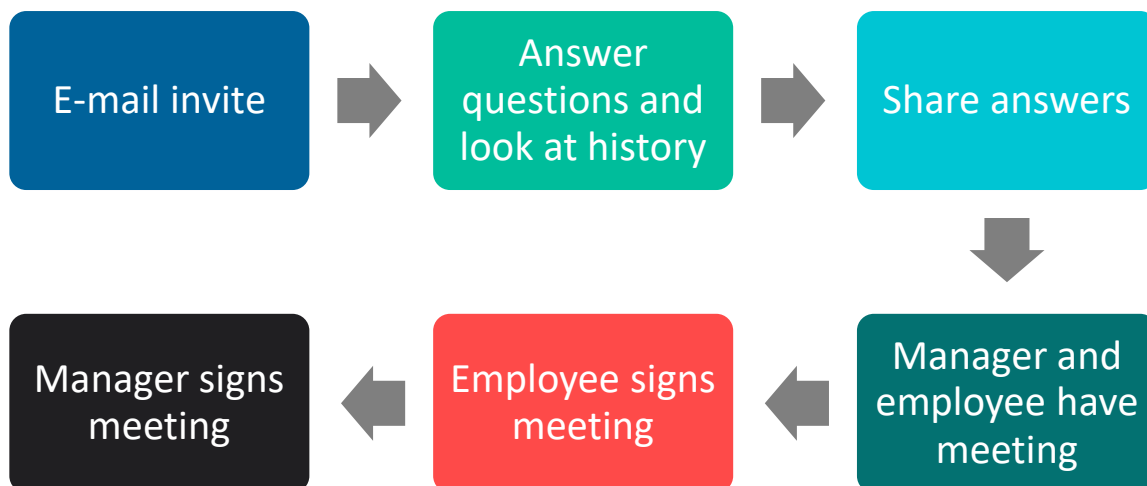
1.3   Target Audience

The target audience for the Dialogue module is organizations looking for support in planning, executing, and following-up on meetings. This guide is intended for Dialogue and system administrators but may also be used by managers and, for example, HR Business Partners.

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1.4   Objective and Purpose

The objective is to facilitate the handling of and to improve the quality of structured meetings.

- Employees will be better prepared for the meeting.
- Managers have an outline to follow.
- The organization can ensure that all meetings are carried out the same way.
- Meeting history is saved in a GDPR-approved location.
- The organization can follow up that all meetings have been completed.

1.5   Managing Meeting Templates

1.5.1   Working with Meeting Templates

All meetings must be based on a meeting template. Once you have finished the meeting template, you can create meeting rounds based on it. Please note that once a meeting has been completed, it is no longer possible to edit the meeting template that the meeting is based on.

Please note that changes to a question in a copied meeting template also changes the question in the original template and vice versa. Thus, the questions are the same.

1.5.2   Name of Meeting Template

It may be a good idea to choose a name that clearly describes the template. The name and description of the meeting template are not visible to the employee.

1.5.3   Choosing Work Flow in Meeting Template

When you create a meeting template, you choose whether meetings created with the template should require preparation.

Direct Meeting means that the participants do not have to enter the meeting form before the meeting takes place. There is nothing for the participants to fill out; the form is only used in order to document what is said and decided on during the meeting itself. The manager is the one who will fill out what is decided on during the meeting.

Meeting with preparation means that both employee(s) and manager(s) prepare by answering the questions in the meeting form. They share the answers with one another before the actual meeting is carried out. During the meeting, the manager will document what is decided as conclusions of each question.
If you do not wish for the meeting participants to be able to view the other person's shared answers before they have shared their own answer, you must check the options

- Managers must share their feedback before they can view the employee's self-assessment.
- Employees must share their own assessment before they can view the manager's feedback.

You may, however, choose to have only the manager or the employee answer some of the questions in the preparation.

1.5.3.1   Choose Individual or Group Meeting in Meeting Template
The meetings are usually carried out between a manager and an employee. In that case, the option Individual Meeting is used. If several employees are having the meeting with the manager, the setting Group Meeting is selected instead.

