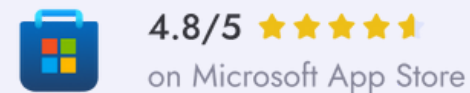
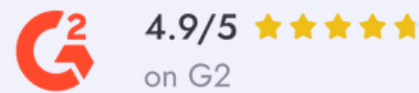
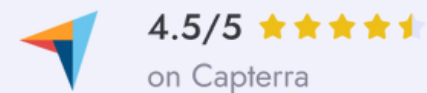




Teamflect Use Cases



The screenshot shows the Teamflect dashboard for user Adele Vance. The interface includes a sidebar menu with options: Home, Goals, Meetings, Tasks, Reviews, Survey, Feedback, Recognitions, Notes, User Search, Upgrade Now, Invite People, Reports, and Adele. The main content area is titled 'Hello, Adele Vance' and includes a 'Me My People' dropdown. It features three sections: 'My upcoming meetings' with three items (Adele-Mariam 1-1 meeting, Monthly Team Check-In, Weekly with Managers), 'My active goals' with a list of 7 goals and their progress percentages, and an 'Overall Progress' summary showing 33% completion. A legend for goal status is provided at the bottom right.

My upcoming meetings

- Adele-Mariam 1-1 meeting (Nov 10th 2023, 2:00 PM - 3:00 PM)
- Monthly Team Check-In (Nov 10th 2023, 5:00 PM - 5:30 PM)
- Weekly with Managers (Nov 10th 2023, 5:00 PM - 5:30 PM)

My active goals 37

- Launch at least four successful promot... (10%)
- Complete 10K sales (0%)
- Increase sales from 300K to 500K (23%)
- Work on my presentation skills (50%)
- Increase sales by 10% (0%)
- Reduce employee turnover (0%)
- Increase sales by 10% (0%)

Overall Progress 33%

Legend: No Status (grey), On Track (green), At Risk (yellow), Off Track (red), Closed (blue)

Everything performance management — right where you already do all of your work

The presentation will feature real-world use cases, step-by-step processes, and the benefits derived from each module, providing a comprehensive overview of how Teamflect can be a game-changer for your organization's performance management needs.

Here is how you can do it



Goal / OKRs



Monthly Goal Check-ins

Regularly checking in on OKRs is essential for keeping progress on track and ensuring alignment with organizational goals. This use case highlights how Teamflect's Goal check-in functionality simplifies the process by allowing users to update their OKRs through Microsoft Teams chat messages or emails. [Learn more.](#)

Steps:

- 1 Teamflect admins initiate monthly OKR check-ins via Microsoft Teams chat or email.
- 2 Participants respond directly to the message, updating their OKRs.
- 3 Updated OKRs are automatically tracked in Teamflect for future reference.
- 4 The team gains a clear understanding of OKR progress and next steps.
- 5 Alignment: Regular check-ins maintain alignment with organizational goals.

Benefits:

- 1 **Easy Updates:** Team members can quickly update their OKRs, reducing administrative work.
- 2 **Real-time Tracking:** Instantly record OKR progress for visibility.
- 3 **Alignment:** Regular check-ins maintain alignment with organizational goals.

Check-in for Jan 5, 2024

You can update the goal progresses using the form below. Don't forget to click the save button after making changes!

15% Increase in Overall Operational Efficiency

End date 03/21/2024

Initial 0

Target 15

Current value

0

Status

No status



Comment

Your comments

Setting a Company Goal

Setting a company-wide goal is a critical step in aligning the entire organization's efforts and direction. This use case focuses on defining and communicating a top-level objective for the entire company. [Learn more.](#)

Steps:

- 1 Company leadership accesses Teamflect's Goal & OKR module.
- 2 They create a new company goal, outlining its purpose, importance, and KPIs.
- 3 The goal is communicated to all employees through a Teamflect notification.
- 4 Progress toward the company goal is tracked and updated regularly.

Benefits:

- 1 **Alignment:** All employees understand the company's overarching objective, fostering alignment and shared purpose.
- 2 **Transparency:** The goal-setting process and progress tracking are transparent, encouraging accountability.
- 3 **Focus:** Company resources and efforts are directed toward achieving the defined goal.

The screenshot shows a 'New goal' form with the following fields and options:

- Owner(s):** A search bar with the placeholder text 'Search for a person...' and an 'Add Myself' button.
- Type:** A row of four buttons: 'Individual goals', 'Self-development goals', 'Department', and 'Company goals'. The 'Company goals' button is highlighted with a blue border.
- Title:** A text input field.
- Description (optional):** A larger text area for a detailed description.
- How will you measure progress?:** A dropdown menu currently set to '% Percent', followed by an 'Initial' field with the value '0' and a 'Target' field with the value '100'.

Tracking/Managing Team Goals

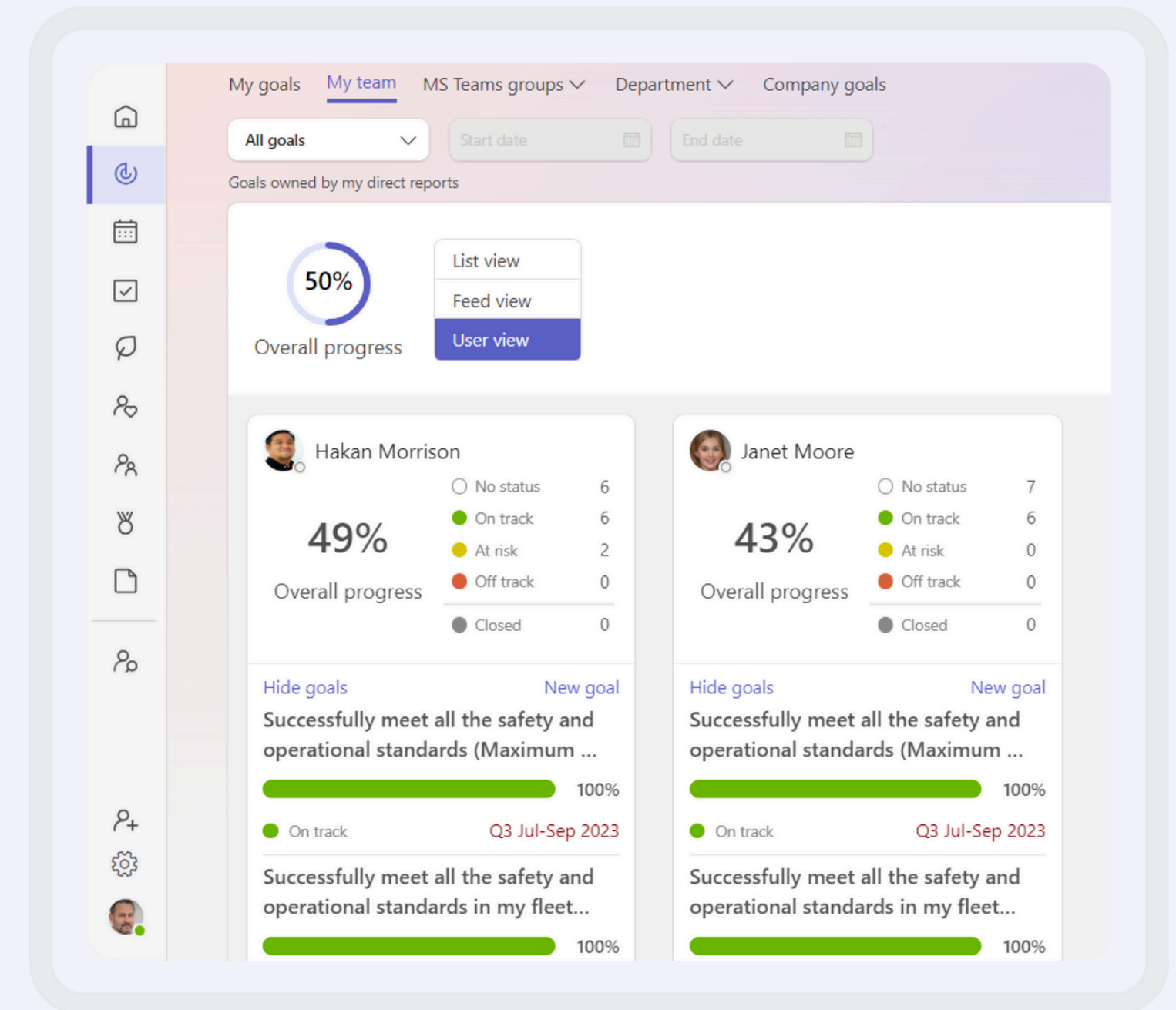
Managing and tracking team-specific goals is essential for departmental success and overall organizational alignment. This use case helps teams set, monitor, and achieve their objectives. [Learn more.](#) [Watch the video.](#)

Steps:

- 1 Team leads or managers utilize Teamflect's Goal & OKR Management module.
- 2 They establish team-specific goals, breaking them into tasks and milestones.
- 3 Progress is regularly updated through goal check-ins within Teamflect.
- 4 Teams collaborate and adjust goals to align with organizational objectives.
- 5 Managers gain visibility into team members' goals through a user view and feed view.

Benefits:

- 1 **Clarity:** Teams gain a precise understanding of their objectives and their impact on the organization.
- 2 **Accountability:** Team members take ownership of their goals and tasks.
- 3 **Adaptability:** Teams can flexibly adapt their goals to changing circumstances and priorities



Setting Departmental Goals

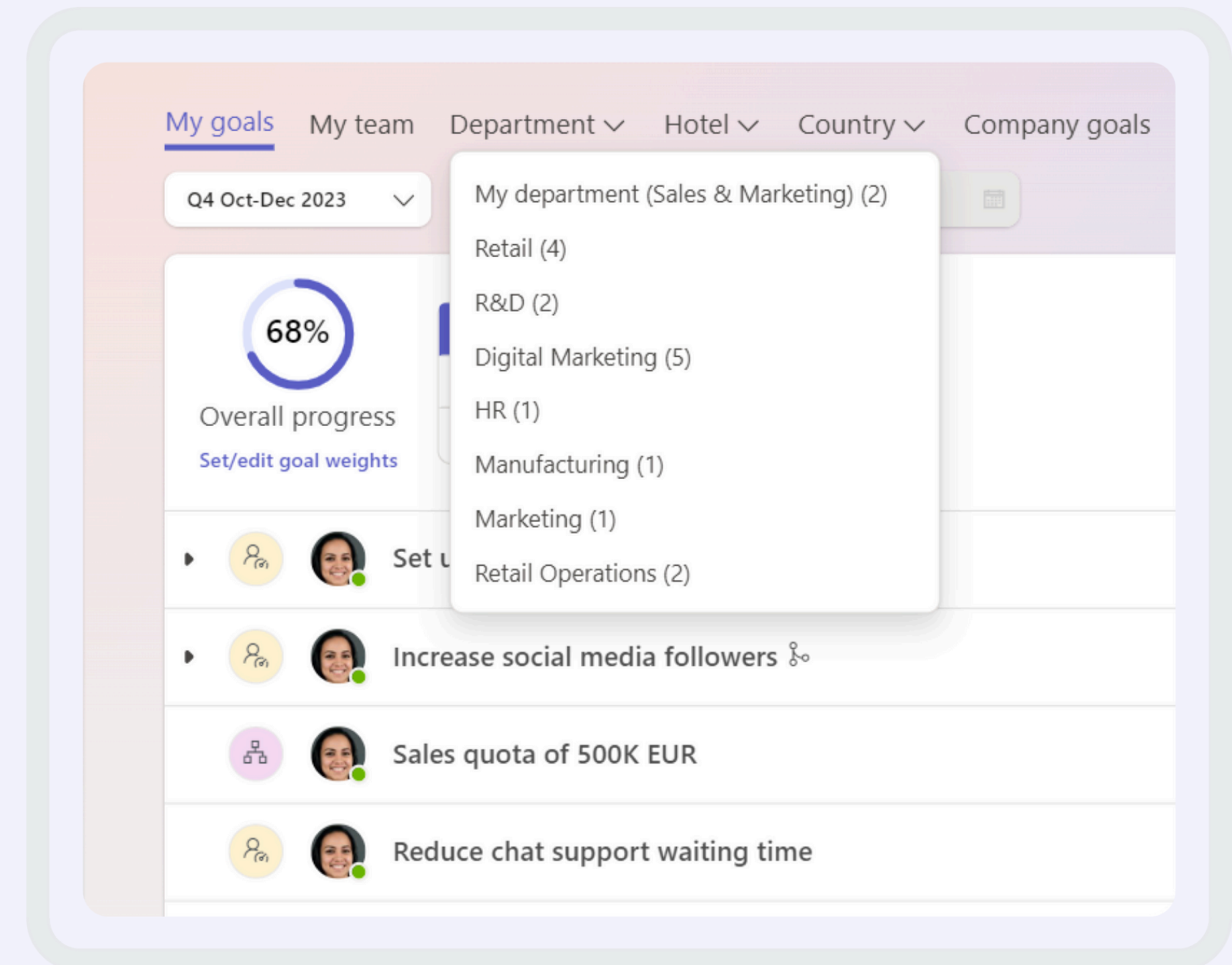
Setting department-specific goals is essential for achieving organizational objectives. This use case helps department heads define and communicate their goals. [Learn more.](#)

Steps:

- 1 Department leaders access Teamflect's Goal & OKR Management module
- 2 They create department goals that align with company objectives.
- 3 The goals are communicated to department members through Teamflect
- 4 Progress is tracked, and departmental achievements are celebrated.

Benefits:

- 1 **Focus:** Departments are clear on their specific contributions to the organization's success.
- 2 **Alignment:** Department goals are aligned with company goals, ensuring unity of purpose.
- 3 **Efficiency:** Resources are directed toward achieving departmental objectives effectively.



Setting Self Development Goals

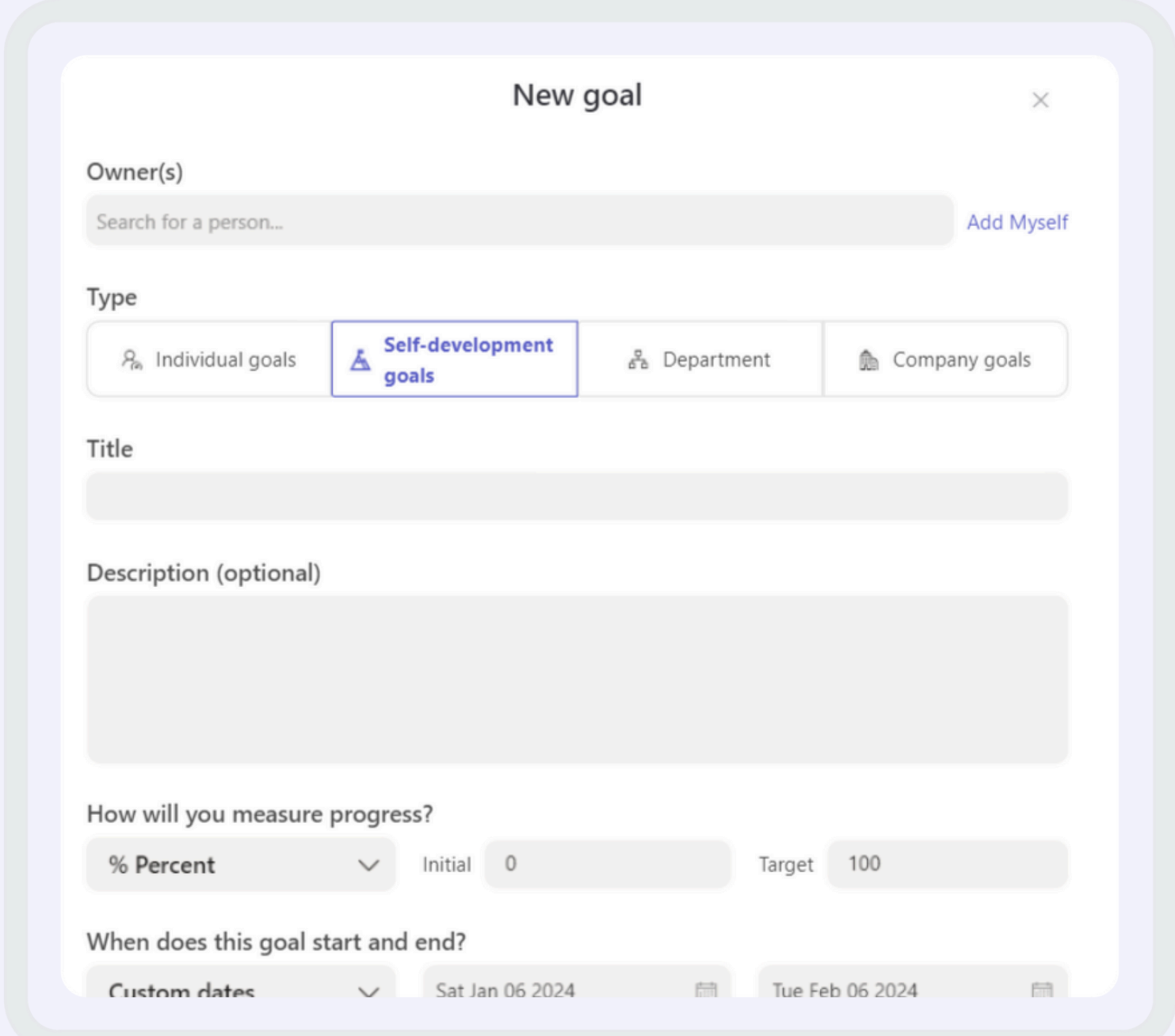
Individuals, including both employees and managers, often have unique growth and development aspirations. This use case empowers all users to set and track personal development objectives, fostering growth across the organization. [Learn more.](#)

Steps:

- 1 Employees and managers access Teamflect's Goal & OKR module.
- 2 They set self-development goals related to skills, career advancement, or personal growth.
- 3 Progress is monitored and updated within Teamflect, allowing employees to track their journey.

