# Lattice

*Lesson 1 of 6*

# About Lattice

## How can I use Lattice at Shopmonkey?

Lattice is our people platform that lets you submit updates and performance reviews, share and receive feedback, schedule 1:1 meetings, set goals, and more. In this course, you will learn how Lattice can support you, your colleagues, and Shopmonkey overall.

**Explore Lattice**

Click the purple button on the right to open Lattice. You can reference Lattice as needed while completing this course.

GO TO LATTICE

CONTINUE

# Feedback

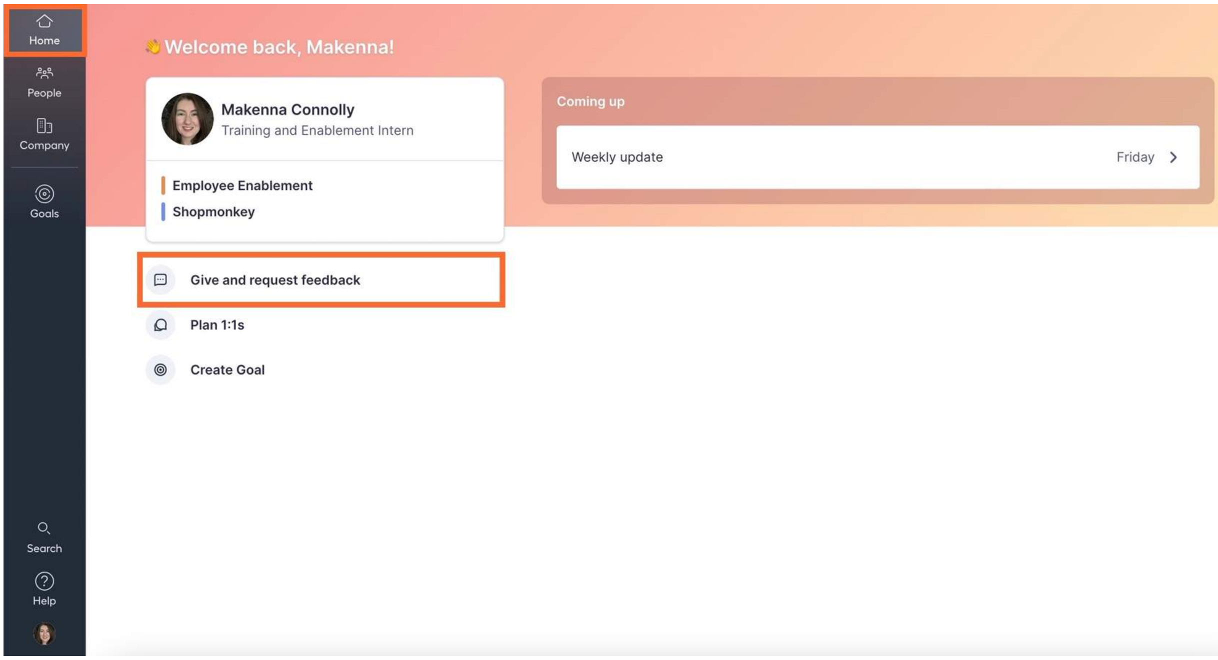
## Give feedback

At any time, you can share and receive feedback through Lattice. Feedback is especially helpful during quarterly performance reviews, which are explored later in this course.