1.5.3.2   Template for Calendar Invite to Meetings
Template for invite is only used if integration with calendar is activated (contact your account manager if the need should arise). Add a template for invite if you want managers scheduling meetings to have a pre-filled text in their calendar event sent to the employees mentioned in the invite. The pre-filled text will be possible for the manager to change at each scheduling event - so the template is only meant to facilitate and clarify for managers.

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1.5.3.3   Create Help Section on the Meeting Displayed to Managers or Employees

This function means that the user will receive an automatic pop-up help window the first time they access the meeting documents. Use the help section to explain what your organizational process looks like and how this meeting in particular works. Once the user has closed the help window, it is always accessible from the Help button at the top of the page. You may choose to use different help sections for managers and employees.

1.5.4   Automated Notifications for Meeting Templates

Under the tab E-mail and SMS, you select which automated mailings are to be connected to the meeting template. You can turn off and on the existing pre-defined notifications via the On/Off button on the left side.

If you place the marker to the right, you may edit the event itself that will trigger a notification. You can delete the event, edit the number of days, change notification template to be sent or edit the connected notification template.

You click on the right to preview, edit or create a new notification template.

1.6   Access to Meeting Templates

The button for the Admin access to a meeting template is displayed when you place the cursor to the right of the template. Usually, this button does not need to be used, but it may be necessary sometimes. However, make sure to read what is stated below before you do so.

The following access levels may be used:

- **Read** (Level 1): can view the template
- **Add** (Level 2): may create own rounds using the template and can view and manage their own created rounds.
- **Edit** (Level 3): views all rounds based on the template **(NB!)**
- **Full access** (Level 4:) same as all the above + may delete the template

Note! Be careful with these settings. If you feel unsure, we recommend you contact your account manager or support since changes here   may unintentionally grant employees access to completed meetings.

1.7   Working with Content in Meeting Templates

The contents of a meeting template are managed under the tab **Contents**.

1.7.1   Adding Sections to Meeting Template

A meeting template is based on sections, which in turn includes one or more questions.

The name of a section is changed under the button on the right. Using the arrows, you can also move an entire section downwards or upwards in the template.

1.7.2 Instructions in Meeting Template

You can add an instructional text in a meeting template in order to give instructions or introduce a section. Here you can also enter images and, using HTML-code, you can post buttons, links, videos etc.

1.7.3 List Box Question in Meeting Template

Here you enter a question that the employee and the manager will answer by selecting a value in a drop-down list.

You state which values to include in the list box by entering the values with a line break between each value.

1.7.4 Competency Assessment Question in Meeting Template
When included in a meeting template, the competency question will display the employee's current roles and competencies. This requires that the organization uses the Competency Module.

In the preparation phase, employee and manager can independently fill out their assessment of the employee's competency. A suggested raise is displayed as an arrow pointing upwards, with a number stating how many steps upwards.

After sharing, employee and manager can see the other's suggestions (depending on the settings for sharing in the template it may be required for one person to share in order to view the other person's suggestion). After sharing, a Conclusion-assessment is shown where the manager sets the final level during the meeting with the employee.

Questions where a final level has not been set are marked with a question mark.

The conclusion regarding a competency question is stored as the employee's actual competency in the Competency Module as soon as the manager signs the meeting. If there is no conclusion, the manager's suggestion will be used as a new actual competency. The current competency levels are not displayed in the signed meeting, but rather the levels that the employee had at the start of the meeting. Both parties' suggestions for changes are displayed.

1.7.5 Text Questions in Meeting Template

Text questions in meeting templates may be used when a more argumentative answer is needed or when there are not a given number of potential answers.

A text question is based on the employee writing down their answer as text instead of choosing an option or a level.

1.7.6 Sliding Scale Question in Meeting Template
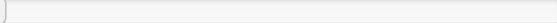
Here you enter a question that the employee and the manager will answer by selecting a value on a slider scale.

You state which values to include in the slider scale by entering the values with a line break between each

option.