Benefits:

- 1 **Ownership:** Employees take ownership of their professional development.
- 2 **Growth:** Personalized goals help individuals advance their skills and careers
- 3 **Motivation:** Progress tracking and achievements boost motivation and satisfaction.



The screenshot displays the 'New goal' form with the following fields and options:

- Owner(s):** Search for a person... Add Myself
- Type:** Individual goals, **Self-development goals** (selected), Department, Company goals
- Title:** [Empty text field]
- Description (optional):** [Empty text area]
- How will you measure progress?:** % Percent (selected), Initial 0, Target 100
- When does this goal start and end?:** Custom dates (selected), Sat Jan 06 2024, Tue Feb 06 2024

Assign Goals to Microsoft Teams teams

Group goals involve multiple team members collaborating to achieve a common objective. This use case highlights the importance of setting and managing group goals. [Learn more.](#)

Steps:

- 1 Team leaders create group goals within Teamflect's Goal & OKR module.
- 2 Team members are assigned specific tasks and responsibilities within the group goal.
- 3 Collaboration and communication are facilitated within Teamflect to ensure successful goal attainment.

Benefits:

- 1 **Ownership:** Employees take ownership of their professional development.
- 2 **Growth:** Personalized goals help individuals advance their skills and careers
- 3 **Motivation:** Progress tracking and achievements boost motivation and satisfaction.

The screenshot displays a goal management interface for a user named Miriam Graham. The goal is titled "Create 3 customer references in FY23" and is shown as 100% complete. The progress bar is green, and the text "Goal progress is calculated by related tasks" is visible. The status is "On Track" (indicated by a green dot). A "Close goal" button is present. Below the goal, there are sections for "Subgoals" (with an "Add new" button) and "Comments (0) Progress updates (3)". A rich text editor is visible at the bottom. On the right side, a sidebar shows the goal's details: "Created" on April 14, 2023, "Start date" as "Start of FY Jan-Dec 2023", "End date" as "End of FY Jan-Dec 2023", and "Last progress update" on January 6, 2024, at 12:56 AM. The visibility is set to "Public". A red box highlights the "Related groups (optional)" dropdown menu, which currently shows "Contoso Retail...". There are also "Labels" (with an "Add" button) and a "Parent goal" section (with a "Remove" button).

Meetings



Monthly Team Check-In Meeting

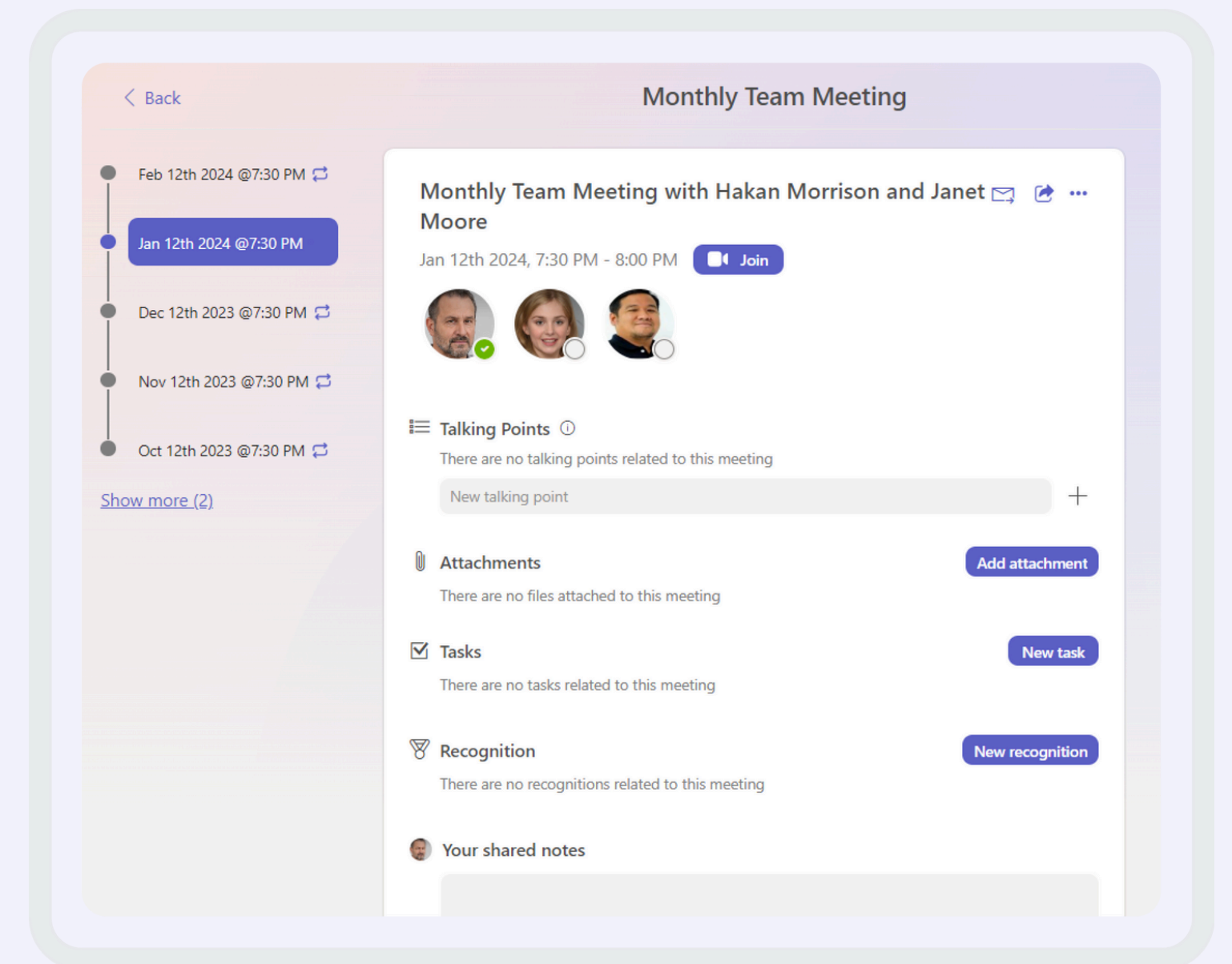
Monthly team check-in meetings are essential for teams to review progress, align on goals, discuss challenges, and plan for the month ahead. These meetings enhance collaboration and accountability within the team. [Learn more.](#)

Steps:

- 1 Schedule the meeting in Teamflect, inviting team members.
- 2 Create an agenda with talking points, goals, and action items.
- 3 During the meeting, access Teamflect's integrated features for real-time collaboration.
- 4 Share notes, attachments, and resources.
- 5 Track task/goal progress during meetings with Teamflect's meeting integration.
- 6 Summarize key takeaways and assign follow-up tasks in the meeting notes.

Benefits:

- 1 **Alignment:** Team members stay aligned with goals and priorities.
- 2 **Efficiency:** Collaborative meeting tools enhance productivity.
- 3 **Accountability:** Meeting notes and action items ensure accountability.



Manager-Employee 1-on-1 Meeting

Manager-employee 1-on-1 meetings are essential for building strong relationships, providing feedback, and setting clear objectives. Teamflect offers a dedicated space for these interactions. [Learn more](#) [Watch the video](#)

Steps:

- 1 Schedule recurring 1-on-1 meetings in Teamflect for consistent communication.
- 2 Create a personalized agenda with talking points, feedback, and development goals.
- 3 Use Teamflect's resources to facilitate coaching and skill development
- 4 Share private notes and feedback securely within Teamflect.
- 5 Integrate Teamflect into Teams meetings for a seamless experience.
- 6 Summarize key discussions and action items in Teamflect's meeting notes

Benefits:

- 1 **Employee Development:** Managers and employees collaborate on growth plans.
- 2 **Trust Building:** Shared notes and feedback promote open dialogue.
- 3 **Seamless Integration:** Teamflect enhances the Teams meeting experience

The screenshot displays the Teamflect interface for a 1-on-1 meeting with Janet Moore. The interface is organized into several sections:

- Header:** "1-on-1's with Janet Moore" with a "New 1-on-1" button.
- Meeting History:** A vertical timeline on the left shows previous meetings: Jan 8th 2024 @2:00 PM, Jan 5th 2024 @2:00 PM, Jan 2nd 2024 @2:00 PM, Jan 1st 2024 @2:00 PM, and Dec 29th 2023 @2:00 PM. A "Show more 6" link is present.
- Meeting Details:** The main area shows the current meeting: "Daily 1-on-1 with Janet Moore" on Jan 8th 2024, 2:00 PM - 2:30 PM, with a "Join" button.
- Talking Points:** A section titled "Talking Points" with a sub-header "There are no talking points related to this meeting" and a "New talking point" input field.
- Attachments:** A section titled "Attachments" with a sub-header "There are no files attached to this meeting" and an "Add attachment" button.
- Tasks:** A section titled "Tasks" with a sub-header "There are no tasks related to this meeting" and a "New task" button.
- Feedback:** A section titled "Feedback" with a sub-header "There are no feedback related to this meeting" and a "New feedback" button.
- Recognition:** A section titled "Recognition" with a sub-header "There are no recognitions related to this meeting" and a "New recognition" button.
- Engagement Level:** A section titled "Engagement level of Janet Moore" with a dropdown menu currently set to "Not selected".
- Tips & Resources:** A section on the left provides tips: "Regular 1-on-1 meeting", "Be present and listen actively", "Try to learn about the expectations from you for the upcoming period", "Provide feedback and don't forget to talk about what is going well", and "Plan for the next meeting if not already planned". It also includes a link: "How to give feedback people can actually use".
- Talking point suggestions:** A section on the right lists suggestions: "Upcoming Milestones and Action Plan", "Team Engagement and Feedback on New Initiatives", "Discuss the current status of the ongoing green fleet strategies", "Progress and Future Strategies", and "Efficiency and Cost-saving Measures".
- Janet's Goals:** A section on the right shows "Active goals" with a progress indicator of 12%. A legend indicates: No status (7), On track (1), At risk (0), Off track (0), and Closed (0). It includes "Show goals" and "New goal" buttons.
- Tasks:** A section on the right shows "Tasks" with a dropdown menu set to "Since last 1-on-1".

Project Review Meeting

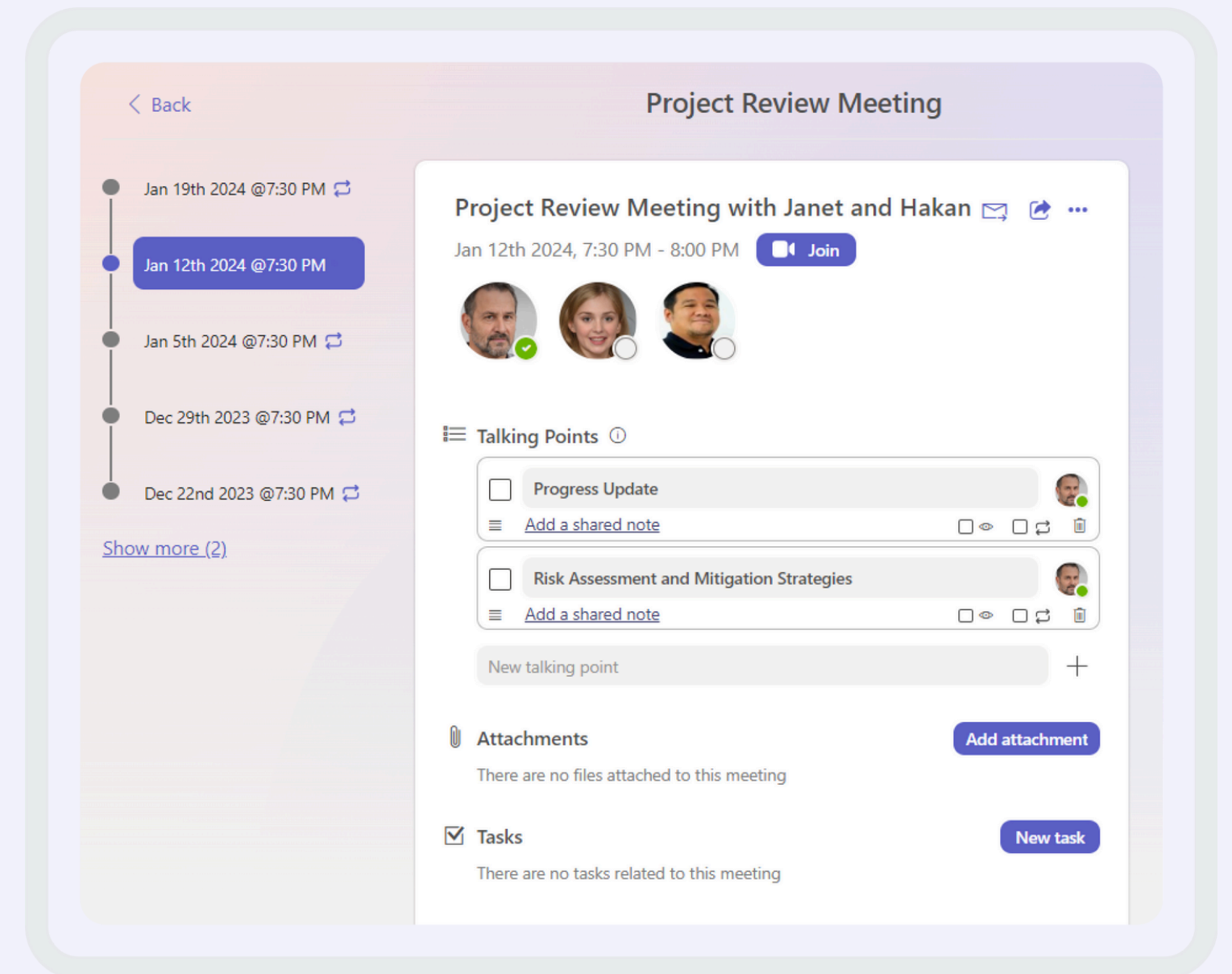
Project review meetings assess project progress, outcomes, and improvements. Teamflect simplifies these meetings with collaborative features and shared resources. [Learn more.](#)

Steps:

- 1 Schedule a project review meeting in Teamflect, inviting stakeholders.
- 2 Create an agenda with project objectives, challenges, and success stories.
- 3 Utilize Teamflect's collaborative tools for real-time discussions.
- 4 Share project-related documents, reports, and resources.
- 5 Integrate Teamflect into Teams meetings for efficient collaboration.
- 6 Document meeting insights and action items in Teamflect's notes.

Benefits:

- 1 **Continuous Improvement:** Lessons learned lead to better project outcomes
- 2 **Resource Sharing:** Teamflect facilitates resource sharing and document access.
- 3 **Enhanced Collaboration:** Integration with Teams streamlines teamwork.



Performance Review Discussion Meeting

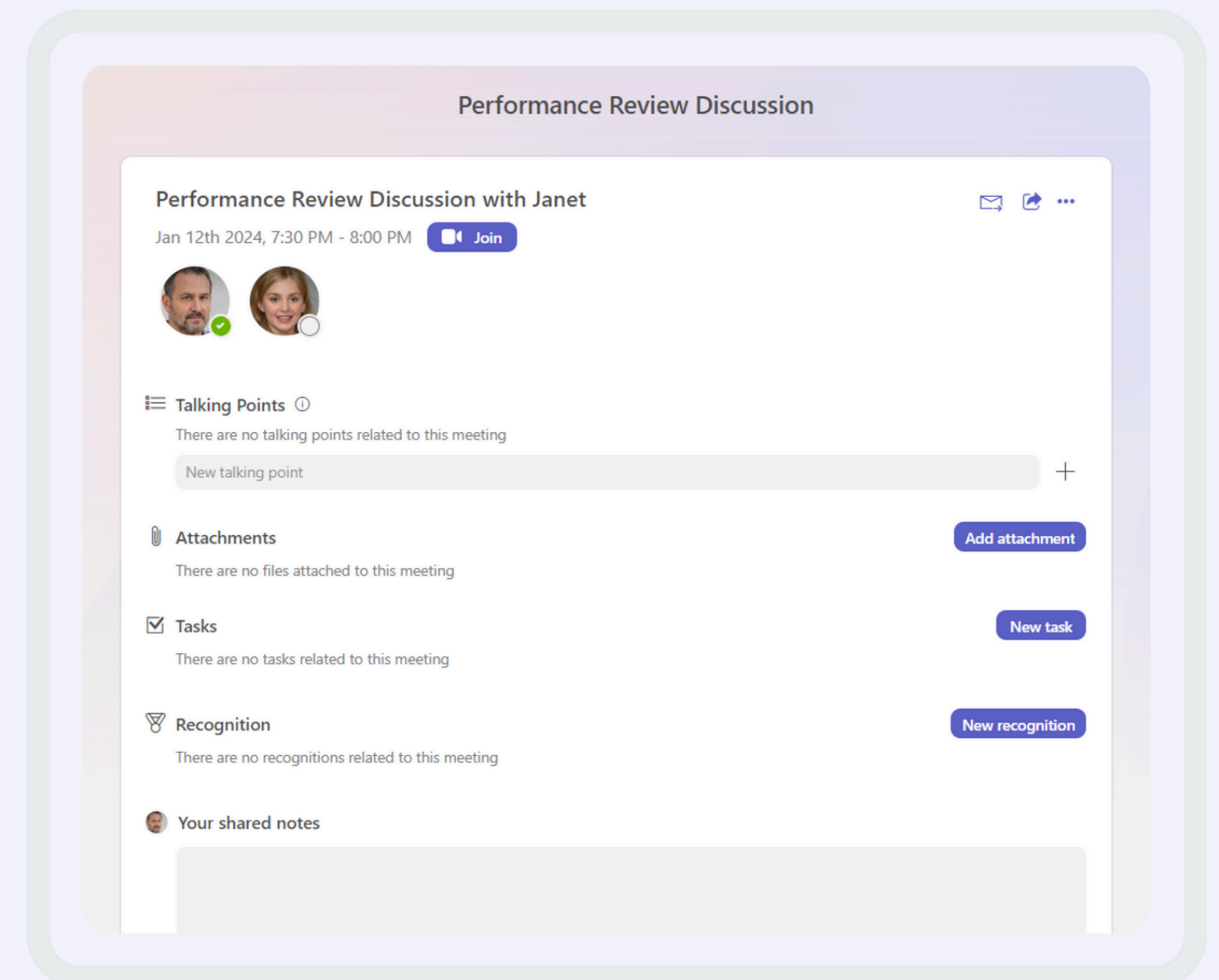
Conducting effective performance review meetings is vital for employee growth and organizational success. This use case streamlines the process by providing a structured framework for performance discussions and easy scheduling within Teamflect. [Learn more.](#)

Steps:

- 1 Managers or HR professionals initiate performance review discussion meetings through Teamflect's interface.
- 2 Invitations to the meeting are sent to the relevant employees, along with any pre-meeting tasks or documentation requirements.
- 3 During the meeting, managers can present the last performance review in the meeting with the Teamflect meeting extension., ensuring that all critical performance areas are covered.
- 4 Meeting notes, feedback, and action items are documented within Teamflect for reference and future improvement.