### Give and manage feedback in Lattice

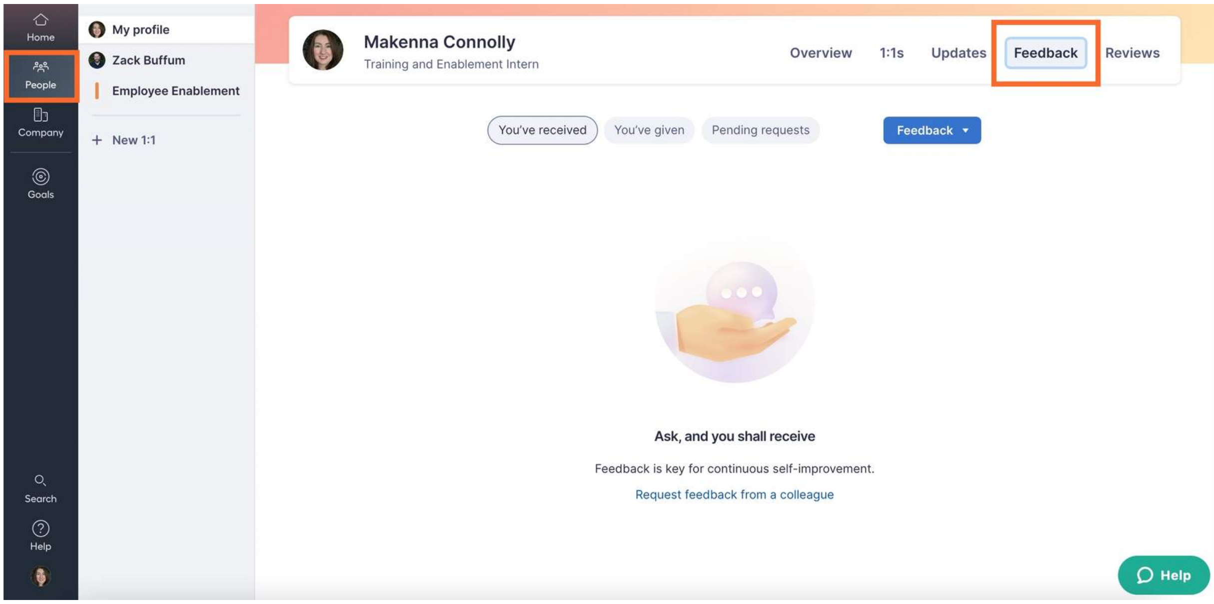
GIVE FEEDBACK | KEEP TRACK OF FEEDBACK

On your **Home** page, click the **Give and request feedback** button, as seen in the image below. This will automatically open the **Give feedback** tab on the **Feedback** menu. Here, you can select who you are giving feedback to, whether the feedback is public or private, and more. Click the image for a closer look at how to give feedback.




| GIVE FEEDBACK | KEEP TRACK OF FEEDBACK |
|---|---|

To keep track of the feedback, first click **People** on the upper left sidebar, as seen in the image below. This will take you to the **My profile** page. On the upper right side of your profile page, click **Feedback**. Here, you will be able to see feedback you've received, given, and requested. Click the image below for a closer look at keeping track of your feedback.



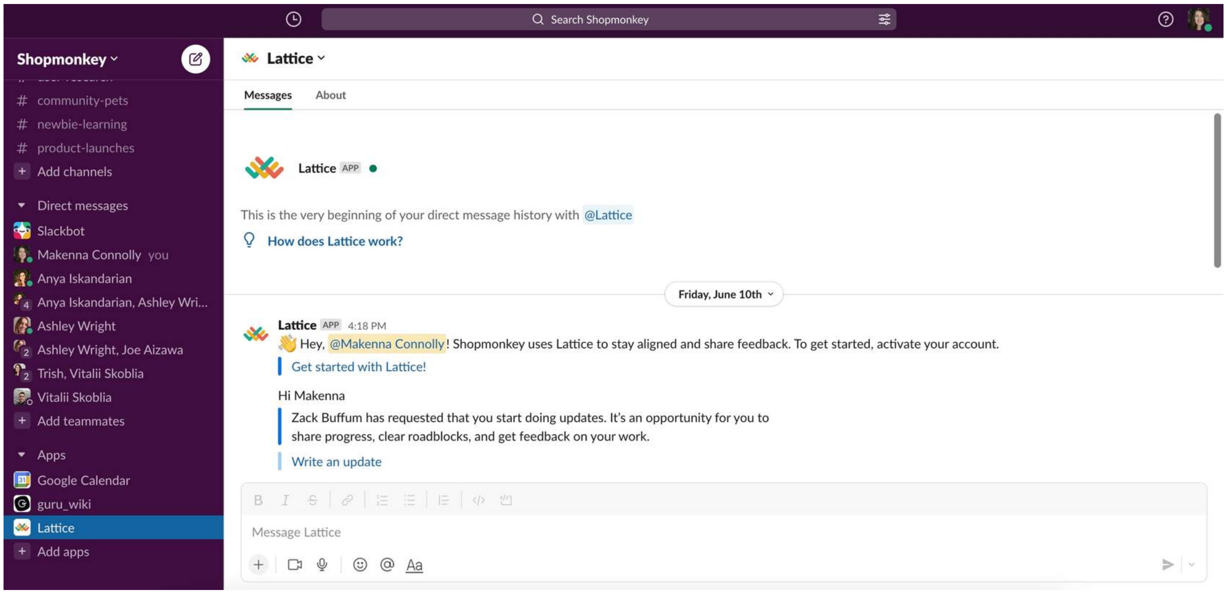

Tip: Review Brené Brown's [Engaged Feedback Checklist] to see if you're ready to give effective feedback!