Please note that the stored answer will become a % value, and not the values you enter in the box of alternatives - these only explain what the scale means.

The steps in the slider scale question name which points to be shown on the slider. Using the setting Fixed Points, you state whether the slider should stop on the options, or whether it should be possible to place the marker between steps.

We recommend that you use at least two steps. The steps you name will be distributed evenly across the slider.

1.7.7 Appendix Questions in Meeting Template

Appendix questions may be used to upload material or documents created using other forums. There the answer to the question is submitted by uploading a file.

1.7.8 Succession Questions in Meeting Template

A succession question is only displayed to the manager during a meeting. The available succession questions are:

Potential = Slider scale where you register the employee's potential.
Performance = Slider scale where you register the employee's performance.
Risk of resignation = Slider scale where you register the risk of the employee's resignation.
Consequence of resignation = Slider scale where you register the consequence of the employee's resignation.

The succession questions cover the same parameters as the succession module. The choices recorded by the manager during the meeting will update the employee's potential, performance, and risk of resignation in the succession module with the accompanying reports.

1.7.9 Update Personal Information in Meeting Template

Adding "Update Personal Information" to a meeting template means that the user will be asked to answer questions that will update the profile page. For the information to be visible on a user's profile page, however, that particular user field must be switched on.

The questions that may currently be handled via this function are:

- whether you may consider working at a different location than the current one
- when you plan to retire.

The manager will not answer these questions but may view the employee's answers.

1.7.10 Question Settings

Question text
What is the project department's most important focus area for the next year?
Enter a question that can be answered by selecting a choice in a dropdown.

Alternatives
Profitability
Cooperation within the team
Cooperation with other departments
Clear objectives

Enter each alternative on separate lines (use Enter key between). Note! Add the least good alternatives first, the better alternatives last.

Settings

Save Cancel Delete

Question text
What is the sales department's most important objective for the next year?
Enter a question that can be answered by selecting a choice in a dropdown.

Alternatives
Profitability
Cooperation within the team
Cooperation with other departments
Clear objectives

Enter each alternative on separate lines (use Enter key between). Note! Add the least good alternatives first, the better alternatives last.

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Alternatives
Profitability
Cooperation within the team
Cooperation with other departments
Clear objectives

Enter each alternative on separate lines (use Enter key between). Note! Add the least good alternatives first, the better alternatives last.

Settings

☐ Private
The question/information will not be shown to the other party, not even after sharing or signing.

☑ History
Enables the possibilty to see previous answers.

☑ Conclusion
Enables the possibility to set a mutual answer/value after discussion.

☐ Activities
Enables the possibility to add activities.

☐ Include in final score   Weight [   ]
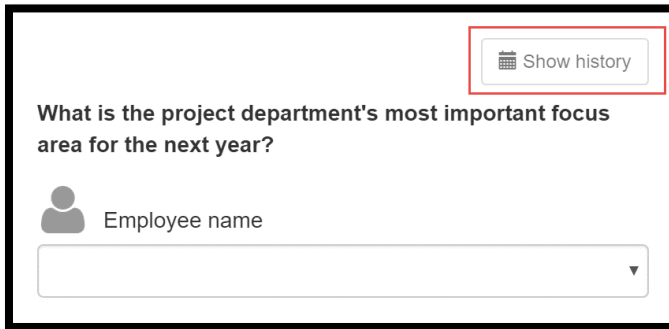Should this question be included in the final score? If so, what weight should it have.

1.7.10.1   Private
If you mark a question as Private, only the party who is asked the question will be able to see it and the answer, even after the meeting has been shared.

1.7.10.2 History

For certain types of questions, it is possible to choose whether to display the question's history. This means that the employee and the manager can view the history for a question from previous meeting sessions.

The history will display the answers of both the manager and the employee as well as the conclusion on the matter. For history to be displayed, the meeting must be based on the same meeting template or a meeting template that is a copy of the original meeting template.

It is also possible to link a question from another meeting template in order to include history.