Benefits:

- 1 **Structure:** Teamflect provides a structured framework for performance discussions, making the process more organized and comprehensive.
- 2 **Efficiency:** Automated invitations and documentation streamline the review process, saving time for both managers and employees.
- 3 **Continuous Improvement:** Stored meeting data allows for the tracking of employee development over time, facilitating ongoing improvement.



Employee Development Program Meeting

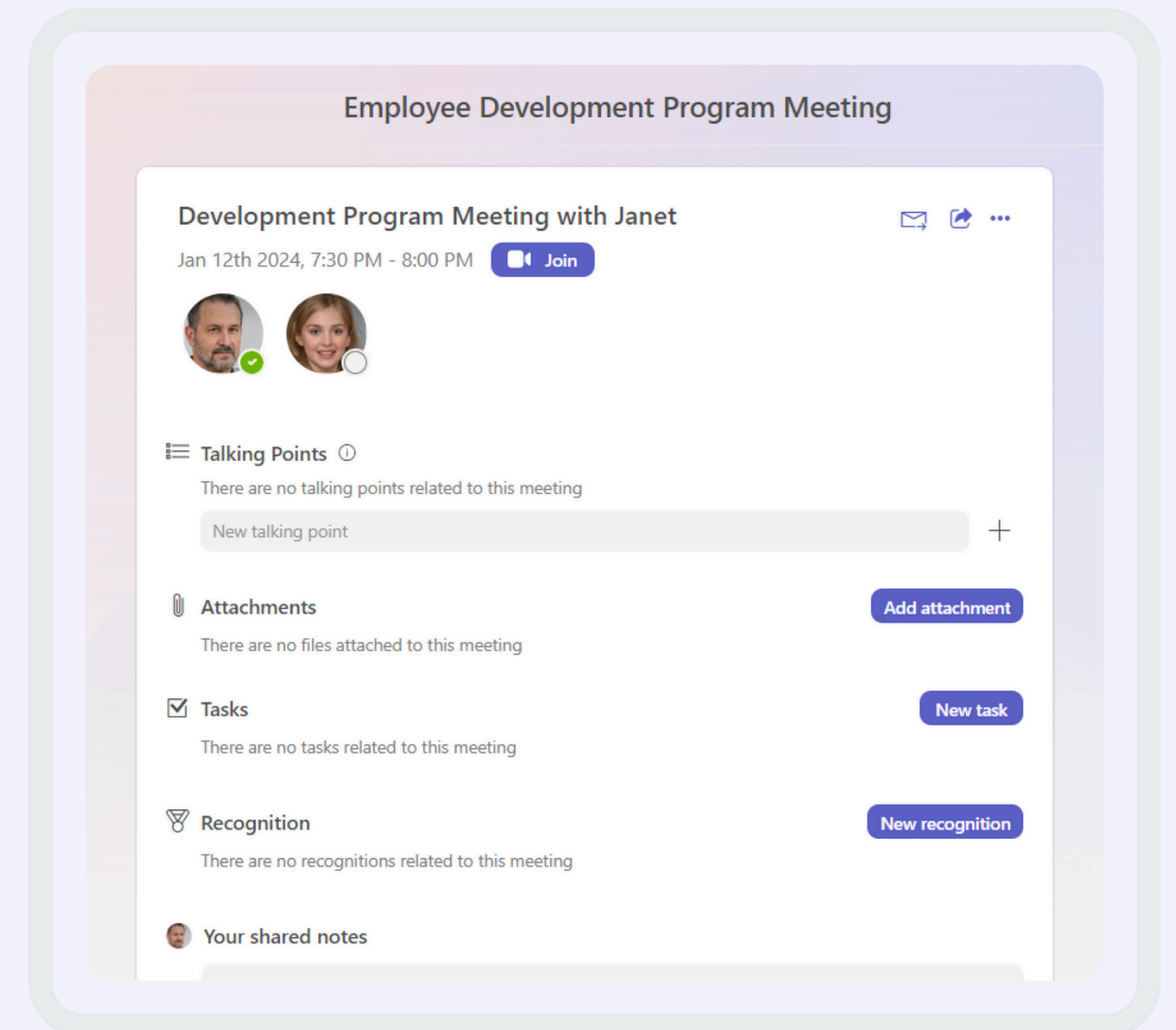
Employee development program meetings focus on participants' growth and program effectiveness. Teamflect enhances these meetings with collaborative features and tracking capabilities. [Learn more.](#)

Steps:

- 1 Schedule program meetings in Teamflect to track participant progress.
- 2 Create a program agenda with goals, milestones, and feedback sessions.
- 3 Use Teamflect's resources to support skill development and training.
- 4 Share program-related materials, guides, and assessments.
- 5 Integrate Teamflect into Teams meetings for a cohesive experience.
- 6 Document meeting insights and program adjustments in Teamflect's notes.

Benefits:

- 1 **Program Effectiveness:** Meetings ensure program alignment with goals.
- 2 **Participant Engagement:** Collaborative tools foster participant engagement.
- 3 **Enhanced Tracking:** Teamflect's integration with Teams streamlines tracking.



Mentorship Program Meeting

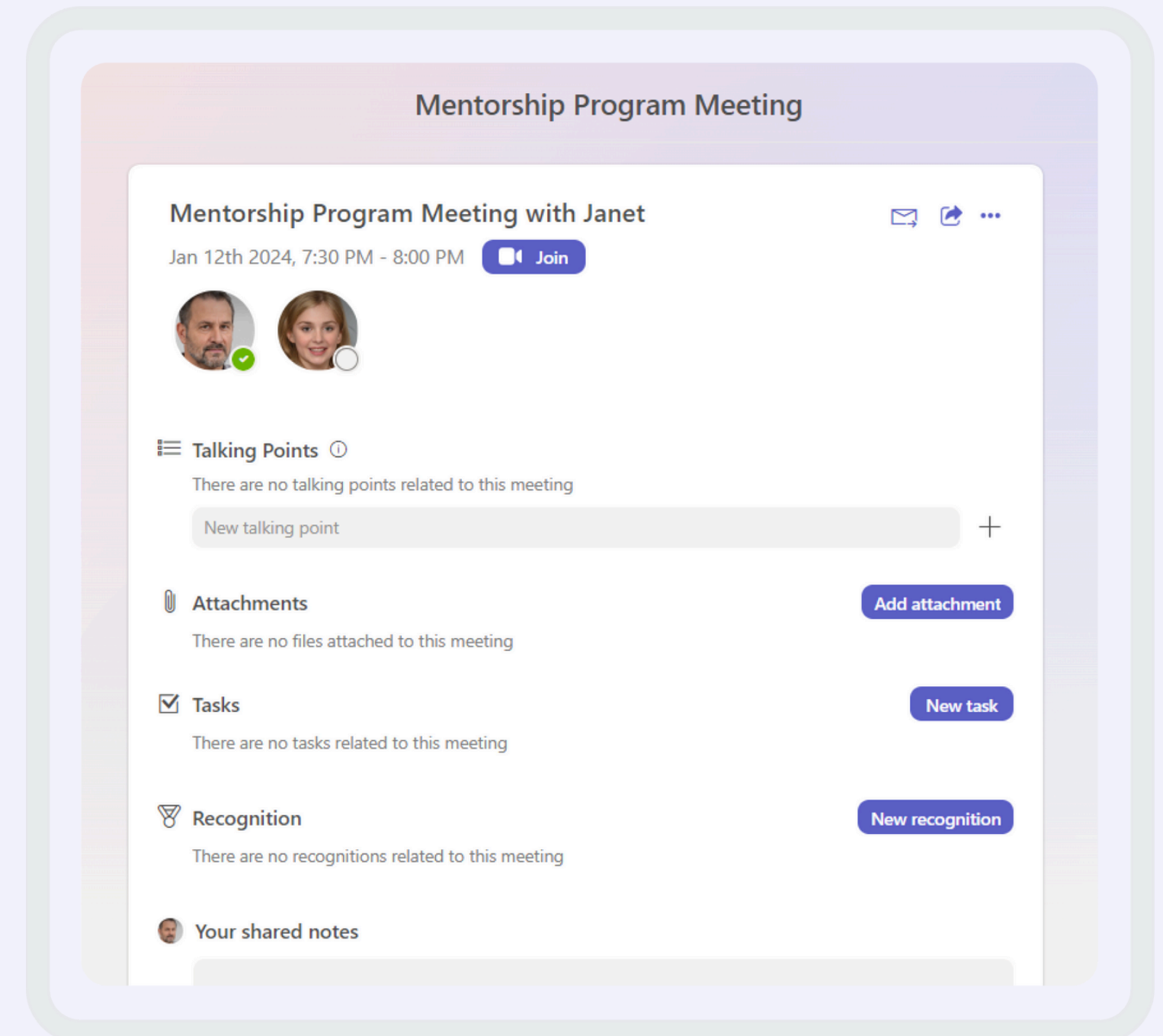
Mentorship program meetings are essential for mentors and mentees to connect, share experiences, set goals, and track progress in a mentorship relationship. [Learn more.](#)

Steps:

- 1 Mentors and mentees schedule mentorship program meetings within Teamflect.
- 2 Meetings are held at regular intervals (e.g., monthly).
- 3 Participants discuss career goals, challenges, and successes.
- 4 Mentors provide guidance and support to mentees.
- 5 Goals and action plans for growth are established.
- 6 By sending the meeting summary, the notes and goals created during the meeting are documented for future reference.

Benefits:

- 1 **Guidance:** Mentees receive valuable guidance and insights from experienced mentors.
- 2 **Goal Achievement:** Clear goals and action plans enhance career development.
- 3 **Relationship Building:** Mentorship relationships are strengthened through regular meetings.



Reviews



Annual Performance Review Cycle

Annual performance reviews are comprehensive assessments of employee performance, typically conducted once a year. Teamflect simplifies this process with customizable templates and integrated collaboration tools. [Learn more.](#)

Steps:

- 1 Customize performance review templates to align with organizational goals and annual objectives.
- 2 Schedule annual performance reviews in Teamflect, ensuring all participants are invited.
- 3 Complete the entire performance review cycle within Teamflect's integrated solution.
- 4 Use the self-development plan section to establish personal improvement plans. Additionally, utilize the 360-degree feedback to gather comprehensive feedback on the employee's performance from multiple perspectives.

Benefits:

- 1 **Holistic Assessment:** Annual reviews provide a comprehensive view of employee performance over the course of a year.
- 2 **Customization:** Templates can be adapted to address specific job roles, objectives, and annual milestones.
- 3 **Efficient Collaboration:** Teamflect's collaborative features enhance the review process, promoting meaningful feedback and goal-setting.

The screenshot displays the '2024 Annual Performance Review Cycle' interface for Hakan Morrison, a Fleet Manager. The reviewer is Benny Matteo, with a review period from Oct 1st 2024 to Dec 31st 2024. Key dates include a self-review due on Dec 11th 2024, a review due on Dec 25th 2024, and a finalize due on Jan 1st 2024. The progress bar indicates 'Waiting for self-review' with a green dot and three empty circles. Below, the 'Goals in this review period' section shows two goals: 'Increase SM followers' (70% on track, Q4 Oct-Dec 2024) and 'Complete 9 assessments' (67% on track, Q4 Oct-Dec 2024). For each goal, Hakan's rating is 'Not rated yet' and Benny's rating is 'Waiting for self-review'.

Quarterly Performance Review Cycle

Quarterly performance review cycles offer organizations the opportunity to assess employee performance, provide feedback, and set goals on a regular basis. Teamflect streamlines these reviews with customizable templates. [Learn more.](#)

Steps:

- 1 Customize performance review templates to align with organizational goals.
- 2 Schedule quarterly performance review cycles in Teamflect.
- 3 Complete entire performance review cycles inside Microsoft Teams with our integrated solution.
- 4 Share performance feedback and set goals in the self-development plan section.

Benefits:

- 1 **Regular Feedback:** Quarterly reviews ensure ongoing feedback and improvement.
- 2 **Customization:** Templates can be tailored to reflect specific job roles and objectives.
- 3 **Collaboration:** Teamflect's collaborative features enhance the review process.

The screenshot displays a performance review interface for Hakan Morrison, a Fleet Manager. The interface is set against a dark blue header with the reviewer's name, Benny Matteo, and the review period: Oct 1st 2024 - Mar 31st 2024. Key dates include a self-review due date of Dec 11th 2024, a review due date of Dec 25th 2024, and a finalize due date of Jan 1st 2024. A progress indicator shows the review is 'Waiting for self-review' with a green dot and three empty circles.

The main section is titled 'Goals in this review period' and shows an overall progress of 69%. Below this, two goals are listed:

- Goal 1:** 'Increase SM followers' with a progress bar at 70% and status 'On track' for Q4 Oct-Mar 2024. Hakan's rating is 'Not rated yet' and Benny's rating is 'Waiting for self-review'.
- Goal 2:** 'Complete 9 assessments' with a progress bar at 67% and status 'On track' for Q4 Oct-Mar 2024. Hakan's rating is 'Not rated yet' and Benny's rating is 'Waiting for self-review'.

Monthly Goal Review Process

This use case simplifies the process by automating the monthly goal review, allowing employees to provide input, and facilitating productive meetings with their managers.

Steps:

- 1 Teamflect automatically triggers a monthly goal review, notifying employees and managers of the upcoming evaluation.
- 2 Employees receive the review form and provide feedback on their goal progress, challenges, and accomplishments within Teamflect.
- 3 Following the employee's input, a meeting is scheduled with the manager to discuss the goals and provide guidance.
- 4 During the meeting, the manager and employee review the input, assess goal achievement, and set next steps.

Benefits:

- 1 **Consistency:** Regular monthly reviews ensure consistent tracking of goal progress and alignment with organizational objectives.
- 2 **Efficiency:** Automated notifications and forms streamline the review process, saving time for both employees and managers.
- 3 **Productivity:** The structured process of the review meeting allows for effective discussions, feedback, and goal adjustments.

The screenshot displays the 'Monthly Goal Review' dashboard. At the top, there is a summary section with a '100%' completion rate and a list of review statuses: 0 Waiting for self-review, 0 Waiting for reviewer, 0 Waiting to be finalized, and 2 Finalized. Below this is a table of review results:

Reviewee	Status	Deadline for next action	Overall score	9-box	Action
Hakan Morrison	Finalized	-	2.88	High Potentials	See review
Janet Moore	Finalized	-	3.75	Core Players	See review

Below the table, there are two 'Performance Review' cards. The first card shows a 0% completion rate with 2 reviews 'Waiting for self-review', 0 'Waiting for reviewer', 0 'Waiting to be finalized', and 0 'Finalized'. The second card shows a 0% completion rate with 1 'Waiting for self-review' and 0 'Waiting for reviewer'.

Project Closure Review

Project closure reviews are conducted after project completion to evaluate outcomes, identify lessons learned, and improve future projects. Teamflect simplifies these reviews with customizable templates and integrated collaboration tools. [Learn more.](#)

Steps:

- 1 Customize review templates to align with project objectives, successes, challenges, and improvements.
- 2 Schedule project closure reviews in Teamflect, ensuring all team members are invited.
- 3 Complete the entire project closure review cycle within Teamflect's integrated solution.
- 4 Share project documents, reports, and resources for reference.
- 5 Document insights, lessons learned, and action items.

Benefits:

- 1 **Continuous Improvement:** Project closure reviews inform future project planning and execution.
- 2 **Resource Sharing:** Teamflect facilitates resource access and sharing among project stakeholders.
- 3 **Effective Collaboration:** Teamflect enhances collaboration, ensuring all stakeholders contribute to the review process.

The screenshot displays a user interface for a project closure review. At the top, a dark blue header bar contains the reviewer's profile: a circular profile picture of Adele Vance, her name 'Adele Vance', and her role 'Retail Manager'. To the right of the profile, the review details are listed: 'Reviewer: Miriam Graham', 'Reviewer Period: Jul 1st 2023 - Sep 30th 2023', 'Self-review due: Aug 21st 2023', 'Review due: Sep 4th 2023', and 'Finalize due: Sep 11th 2023'. Below the header, the review title 'XYZ Project Completion Review' is shown, followed by a progress indicator 'Waiting for self-review' with a green dot and three grey circles. The main content area is divided into two sections. The first section is titled '360-degree Feedback for Adele Vance' and includes an example instruction: 'Ex: Please request feedback from the people that you have worked closely in this review period'. It features a search bar labeled 'Search for a person...' and a 'Send feedback request' button. Below the search bar, it states 'Feedback results and providers are visible to the reviewee' and 'No feedback requested yet'. The second section is titled 'Objectives' and contains the text 'This section is for evaluating the objectives of this project'. It includes a question: 'How would you rate yourself in achieving objectives of this project?' and two answer slots: 'Adele's answer' and 'Miriam's answer', each with a horizontal progress bar.

Mentorship Program Review

Mentorship program reviews are conducted to assess the effectiveness of mentorship initiatives, gather feedback from program participants, and enhance the mentorship experience. Teamflect simplifies these reviews with customizable templates and integrated tools.

Steps:

- 1 Customize review templates to align with mentorship program objectives, feedback collection, and areas for improvement.
- 2 Schedule mentorship program reviews in Teamflect, ensuring all program participants, mentors, and mentees are invited.
- 3 Complete the entire review cycle within Teamflect's integrated solution.
- 4 Share mentorship program materials, guides, and assessments for reference.
- 5 Document insights, feedback, and suggested program enhancements.

Benefits:

- 1 **Program Enhancement:** Mentorship program reviews lead to program improvements and alignment with organizational goals.
- 2 **Participant Feedback:** Teamflect collects valuable feedback from program participants, mentors, and mentees.
- 3 **Resource Sharing:** Program-related materials can be easily shared and accessed through Teamflect.

The screenshot displays a user interface for a 'Mentorship Program Review'. At the top, a dark blue header bar contains the profile of 'Adele Vance', a Retail Manager, and a summary of review dates: 'Reviewer: Miriam Graham', 'Reviewer Period: Dec 6th 2023 - Jan 6th 2024', 'Self-review due: Jan 20th 2024', 'Review due: Feb 3rd 2024', and 'Finalize due: Feb 10th 2024'. Below the header, the main content area is titled 'Mentorship Program Review' and includes a progress indicator showing 'Waiting for self-review' with a green dot and three grey circles. A descriptive text states: 'Mentoring program managers should make a point of reviewing these metrics monthly or bi-monthly to stay up-to-date on each mentorship and the program as a whole.' The lower section, titled 'Mentorship Program Review Questions', contains three questions with response boxes for 'Adele's answer' and 'Miriam's answer'. The first question is 'Did the mentor program run as you planned?', the second is 'What do you enjoy about the program?', and the third is 'What about the program do you not enjoy?'. Each question has a corresponding 'Not answered yet' or 'Waiting for self-review' button.

Onboarding Process Review

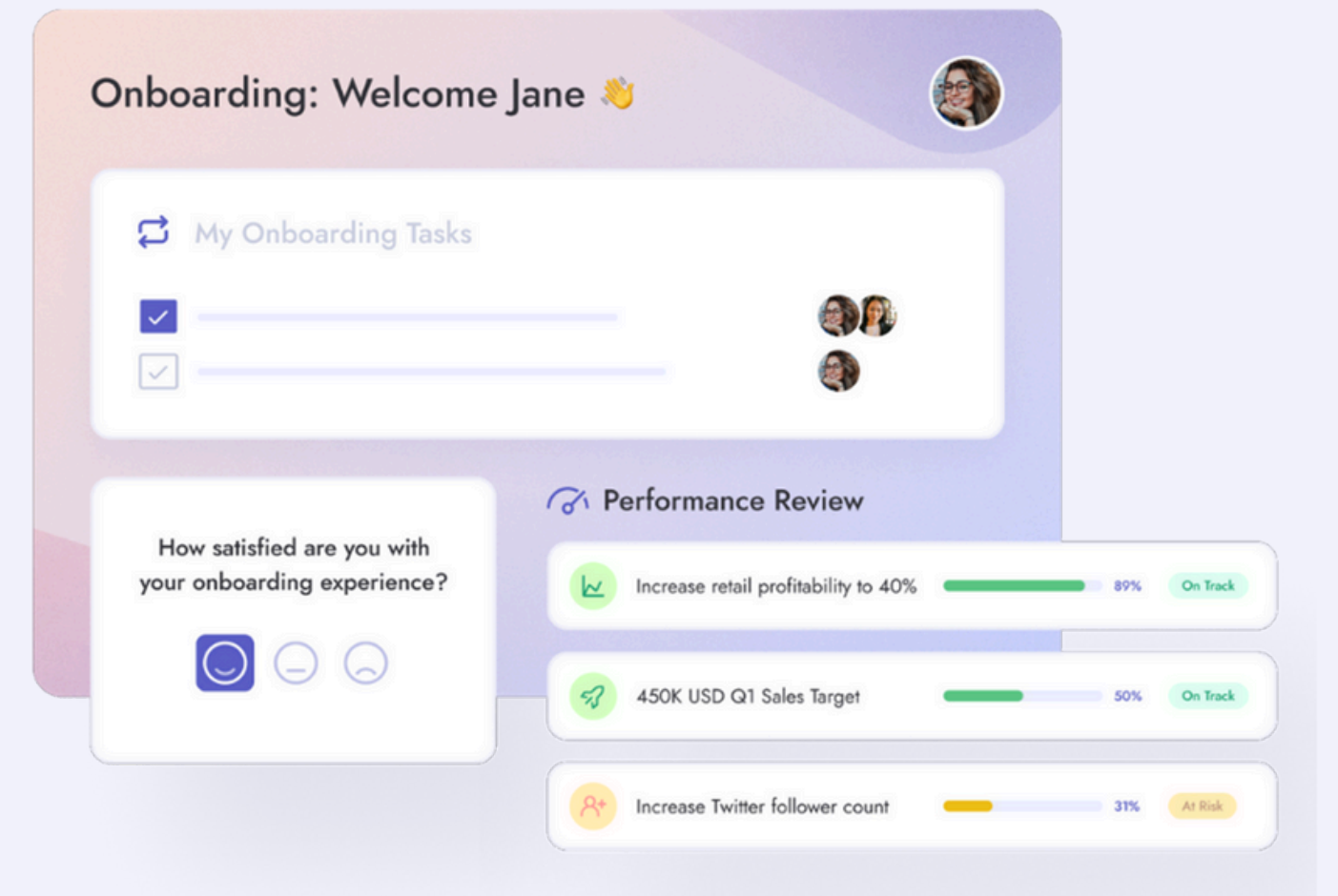
The onboarding process review is conducted to evaluate the effectiveness of employee onboarding, identify areas for improvement, and enhance the onboarding experience. Teamflect simplifies these reviews with customizable templates.

Steps:

- 1 Customize review templates to align with onboarding objectives, milestones, challenges, and potential improvements.
- 2 Schedule onboarding reviews in Teamflect, ensuring all relevant team members and the new hire are invited.
- 3 Complete the entire onboarding review cycle within Teamflect's integrated solution.
- 4 Understand what the onboarding process is like for the employee.

Benefits:

- 1 **Enhanced Onboarding:** Onboarding reviews lead to improvements in the onboarding process, ensuring a smoother transition for new hires.
- 2 **Timely Feedback:** 30-60-90 day reviews provide timely feedback at critical stages of the onboarding journey.



Leveraging 9-Box Evaluations

Teamflect introduces the powerful 9-Box Evaluation tool, allowing organizations to comprehensively assess an individual's performance and potential through a two-dimensional matrix.

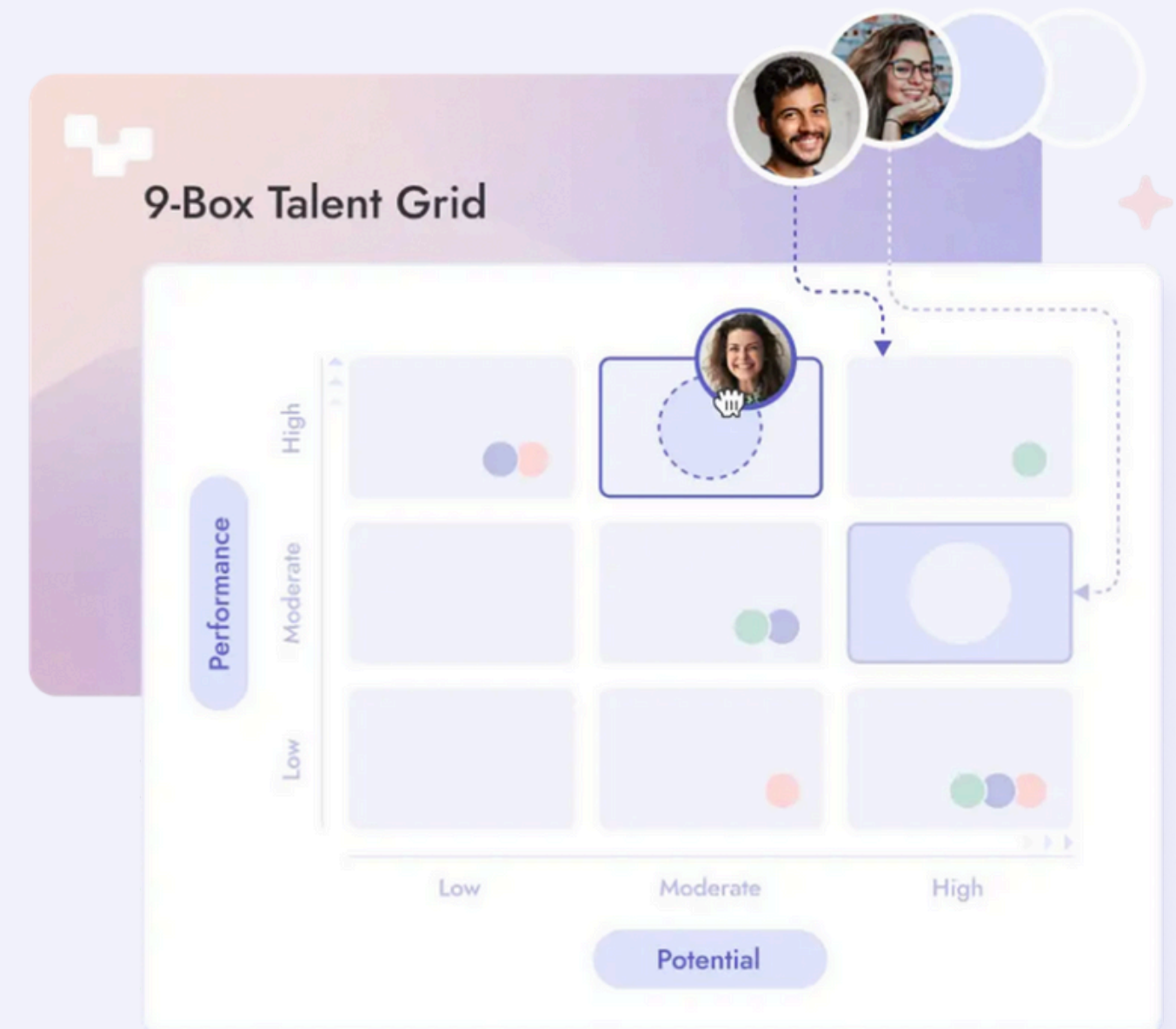
[Learn more.](#) [Watch the video.](#)

Steps:

- 1 Navigate the user profiles of employees and find the 9-Box grid results, which are derived from their completed performance reviews. It illustrates an individual's current performance and potential.
- 2 Analyze the position of each employee within the 9-Box grid, taking into account their performance ratings and potential scores. This helps in identifying high-performing individuals, emerging talent, and areas for development.
- 3 Design mentorship and coaching programs that cater to the specific needs of each employee. High-potential employees can be guided towards leadership development, while those in need of improvement can receive targeted coaching.

Benefits:

- 1 **Objective Evaluation:** The 9-Box Evaluation provides an objective assessment of an employee's performance and potential.
- 2 **Tailored Development:** Custom mentorship and coaching programs aid employees in reaching their full potential.



Feedback



360° Feedback for Leadership Development

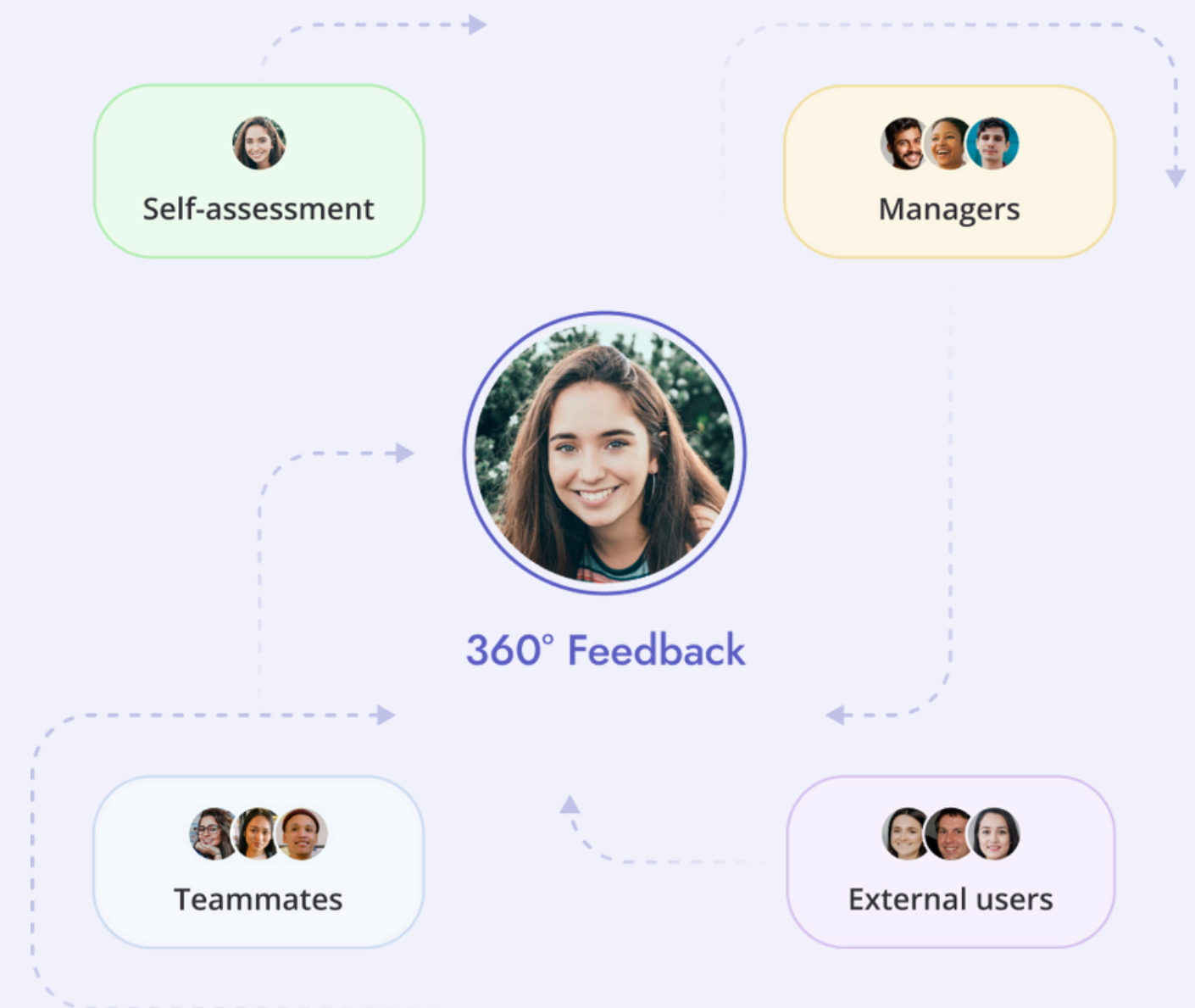
360-degree feedback is a comprehensive approach to gathering feedback from various sources, allowing leaders to develop their skills and effectiveness. [Learn more.](#)

Steps:

- 1 Determine the specific areas and skills you want feedback on.
- 2 Choose feedback providers from various levels within the organization
- 3 Initiate the feedback process by sending requests to participants through Teamflect.
- 4 Gather feedback anonymously from all participants to maintain objectivity.
- 5 Analyze the feedback to identify strengths, weaknesses, and areas for improvement.
- 6 Use the feedback to establish a personalized leadership development plan.

Benefits:

- 1 **Holistic View:** Obtain a well-rounded perspective on a leader's performance.
- 2 **Personalized Development:** Tailor leadership development plans based on feedback.
- 3 **Improved Leadership:** Encourage leaders to enhance their skills and become more effective.



Anonymous Feedback for Continuous Improvement

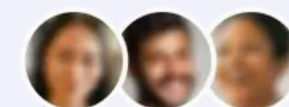
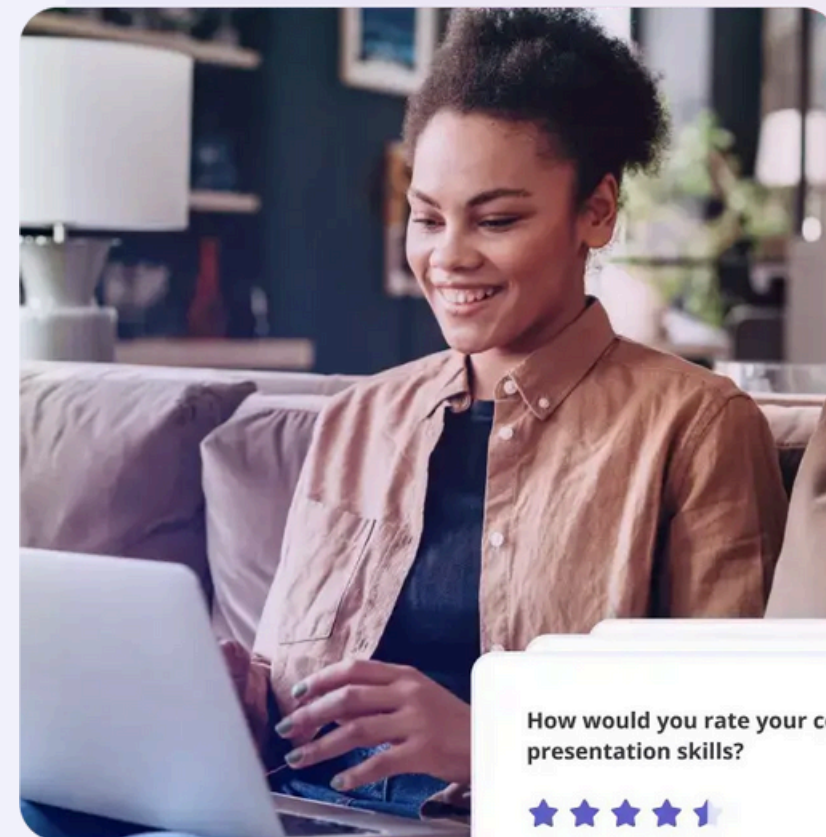
Anonymous feedback lets employees share their ideas and suggestions for making things better at work without revealing their names. Teamflect lets users toggle the anonymity of feedback. [Learn more.](#)

Steps:

- 1 Managers can send out anonymous feedback requests through Teamflect.
- 2 This helps build a workplace where everyone feels comfortable sharing their thoughts, whether they want to be anonymous or not.
- 3 Use Teamflect to collect the feedback, look for common ideas, and find areas where things could be improved.
- 4 Analyze the feedback you received to make changes that will help the organization grow and improve.