1.7.10.3 Conclusions in Questions

For certain questions, it is possible to choose under **Settings** whether the question should have a conclusion. The idea of including a conclusion is for the manager and employee to first answer the question individually and then reaching a conclusion during the meeting.

Only the manager can enter the conclusion.

1.7.10.4 Activities

In addition to Conclusion, it is common to add the option of connecting an activity to be performed by the employee. This activity is of the same type as the activities that may be added from the Goals or Me modules. It can either be a practical activity for the employee to perform or an activity from the course catalog. Only the manager can add activities to meetings.

1.8 Managing Meeting Rounds

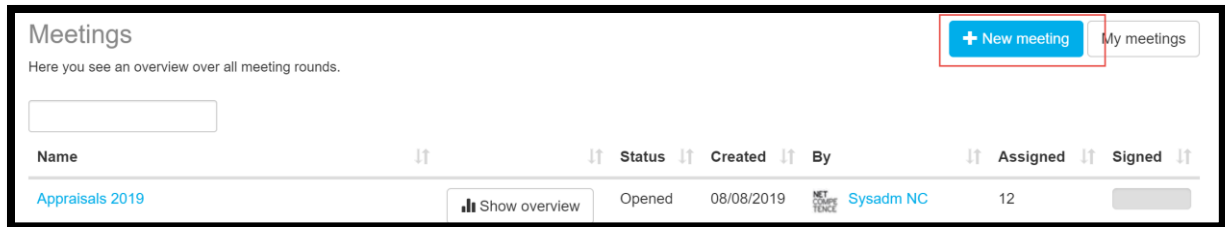### 1.8.1 Working with Meeting Rounds

A meeting round is created in order to enable connecting individuals to meetings. In a meeting round, each employee may be invited to meetings once (except if the employee has several managers, in which case they may be invited to 1 meeting per manager in that round).

A meeting round may include anything from 1 individual meeting to thousands, e.g.

- If the company holds annual performance reviews with all employees, one meeting round per year is required (where all use the same meeting template).
- If a manager wants to have monthly debriefings with all their employees, that manager will create one meeting round each month for themselves and their group.
- If it is company policy that each manager shall have monthly debriefings with all employees, Admin will create a meeting round each month for the entire company.
- If a manager wants to have an ad hoc meeting with an employee on a single occasion, that manager will create a meeting round.
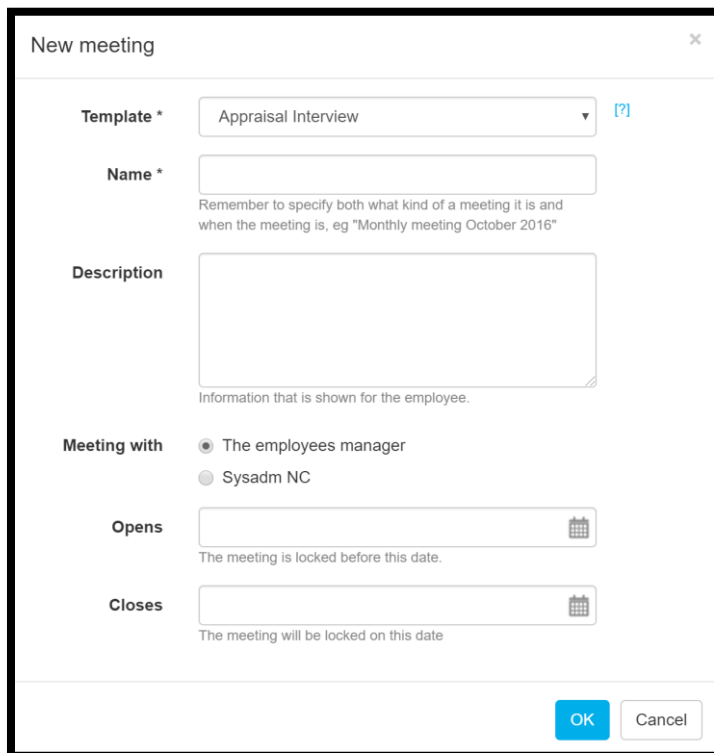
We recommend that HR manages the meeting rounds and invites employees. If managers need to do so, each meeting they create will become a separate meeting round and the follow-up will be very obscure. In addition, managers will then require access to add meetings based on the template in question.