Benefits:

- 1 **Honest Thoughts:** With anonymous feedback, employees can speak their minds without worrying about getting in trouble.
- 2 **Keep Getting Better:** Acting on feedback helps the organization get better and better over time.
- 3 **Positive Workplace:** Encouraging open communication, whether it's anonymous or not, makes for a happier and more productive workplace.



How would you rate your colleagues' presentation skills?



How can he/she improve their presentation skills?

You speak clearly and maintain audience attention with eye contact, gestures, and voice inflections. However, I feel like...



Performance Improvement Plan Feedback

In situations where employees are part of a Performance Improvement Plan (PIP), consistent and constructive feedback is essential for their development. This use case outlines a structured process that enables managers to provide weekly or bi-weekly feedback to employees in a PIP.

Steps:


- 1 Teamflect provides a customizable format for PIP feedback that includes a review of areas requiring improvement, progress made, and actionable steps for the employee.
- 2 Prior to each scheduled feedback session, managers can submit feedback using the established format.
- 3 During the meeting, the manager and the employee discuss the feedback, address any concerns, and set clear objectives for the upcoming period.
- 4 Teamflect stores feedback records, allowing both the manager and the employee to track progress over time.

Benefits:

- 1 **Consistency:** Regular feedback sessions maintain a clear focus on improvement and keep the employee on track with their PIP.
- 2 **Transparency:** The feedback history is accessible to both the manager and the employee, fostering transparency in the PIP process.
- 3 **Development:** Constructive feedback and goal setting enable employees to work on their areas of improvement effectively.

New feedback ×

To

 Adele Vance ×

Feedback template [\(Customize templates\)](#)

Performance Improvement Plan (P.I.P.) ▾

PIP, or Performance Improvement Plan, is a process that is used to address and correct performance issues within an organization.

Can you provide specific examples of the employee's performance issues and their impact on the team or organization?

You can write your feedback here

What specific steps do you recommend the employee take to improve their performance?

You can write your feedback here

Requesting Feedback on Behalf of Employees

Managers often seek insights into their team members' performance and how they are perceived by others. This use case outlines a process where managers periodically request feedback on behalf of their employees to gain a holistic perspective.

Steps:

- 1 Managers initiate a feedback request within Teamflect, seeking input from colleagues, peers, and team members regarding their assigned employees.
- 2 Respondents receive the feedback request and provide input through Teamflect, sharing their observations and assessments of the employee's performance.
- 3 The system compiles the feedback responses.
- 4 Managers review the feedback with the employee, discussing areas of strength and areas for improvement.

Benefits:

- 1 **360° Perspective:** Gathering feedback from multiple sources provides a comprehensive view of an employee's performance.
- 2 **Objective Insights:** Input from colleagues and peers can offer more objective insights into an employee's strengths and areas for growth.
- 3 **Development Focus:** Feedback discussions help employees understand their performance and focus on improvement.

New feedback ×

Give feedback **Ask for feedback** Self-assessment

About
Someone on my team ▼

Team member
Janet Moore ▼

From
HM Hakan Morrison × Search for a person...
You can also ask for feedback from people outside your organization ⓘ
[Learn more](#)

Feedback template [\(Customize templates\)](#) 🔗
General Feedback ▼
Give feedback to your colleague about anything
[See questions>](#)

Your message (optional)

Requesting Feedback From External Users

Requesting feedback from external users involves reaching out to individuals who are not part of your organization to gather valuable insights and opinions. This process can be instrumental in improving products, services, and partnerships. [Learn more.](#) [Watch the video.](#)

Steps:

- 1 Go inside the Feedback module and click on the "New Feedback" button.
- 2 Identify the individual for whom the feedback is intended, which could be yourself or a team member and enter the name of the external individual from whom you're seeking feedback.
- 3 Select an appropriate feedback template that aligns with your objectives.
- 4 After the external user submits their feedback, you can access it under the "Received" tab.

Benefits:

- 1 **Enhanced Decision-Making:** External feedback provides fresh perspectives that can inform strategic decisions and improvements.
- 2 **Strengthened Partnerships:** Soliciting input from external users fosters stronger relationships and demonstrates a commitment to collaboration.
- 3 **Product and Service Improvement:** Valuable insights from external sources can drive enhancements to products and services, boosting competitiveness.

The screenshot displays a user interface for requesting feedback. At the top, the title "Ask for feedback" is centered. Below it, a "From" label is positioned above a text input field containing "olivia@gmail.com" and a blue "Ext" button. A dropdown menu is open below the input field, listing three external users: "olivia@gmail.com" with a profile picture and a blue "External User" tag, "oleg@hotmail.com" with a profile picture, and "olive@mrg.com" with a green profile picture and a blue "External User" tag. A mouse cursor is hovering over the "External User" tag for "olivia@gmail.com". At the bottom of the interface, there is a blue button labeled "Request →".

Group Feedback After a Project

Feedback After a Project is a comprehensive approach to gathering feedback from various stakeholders involved in a project, enabling teams to enhance their project management practices and outcomes. [Learn more.](#)

Steps:

- 1 Define the specific aspects of the project you want feedback on.
- 2 Identify stakeholders who were part of the project, including team members, clients, and collaborators.
- 3 Initiate the feedback process by sending requests through Teamflect.
- 4 Collect feedback from all participants to maintain objectivity.
- 5 Analyze the feedback to identify project strengths, weaknesses, and areas for improvement.
- 6 Utilize the feedback to refine project management strategies and enhance future project outcomes.


Benefits:


- 1 **Comprehensive Insight:** Gather feedback from various project stakeholders for a holistic view of project performance.
- 2 **Targeted Improvements:** Tailor project management strategies based on feedback to ensure better project outcomes.
- 3 **Enhanced Project Success:** Encourage continuous improvement in project execution, leading to more successful projects.

New feedback ×

Give feedback Ask for feedback

To

 Adele Vance ×

Feedback template [\(Customize templates\)](#) 

Project-Based Feedback ▾

Project-based feedback involves evaluating and giving constructive criticism on an employee's performance and contributions on a specific project, to help them improve their skills and the overall outcome of the project.

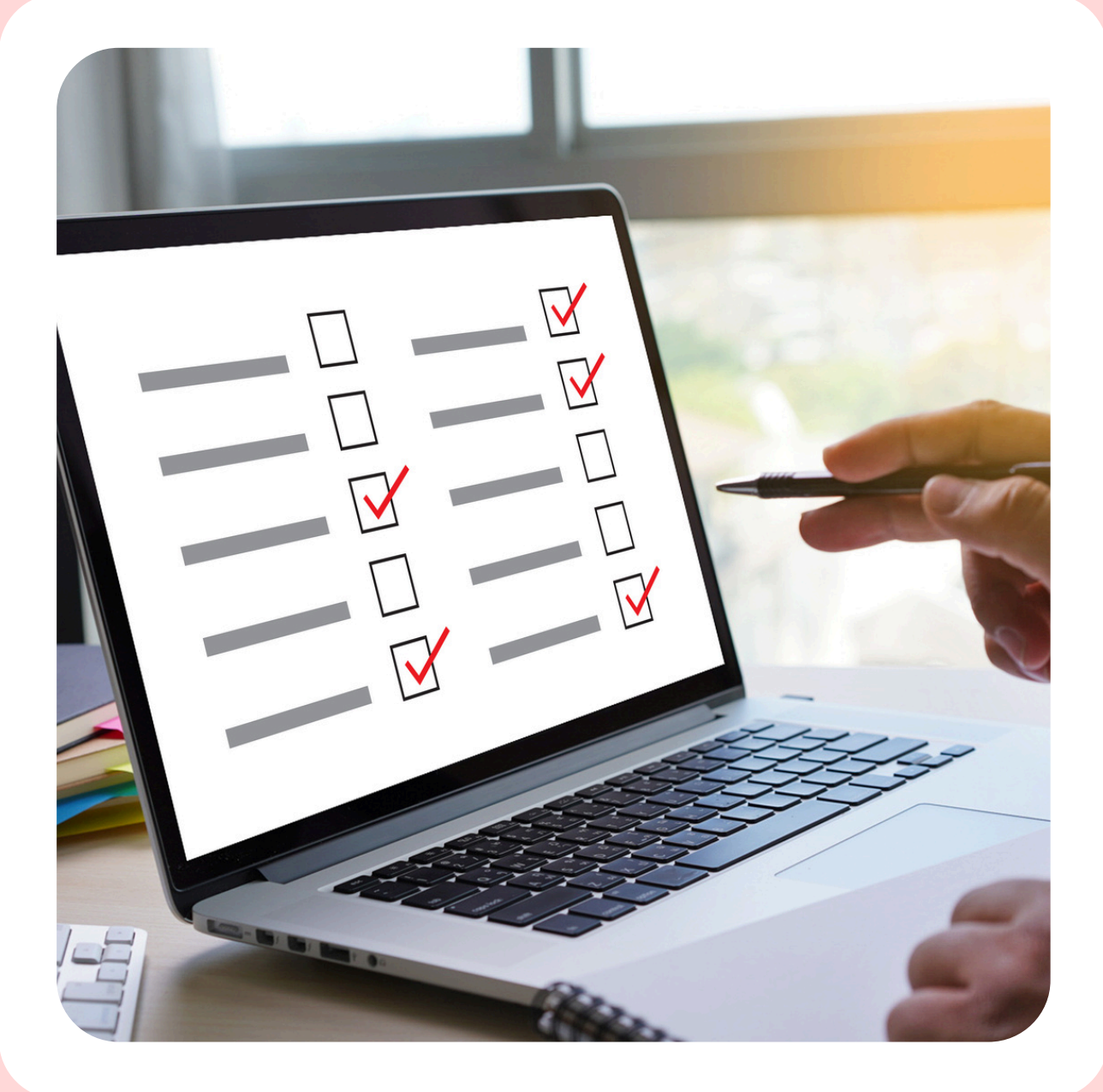
Which project are you giving feedback on?

You can write your feedback here

How did the employee's performance on this project compare to your expectations?

You can write your feedback here

Surveys



Anonymous Employee Engagement Survey

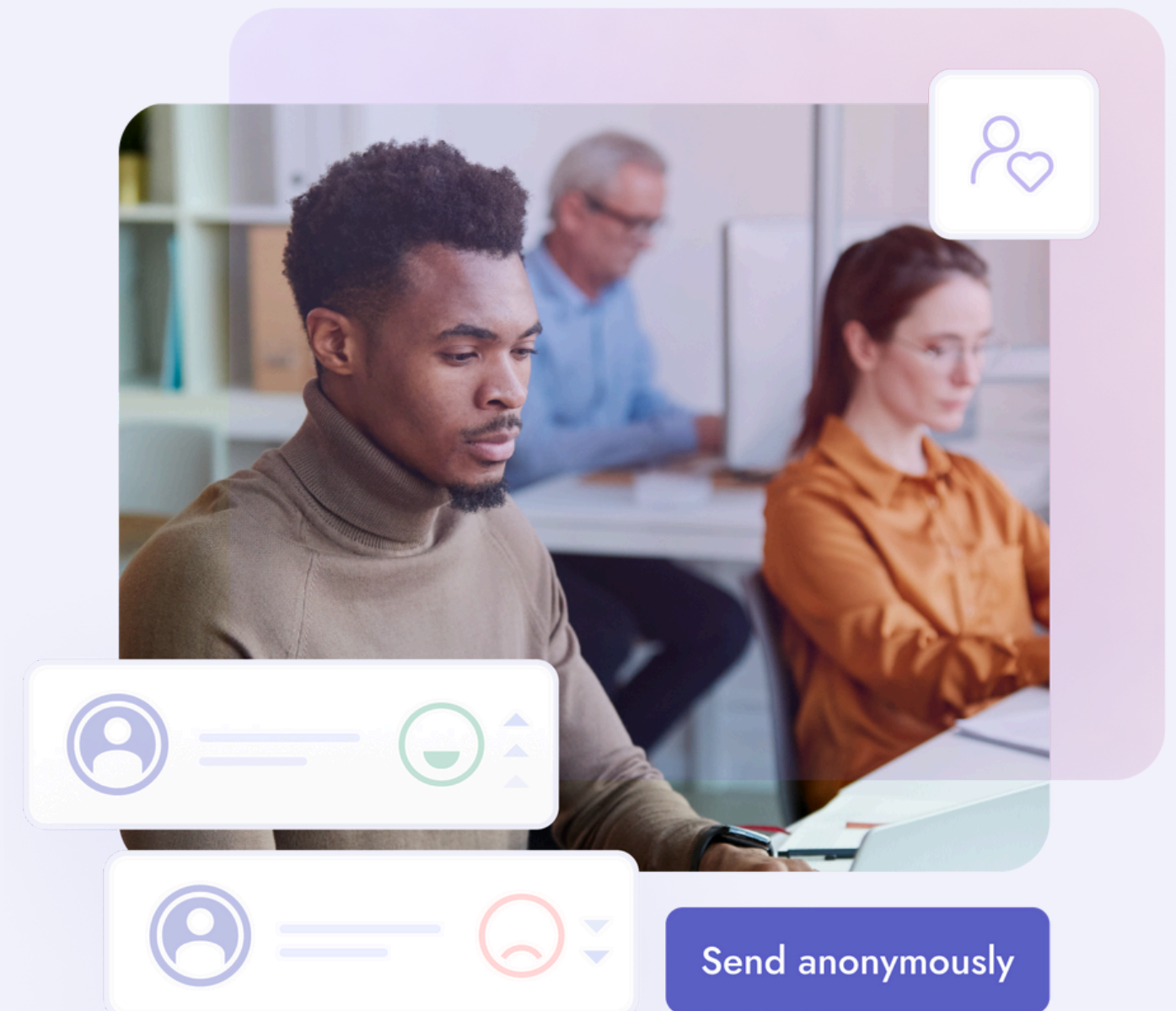
Engaging employees and gathering valuable feedback is crucial for organizational growth. This use case allows employees to participate in anonymous surveys to share their thoughts and concerns, promoting a candid and open communication channel. [Learn more.](#)

Steps:

- 1 HR or management initiates the anonymous employee engagement survey using Teamflect's survey module.
- 2 Employees receive the adaptive survey cards and submit their feedback confidentially, ensuring their anonymity.
- 3 Collected responses are analyzed within Teamflect, providing valuable insights into employee engagement levels.
- 4 Based on the survey results, HR and management can formulate action plans to address issues and enhance employee satisfaction.

Benefits:

- 1 **Honest Feedback:** Anonymity encourages employees to provide honest feedback without fear of reprisal, leading to more accurate insights.
- 2 **Improved Engagement:** Insights from the survey enable organizations to make informed decisions and implement changes to boost employee engagement.
- 3 **Transparency:** Open communication and action planning demonstrate the organization's commitment to employee well-being and growth.