1.8.2 Dialogue Box for New Meeting Round

All meetings must be based on a meeting template. Click on **New meeting** to create a new round.

Then select which template to base the meeting round on, the name of the meeting, and whether the meeting should only be open between specific dates. Name and any description are displayed to the employees.

If the meeting has specific dates, it is visible to the participants outside of these dates, but the meeting cannot be opened.

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The next step is to select groups to invite to the meeting. Once you've selected a group, all participants in that group are visible further down on the page.

You may now choose to invite all members of the group or only individual employees. When an employee is invited, the meeting also becomes available to their manager.

If the manager is the one creating a meeting round, he/she shall enter the same round to invite other employees they want to hold the same type of meeting with. If they create a new meeting, this will create new rounds, which leads to very many meetings.

1.8.3   Edit Meeting Round
You can edit a meeting round once it's been created and employees have been invited, but you cannot change the meeting template.

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1.9 Meeting History

1.9.1 Opening Log

When a meeting is opened by an employee, a manager, or a meeting administrator, this is logged in the opening log.

1.9.2 Allow Access for New Manager

By default, a completed meeting is locked to a new manager if the employee has changed managers since the completion of the meeting. For the content of a completed meeting to be accessible to a new manager, an administrator or the employee in question must unlock it.

1.10 Following Up Completion of Meeting

1.10.1 Overview in Meeting Rounds

Directly in the meeting round, you will see status for managers and employees via the two pie charts.
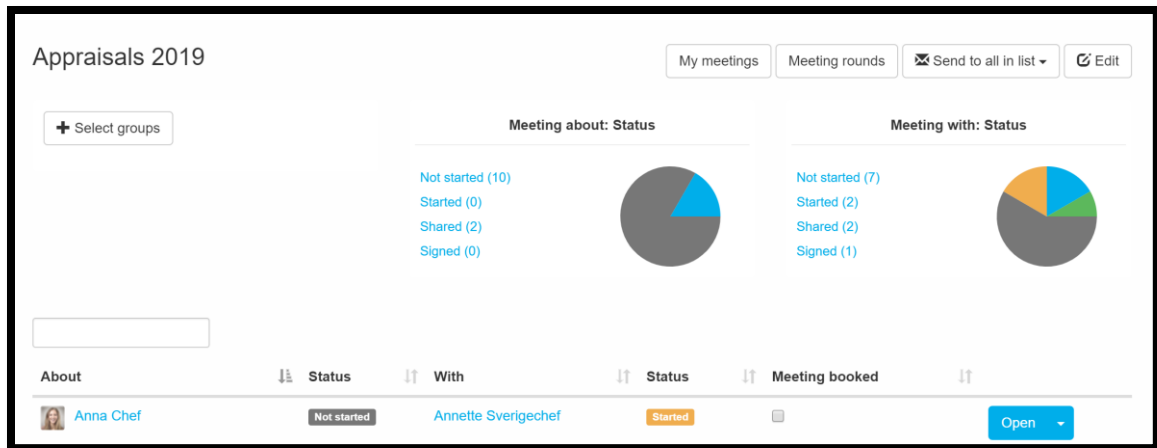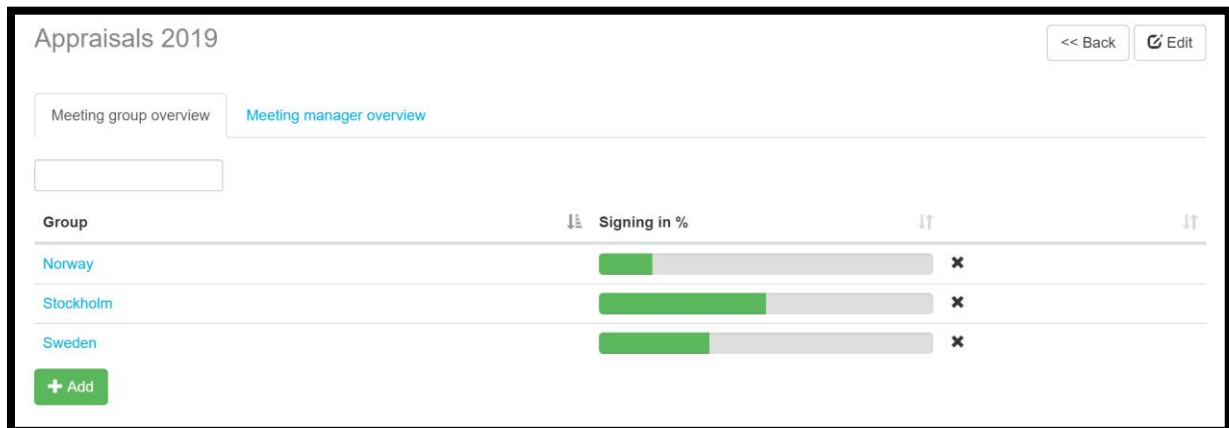

If you click on a status, you will filter the people with that status. You can also send mailings to the filtered users.
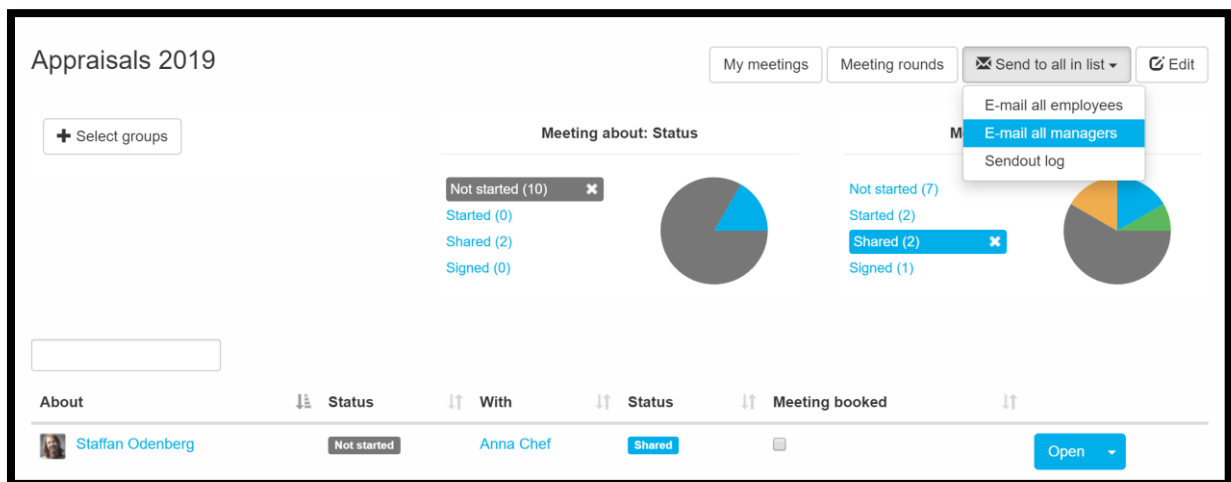
On the page of meeting rounds, you can see all meetings you have access to. By clicking Show overview, you can view specific data for that particular meeting.

On the tab **Meeting - group overview** you can choose to view the percentage of completion for specific groups. Click **Add** to select group.

You can also choose to combine, for example, an access group and an organization unit.

The tab Meeting manager overview displays the meetings grouped by responsible manager. Here you can also choose to send a reminder to selected managers or to all managers.

1.10.2 Report description: Meetings group overview

In this report, you can view the signing percentage for a specific meeting round by selected groups. The report also calculates the number of employees in each group and how many of them were invited to the meeting. This facilitates the identification of employees who have not been invited (e.g. because the group includes new hires or because employees have changed groups).