Monthly Employee Pulse Survey

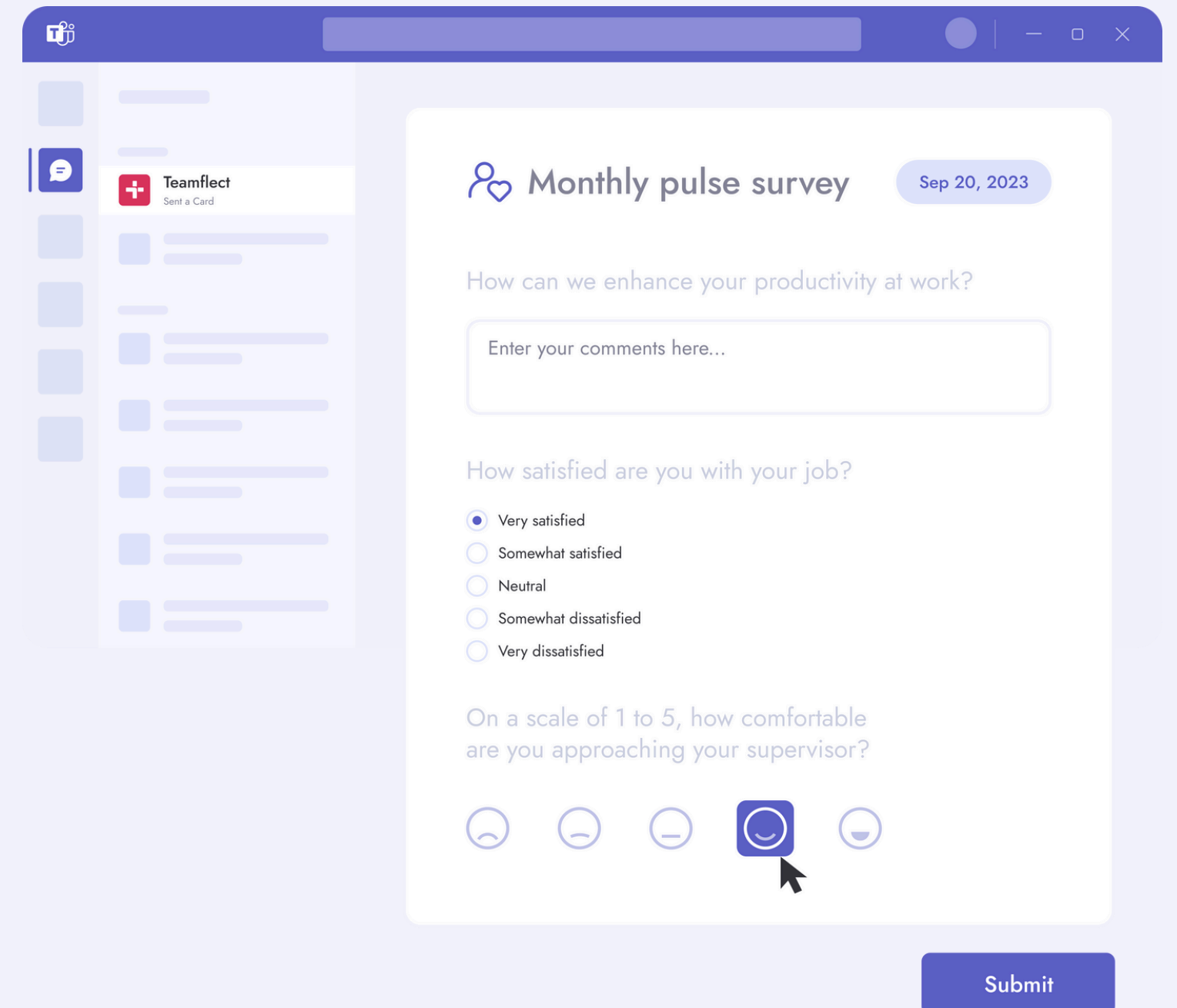
The Monthly Employee Pulse Survey is a survey conducted regularly within the organization to gauge employee sentiment, gather feedback, and assess the overall well-being of the workforce. [Learn more.](#) [Watch the video.](#)

Steps:

- 1 Set automation for the Monthly Employee Pulse Survey within Teamflect.
- 2 Craft a set of questions or use Teamflect's existing question sets to measure employee satisfaction, engagement, and concerns.
- 3 Share the survey with all employees, encouraging their participation.
- 4 Gather survey responses and analyze them to identify trends and areas for improvement.
- 5 Share survey results with employees and develop action plans to make improvements.

Benefits:

- 1 **Real-time Insights:** Regular surveys provide up-to-date insights into employee sentiments.
- 2 **Employee Engagement:** Show employees their voices are valued, leading to increased engagement.
- 3 **Continuous Improvement:** Address issues promptly, enhancing overall workplace satisfaction.



The screenshot displays a web browser window with a Teamflect survey titled "Monthly pulse survey" dated "Sep 20, 2023". The survey content includes:

- A question: "How can we enhance your productivity at work?" followed by a text input field labeled "Enter your comments here...".
- A question: "How satisfied are you with your job?" with five radio button options: "Very satisfied", "Somewhat satisfied", "Neutral", "Somewhat dissatisfied", and "Very dissatisfied".
- A question: "On a scale of 1 to 5, how comfortable are you approaching your supervisor?" with five smiley face icons representing a scale from 1 (sad) to 5 (happy). The fourth icon (smiling) is selected, and a mouse cursor is pointing at it.
- A blue "Submit" button at the bottom right.

Onboarding Experience Survey

The Onboarding Experience Survey assesses the effectiveness of the onboarding process, helping organizations refine their onboarding programs for new hires. [Watch the video.](#)

Steps:

- 1 Set automation for the Onboarding Experience Survey within Teamflect.
- 2 Craft a set of questions that cover aspects of the onboarding process, from training to integration into the team. Or use Teamflect's existing question sets.
- 3 Automatically send the survey to new employees as part of the onboarding process.
- 4 Collect and analyze feedback to evaluate the onboarding experience.
- 5 Identify areas for improvement based on feedback to enhance the onboarding process for future hires.

Benefits:

- 1 **Improved Onboarding:** Gather insights to create a more effective and engaging onboarding experience.
- 2 **Enhanced Retention:** Ensure new employees feel welcome and are more likely to stay.
- 3 **Efficient Processes:** Streamline onboarding processes based on feedback for cost-effective operations.

The screenshot displays the 'Onboarding Survey' interface. At the top, there's a header with the title 'Onboarding Survey', a '+4' notification, and three user avatars. Below the header is a 'Send reminder' button and a 'Collapse' link. The main content is divided into two sections: 'Respondents' and 'All Responses'. The 'Respondents' section lists names and submission status: Miriam Graham (14th June, 2023), Adele Vance (Not submitted yet), Alex Wilber (Not submitted yet), Adele Vance (Not submitted yet), Alex Wilber (Not submitted yet), Grady Archie (Not submitted yet), and Adele Vance (Not submitted yet). The 'All Responses' section shows a bar chart for the question 'experience?' with options A. Excellent, B. Good (1 respondents (100%)), C. Average, D. Poor, and E. Very Poor. Below the chart is a text question: 'On a scale of 1-5, how satisfied are you with the level of training and support provided during your onboarding process?' followed by a 5-star rating and a user avatar.

Remote Work Satisfaction Survey

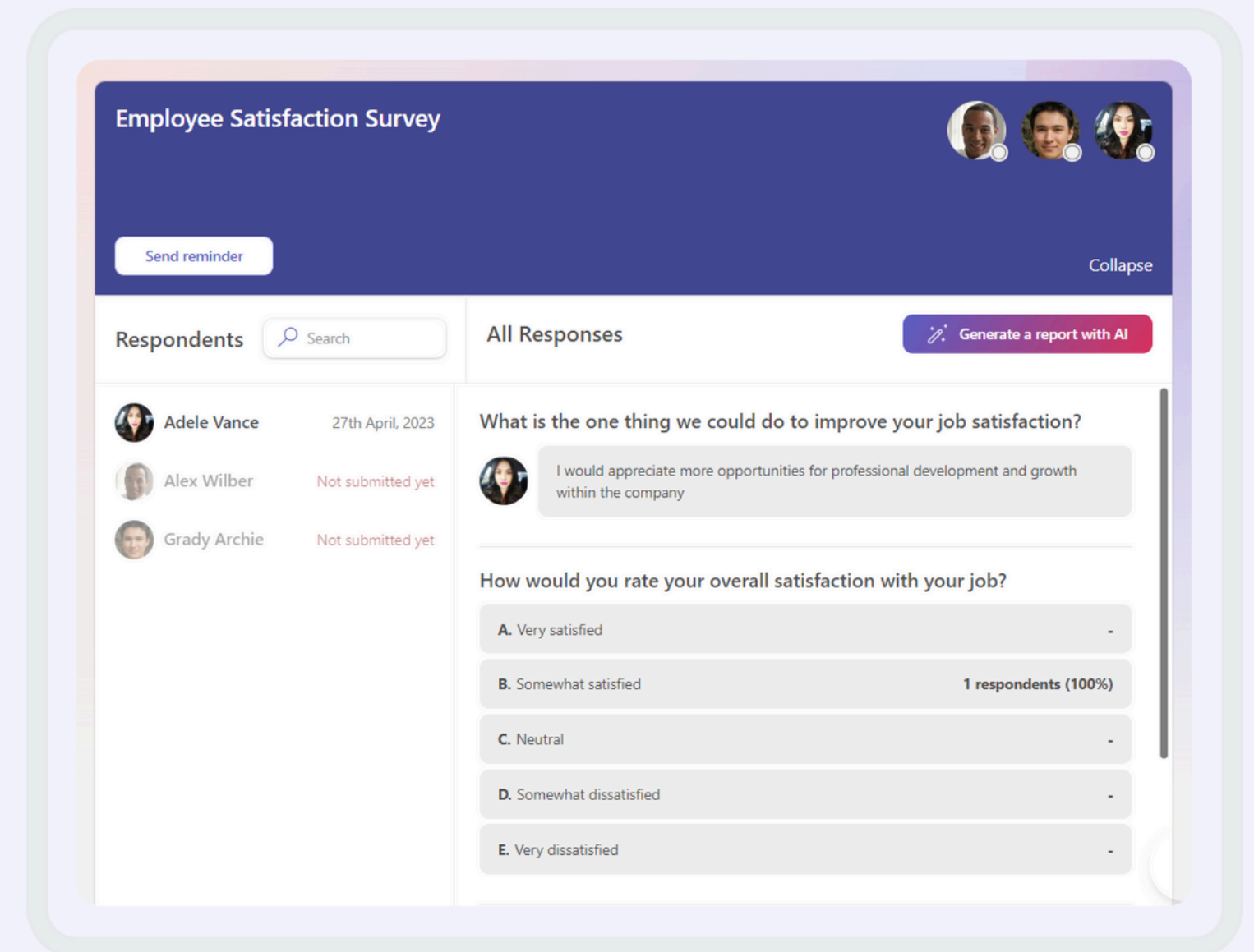
The Remote Work Satisfaction Survey evaluates how well employees are adapting to remote work and provides insights into their needs and challenges.

Steps:

- 1 Set automation for the Remote Work Satisfaction Survey within Teamflect.
- 2 Develop a series of questions that address remote work effectiveness, work-life balance, and communication. Or use Teamflect's existing question sets.
- 3 Schedule periodic surveys to monitor remote work satisfaction.
- 4 Distribute the survey link to remote employees and encourage their participation.
- 5 Analyze responses to understand remote work challenges and satisfaction levels.
- 6 Implement improvements based on feedback to optimize remote work policies and support.

Benefits:

- 1 **Remote Work Optimization:** Enhance remote work policies and support based on employee feedback.
- 2 **Employee Well-being:** Address remote work challenges to improve employee satisfaction and mental health.
- 3 **Talent Retention:** Ensure remote employees are satisfied and motivated to stay with the organization.



Post-Training Effectiveness Survey

The Post-Training Effectiveness Survey evaluates the impact of training programs on employees' knowledge, skills, and overall training satisfaction.

Steps:

- 1 Set automation for the Post-Training Effectiveness Survey within Teamflect.
- 2 Develop a set of questions to assess training content, delivery, and effectiveness. Or use Teamflect's existing question sets.
- 3 Administer the survey immediately after training sessions or programs.
- 4 Distribute the survey to training participants and request their feedback.
- 5 Analyze responses to gauge the effectiveness of training and identify areas for improvement.
- 6 Use feedback to refine training programs.

Benefits:

- 1 **Training Enhancement:** Improve training content and delivery methods for better learning outcomes.
- 2 **Skill Development:** Assess the impact of training on employees' skills and knowledge.
- 3 **Cost-Efficient Training:** Optimize training investments by focusing on what works best.

The screenshot displays a survey interface for 'Employee Training Survey' by Adele Vance, a Retail Manager. The survey is currently 'Waiting for completion'. The interface includes an 'Autosave' toggle and a section titled 'Employee Training Survey Questions'. The first question asks if there are any particular training programs to be offered in the future, with a text input field for comments. The second question asks which training programs were attended in the past 6 months, with a list of options: Leadership and management skills, Technical skills (e.g., software, programming), Soft skills (e.g., communication, teamwork), Diversity and inclusion, and Compliance and ethics.

Adele Vance
Retail Manager

Visibility: Adele Vance's manager
Due date: Jan 20th 2024

Employee Training Survey

Waiting for completion

This survey aims to gather feedback from employees on the training programs provided by the company.

Autosave - Your answers will not be visible to anyone until you submit them

Employee Training Survey Questions

Please take a few moments to provide your feedback on our employee training program by answering the following survey questions honestly, in order to help us evaluate its effectiveness and identify areas for improvement.

Is there any particular training program that you would like to see offered by the company in the future?

You can write your comments here

Which of the following training programs have you attended in the past 6 months? (Select all that apply)

- Leadership and management skills
- Technical skills (e.g., software, programming)
- Soft skills (e.g., communication, teamwork)
- Diversity and inclusion
- Compliance and ethics

Recognitions



Peer-to-Peer Recognition Program

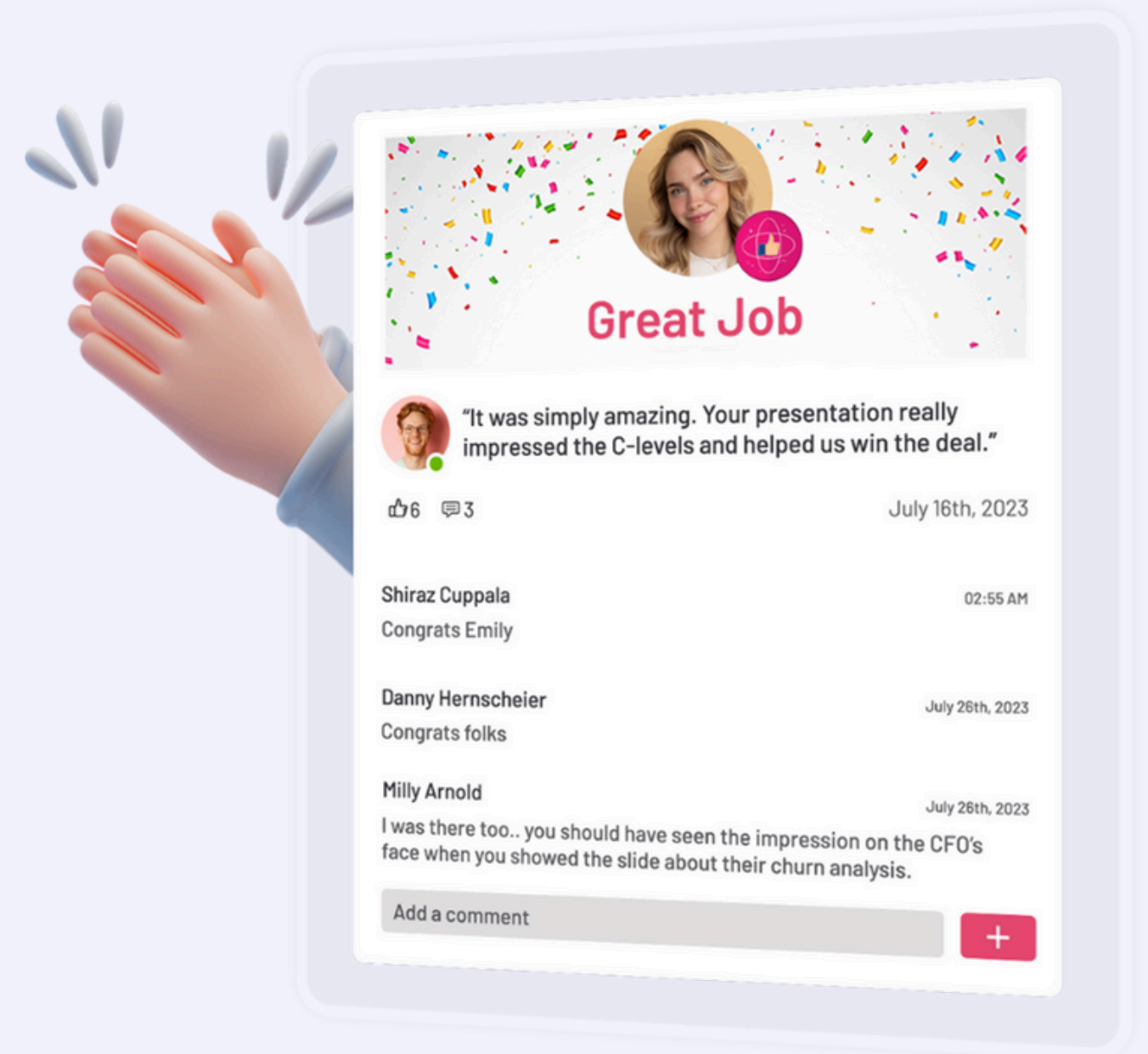
A Peer-to-Peer Recognition Program is designed to encourage employees to acknowledge and appreciate each other's contributions, fostering a positive and supportive workplace culture. [Learn more.](#) [Watch the video.](#)

Steps:

- 1 Establish a Peer-to-Peer Recognition Program using Teamflect.
- 2 Encourage employees to recognize their peers for outstanding efforts and achievements.
- 3 Create a channel within Teams for employees to submit recognition.
- 4 Implement a reward or acknowledgment system to celebrate recognized employees.

Benefits:

- 1 **Improved Morale:** Boost employee engagement and motivation by recognizing and appreciating their contributions.
- 2 **Positive Culture:** Cultivate a culture of appreciation and collaboration within the organization.
- 3 **Enhanced Team Dynamics:** Strengthen teamwork and camaraderie among employees.



Managerial Recognition

Managerial Recognition involves leaders and managers acknowledging and appreciating the efforts and achievements of their team members, enhancing employee morale and job satisfaction.

Steps:

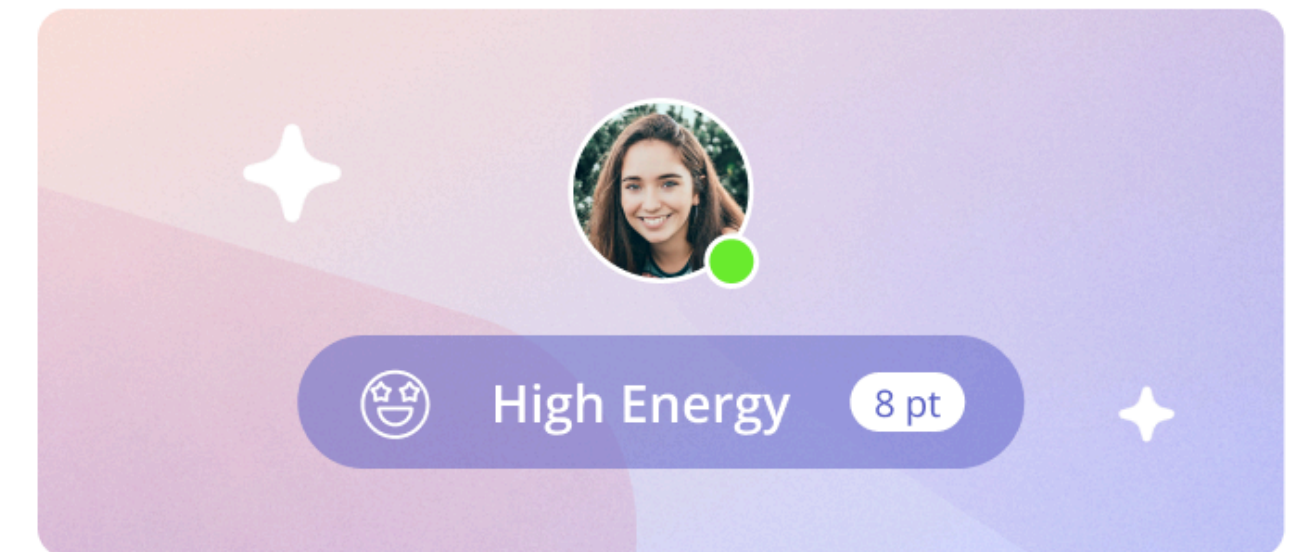
- 1 Educate managers and leaders on the importance of regular recognition.
- 2 Encourage managers to provide timely and specific recognition to their team members.
- 3 Monitor and track recognition activities to ensure consistency and fairness.
- 4 Assess the impact of managerial recognition on employee performance and engagement.

Benefits:

- 1 **Increased Employee Satisfaction:** Recognized employees tend to be more satisfied with their jobs and committed to their roles.
- 2 **Better Leadership:** Promote leadership skills by encouraging managers to acknowledge and appreciate their teams.
- 3 **Stronger Team Performance:** Recognition fosters a positive work environment and strengthens team dynamics.

My latest recognition

Miriam Graham sent a recognition to Adele Vance.



"Your efforts have greatly contributed to our success..."

👍 0 ❤️ 1

Nov 3rd 2023

Project Achievement Recognition

Project Achievement Recognition celebrates the successful completion of projects and acknowledges the contributions of team members who played a pivotal role in project success.

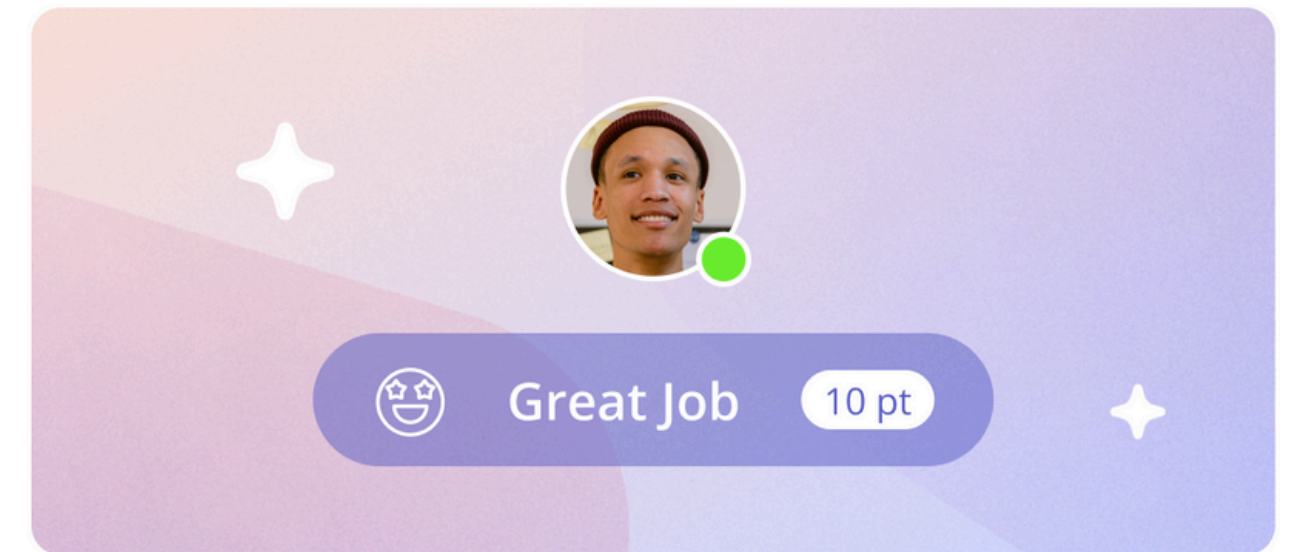
Steps:

- 1 Define criteria for recognizing project achievements, such as meeting goals, deadlines, or overcoming challenges.
- 2 Encourage project managers and team leads to nominate team members for recognition.
- 3 Celebrate project milestones and achievements as part of the recognition process.
- 4 Evaluate the impact of project recognition on team motivation and project outcomes.

Benefits:

- 1 **Motivated Teams:** Recognizing project achievements boosts team morale and motivation.
- 2 **Improved Project Outcomes:** Acknowledging contributions encourages team members to excel in future projects.
- 3 **Enhanced Collaboration:** Project recognition fosters a collaborative and supportive project culture.

Miriam Graham sent a recognition to Alex Wilber.



"Congratulations to Alex for successfully completing the project! Their dedication, hard work, and expertise have been instrumental in achieving our goals..."

👍 0 ❤️ 4

May 3rd 2024

Peer Recognition and Nomination

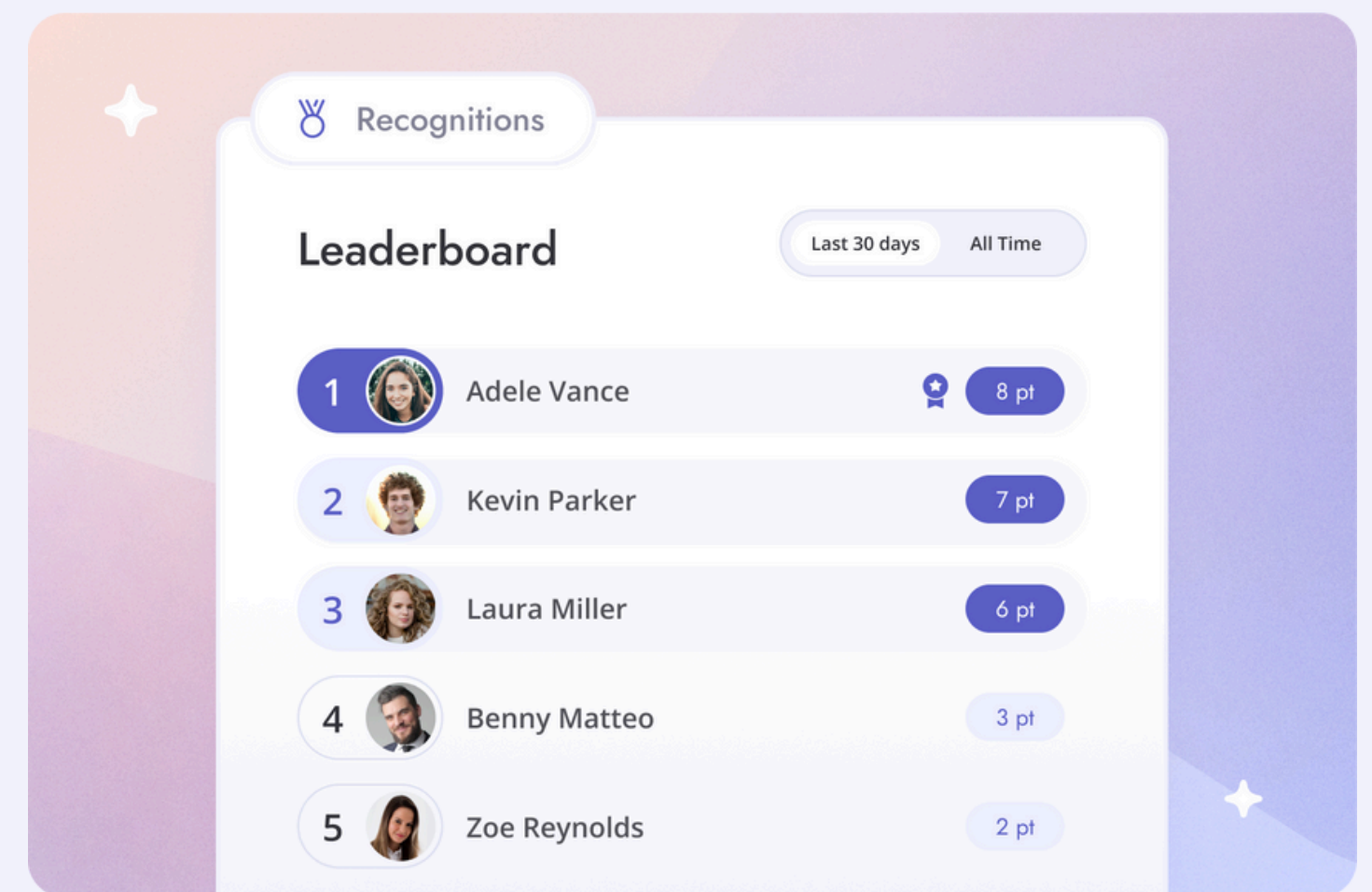
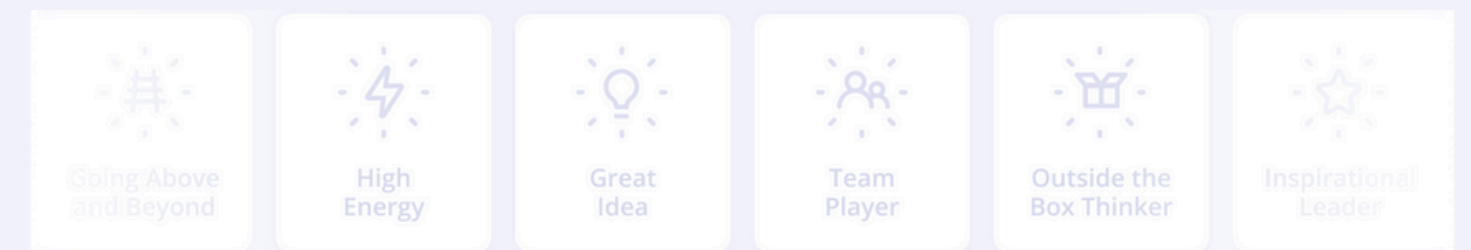
Recognizing and celebrating the achievements of colleagues is a vital part of fostering a positive workplace culture. In this use case, the company encourages employees to nominate their peers for awards during a specified time period.

Steps:

- 1 The company designates a specific time period during which all employees are invited to nominate their peers for awards.
- 2 Employees send recognitions for their colleagues within Teamflect, providing a brief explanation of why they believe the nominee deserves the award.
- 3 Teamflect generates a leaderboard view, displaying individuals who received recognition, one by one, highlighting their points and the recognition badges they received.
- 4 After the nomination period, the company or relevant committee reviews the nominations and selects recipients for the awards based on the recognition received.

Benefits:

- 1 **Recognition Culture:** Encourages a culture of appreciation and recognition among employees.
- 2 **Transparency:** The leaderboard view promotes transparency and celebrates the achievements of employees.
- 3 **Motivation:** The recognition process boosts employee motivation and engagement.



Reward Program with Recognition Points

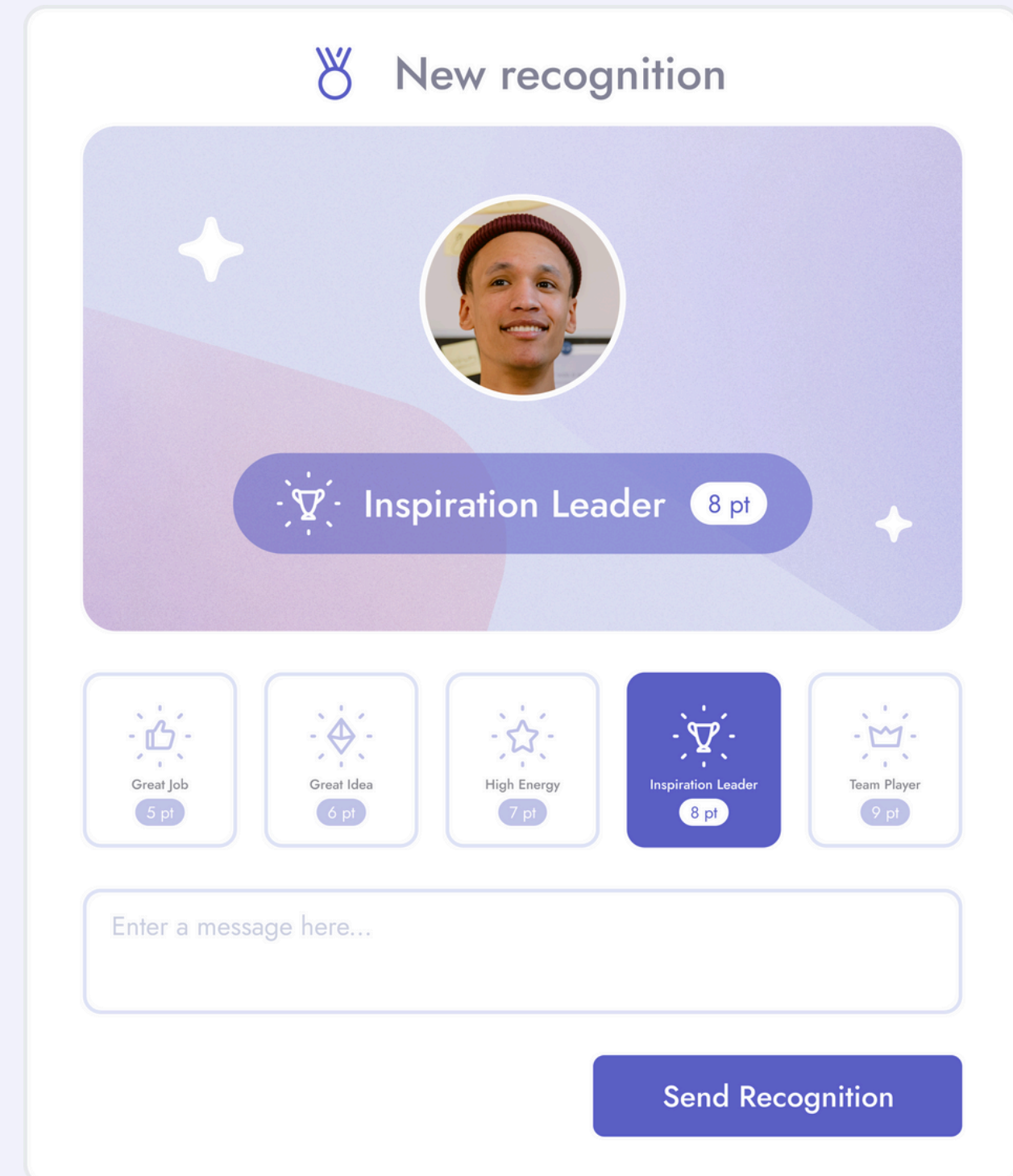
Acknowledging and rewarding outstanding employee contributions is essential for maintaining a motivated and engaged workforce. In this use case, employees can accumulate recognition badge points for the appreciations they receive and use these points for bonuses or rewards, enhancing the company's recognition and reward system.

Steps:

- 1 Employees receive recognitions within Teamflect, and each recognition carries recognition badge points based on its significance or impact.
- 2 Employees accumulate badge points over time as they receive more recognitions from peers, managers, or colleagues.
- 3 Employees can receive bonuses or rewards with the points they collect.

Benefits:

- 1 **Motivation:** Recognition badge points motivate employees to excel and receive recognition from their peers.
- 2 **Transparency:** The badge points system promotes transparency and fairness in the reward process.
- 3 **Employee Engagement:** The recognition and reward program enhances employee engagement and job satisfaction.



Anniversary and Milestone Recognition

Anniversary and Milestone Recognition acknowledges and celebrates employees' long-term commitment and achievements within the organization.

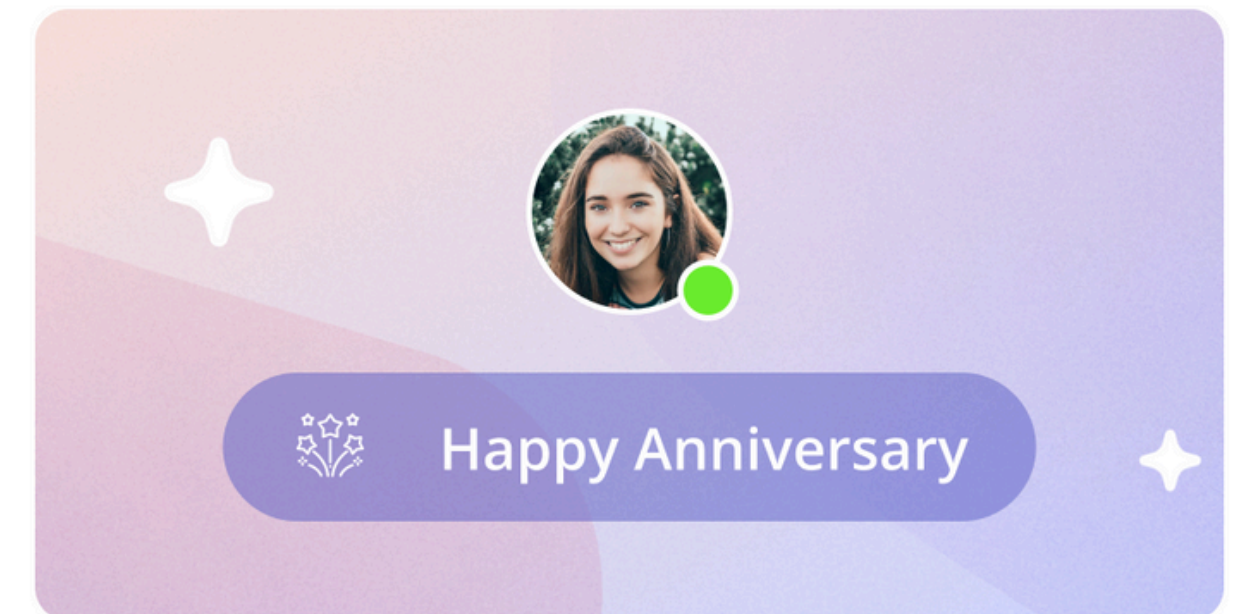
Steps:

- 1 Establish criteria for recognizing employee milestones, such as years of service or significant achievements.
- 2 Create a calendar to track upcoming anniversaries and milestones.
- 3 Recognize employees on their anniversaries or when they achieve significant milestones.
- 4 Monitor the impact of recognition on employee retention and job satisfaction.

Benefits:

- 1 **Increased Employee Retention:** Recognizing milestones enhances employee loyalty and commitment to the organization.
- 2 **Positive Work Environment:** Celebrating achievements contributes to a positive workplace culture.
- 3 **Employee Engagement:** Acknowledging milestones motivates employees to continue their contributions and growth within the organization.

Miriam Graham sent a recognition to Adele Vance.



"Happy work anniversary to Adele! Over the past year, your unwavering dedication, passion and..."

👍 0 ❤️ 1

Nov 3rd 2024

Tasks



Goal-Related Task Management

Goal-Related Task Management is a feature in Teamflect that allows organizations to link individual and team tasks directly to organizational goals and objectives. It ensures that tasks align with strategic priorities, facilitating better goal tracking and achievement. [Learn more.](#)

Steps:

- 1 Clearly articulate the key goals and objectives of the organization.
- 2 Establish categories or labels that relate to specific organizational goals.
- 3 When creating or assigning tasks within Teamflect, associate each task with the relevant goals.
- 4 Regularly review the status of tasks associated with each goal to gauge progress.
- 5 Assess whether tasks contribute to the achievement of organizational goals.

Benefits:

- 1 **Goal Alignment:** Ensure that tasks directly support organizational objectives, enhancing goal achievement.
- 2 **Improved Focus:** Employees prioritize tasks according to their alignment with strategic goals, leading to increased productivity.

The screenshot displays the Teamflect interface for a goal. At the top, it shows 'Current value: 2/2' and an 'Update Progress' button. Below this, the 'Outcome' is set to 'Achieved' with a green dot, and there is an 'Open goal' button. The 'Subgoals' section indicates 'There are no subgoals related to this goal' and includes an '+ Add new' button. The 'Comments (0)' and 'Progress updates (2)' sections are visible, with a rich text editor below them. On the right side, the goal's visibility is set to 'Public', and there are sections for 'Related groups (optional)', 'Labels', and 'Parent goal', each with an '+ Add' button. A red box highlights the 'Related tasks' section, which contains a task card for 'Strategic Expansion Plan Developm...' with a due date of 'Due Feb 28th 2024'.

Onboarding Task Assignment

This use case simplifies the process by allowing administrators to create task groups within the admin center and automatically assign them to new employees, facilitating a smooth onboarding experience.

Steps:

- 1 Access the admin center and create task groups, which can include a series of onboarding tasks and activities.
- 2 Upon a new employee's arrival, the predefined task group is automatically assigned to them, ensuring a consistent and comprehensive onboarding experience.
- 3 The system tracks the progress of assigned tasks
- 4 Task groups can be customized to suit different roles or departments, ensuring that beginners receive tailored onboarding experiences.

Benefits:

- 1 **Efficiency:** Automated task assignment saves time and standardizes onboarding experience.
- 2 **Consistency:** Predefined task groups promote consistency in onboarding across the organization.
- 3 **Adaptability:** Task groups can be adjusted to meet the specific needs of different roles, departments, or teams.

The screenshot shows a user interface for 'Automated Onboarding Tasks'. At the top, there's a header with a refresh icon, the title 'Automated Onboarding Tasks', and a user profile icon with a plus sign. Below the header, a card titled 'Onboarding: Ben Osborn' with a hand icon contains a table of tasks. The table has columns for 'Task', 'Assignee', and 'Date'. All tasks are checked. A 'Feedback' popup is visible on the right side of the card.

Task	Assignee	Date
<input checked="" type="checkbox"/> Welcome Session	BO	Jul 3
<input checked="" type="checkbox"/> Complete Your Profile	BO	Jul 3
<input checked="" type="checkbox"/> Walkthrough	BO	Jul 4
<input checked="" type="checkbox"/> QA	BO	Jul 5

Task Creation from Meetings

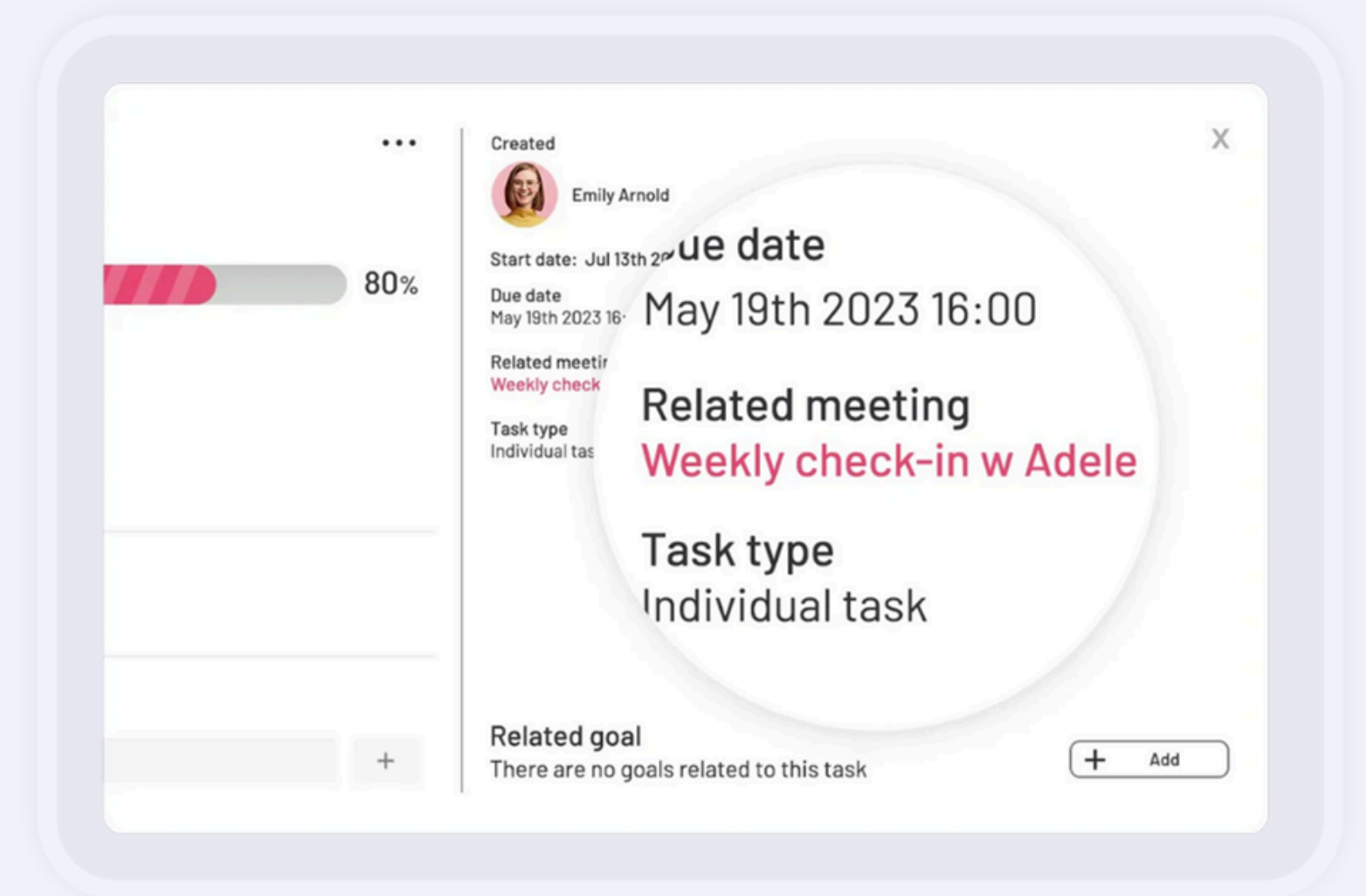
Task Creation from Meetings is a feature in Teamflect that simplifies the process of converting meeting discussions and action items into actionable tasks, ensuring that important follow-up actions are not overlooked. [Learn more.](#)

Steps:

- 1 Schedule and conduct meetings within Teamflect, recording discussions and action items.
- 2 After the meeting, easily convert identified action items and tasks into actionable tasks within Teamflect.
- 3 Assign task ownership to team members and set deadlines for completion.
- 4 Monitor task progress, receive notifications, and track completion.
- 5 Generate reports to assess task completion and meeting effectiveness.

Benefits:

- 1 **Improved Task Follow-Up:** Ensure that action items from meetings are promptly assigned and completed.
- 2 **Streamlined Workflow:** Seamlessly integrate meeting discussions and task management.
- 3 **Accountability:** Assigning tasks and deadlines enhances accountability within the organization.



Team Project Task Management

Team Project Task Management is a feature within Teamflect that streamlines task allocation, tracking, and collaboration for project teams. It enhances project coordination and productivity.

Steps:

- 1 Assign tasks to project team members based on project requirements and individual skills.
- 2 Monitor task progress, deadlines, and dependencies within Teamflect.
- 3 Facilitate collaboration by allowing team members to discuss tasks, share resources, and provide updates.
- 4 Enable task-related notifications to keep team members informed about changes and updates.
- 5 Generate task-related reports to evaluate project performance and identify areas for improvement.

Benefits:

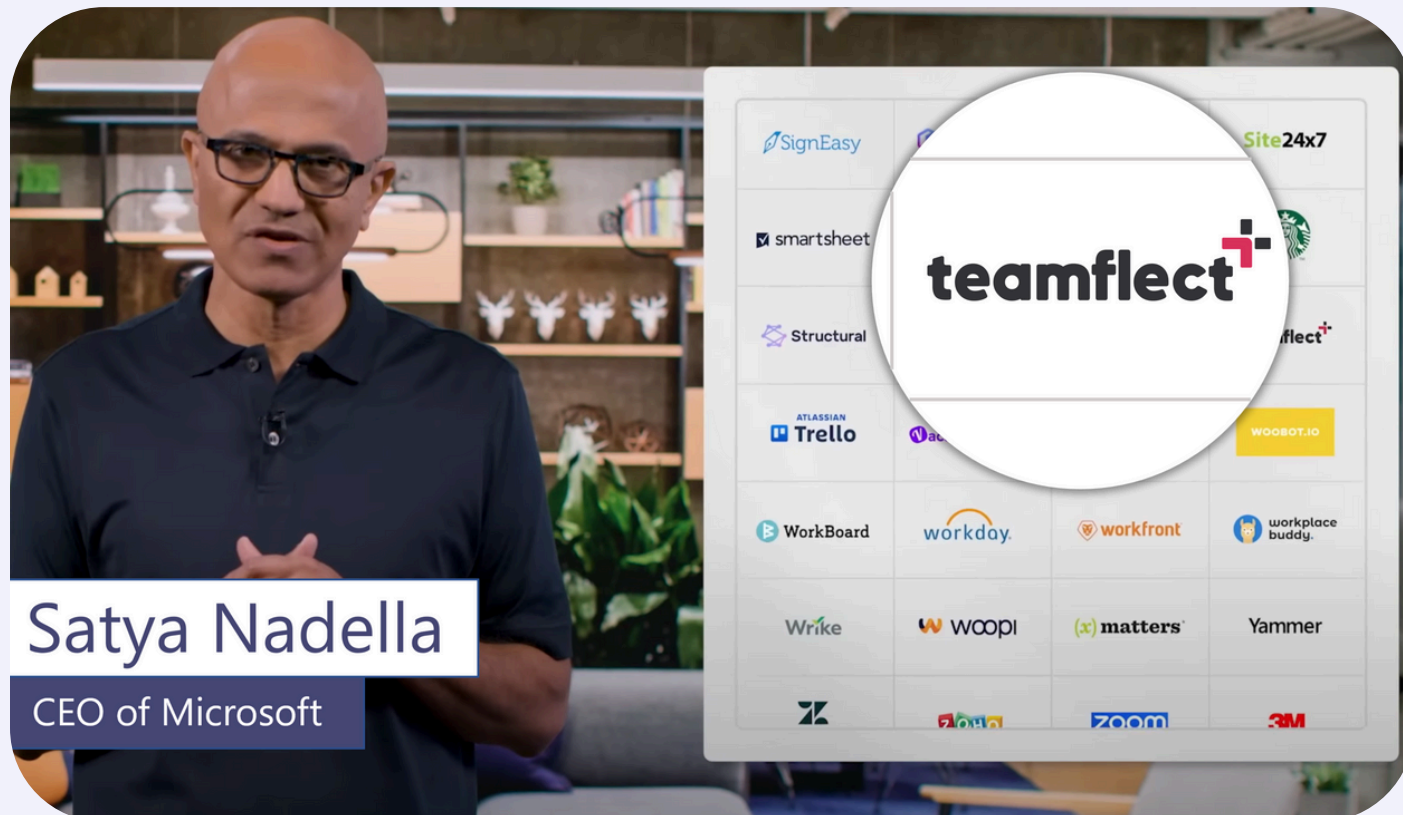
- 1 **Efficient Project Management:** Streamlined task allocation and tracking lead to more efficient project execution.
- 2 **Collaboration:** Enhance team collaboration through centralized task management and communication.
- 3 **Project Visibility:** Gain a clear overview of project progress and performance.





An Official Microsoft Partner

Teamflect is an official Microsoft Partner that has been featured by Microsoft on multiple occasions. You can read some of the Teamflect Success Stories published by Microsoft right here:



Satya Nadella
CEO of Microsoft



Teamflect eliminated manual work, streamlining employee engagement and reviews

[Read the full story published by Microsoft →](#)



CCI transforms performance management and empowers collaboration with Teamflect and Microsoft Teams

[Read the full story published by Microsoft →](#)

"Implementing a performance management system has never been easier."

As a Microsoft native application, Teamflect is intuitive and easy to implement. Just to be safe, we offer comprehensive implementation support, extensive tutorial libraries, and personalized end-user training.



"Teamflect offered to train my end users for me. I was able to do that on my own but the fact that they were willing to jump on a call and train was very much appreciated."

Barbara Tonelli

Director of Enablement, Align HCM



100-200



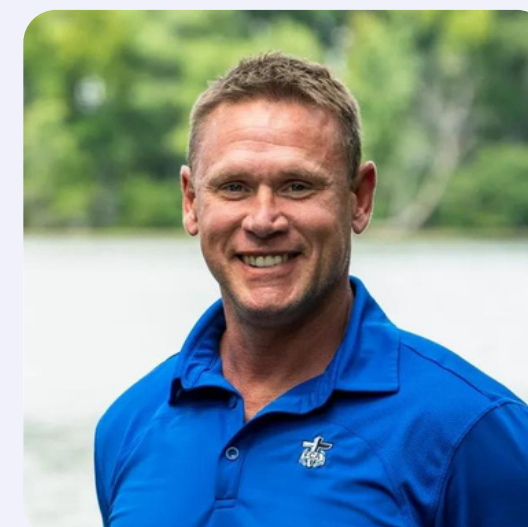
"The training and the learning curve have been so great with Teamflect's built-in tutorials and the videos."

Tim Spearin

Director of Org. and Community Impact, Gas South



500-1000



"I felt like the implementation was pretty smooth. It's easy to work with. I love going into the system settings and customizing some of the things that we're able to do."

Jason McCormick

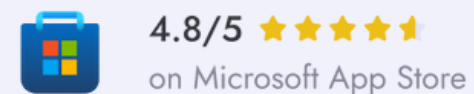
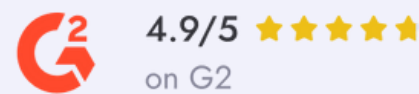
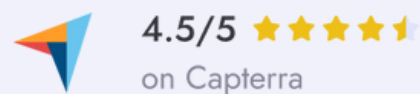
Multi-Area Director, FCA



1000-5000

Over 500 forward-thinking organizations use Teamflect.

Let's hear what some of them have to say about our product



[Play the video](#)

We are proud to be the performance management software for choice for such an amazing community!



Curious about just how big of a difference Teamflect can make in your performance management process?

Try Teamflect

Schedule a Demo

info@teamflect.com

+1 (323) 591 84 19



The screenshot shows the Teamflect dashboard for user Adele Vance. The left sidebar contains navigation options: Home, Goals, Meetings, Tasks, Reviews, Survey, Feedback, Recognitions, Notes, User Search, Upgrade Now, Invite People, Reports, and Adele. The main content area is titled 'Hello, Adele Vance' and includes a 'Me My People' link. Below this, there are sections for 'My upcoming meetings' (listing Adele-Mariam 1-1 meeting, Monthly Team Check-In, and Weekly with Managers) and 'My active goals' (listing various goals with progress percentages). A 'View All' link is present for both sections. On the right, there is an 'Overall Progress' gauge showing 33% completion, with a legend for status categories: No Status, On Track, At Risk, Off Track, and Closed.