## Use the Slack Lattice app

| LATTICE IN SLACK | NOTIFICATIONS |
| --- | --- |

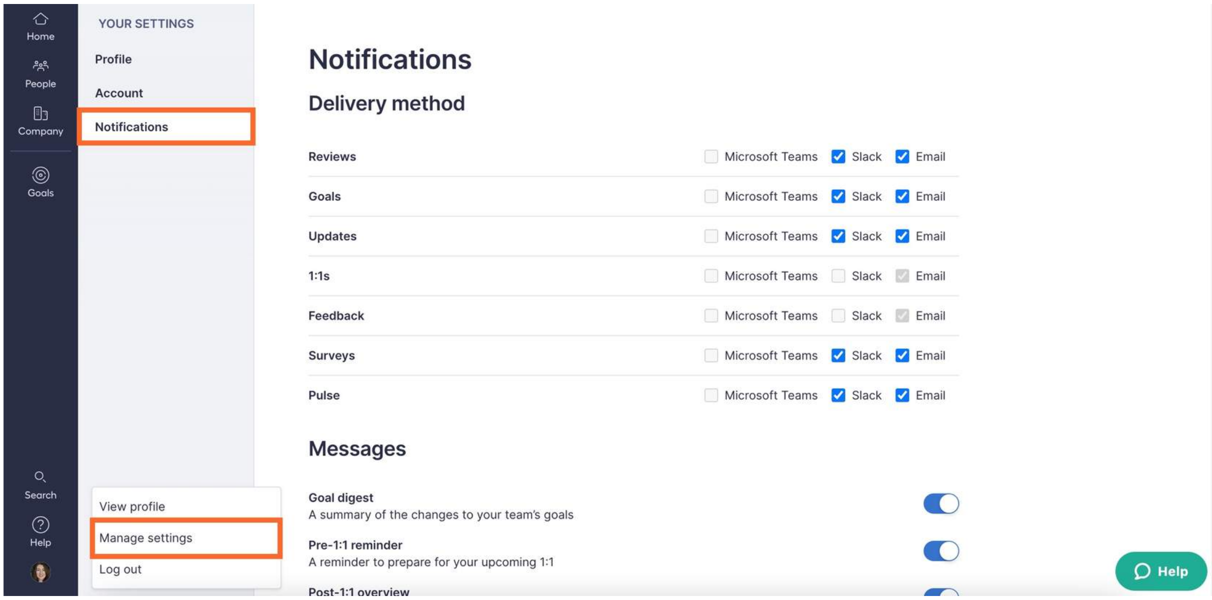
Although it's not widely used at the moment, there is a /praise command to give positive feedback through Slack!

For now, it's important to know that when you enable the Lattice app in Slack, you will receive notifications for updates, performance reviews, and more.  Click the image for a closer look at the Lattice app in Slack.




| LATTICE IN SLACK | NOTIFICATIONS |
| --- | --- |

To customize your Slack notifications, return to Lattice in your web browser. Click on your profile icon at the bottom left corner of any page. This will open a small menu next to your profile icon. Click **Manage settings** and then **Notifications**, as seen in the image below. Under the **Delivery method** section, you will be able to adjust most of your notification settings for Slack and email. Click the image for a closer look at your notification settings.


Home
People
Company
Goals
Search
Help
YOUR SETTINGS
Profile
Account
Notifications
View profile
Manage settings
Log out
Notifications
Delivery method
Reviews Microsoft Teams Slack Email
Goals Microsoft Teams Slack Email
Updates Microsoft Teams Slack Email
1:1s Microsoft Teams Slack Email
Feedback Microsoft Teams Slack Email
Surveys Microsoft Teams Slack Email
Pulse Microsoft Teams Slack Email
Messages
Goal digest
A summary of the changes to your team's goals
Pre-1:1 reminder
A reminder to prepare for your upcoming 1:1
Post-1:1 overview
Help

CONTINUE

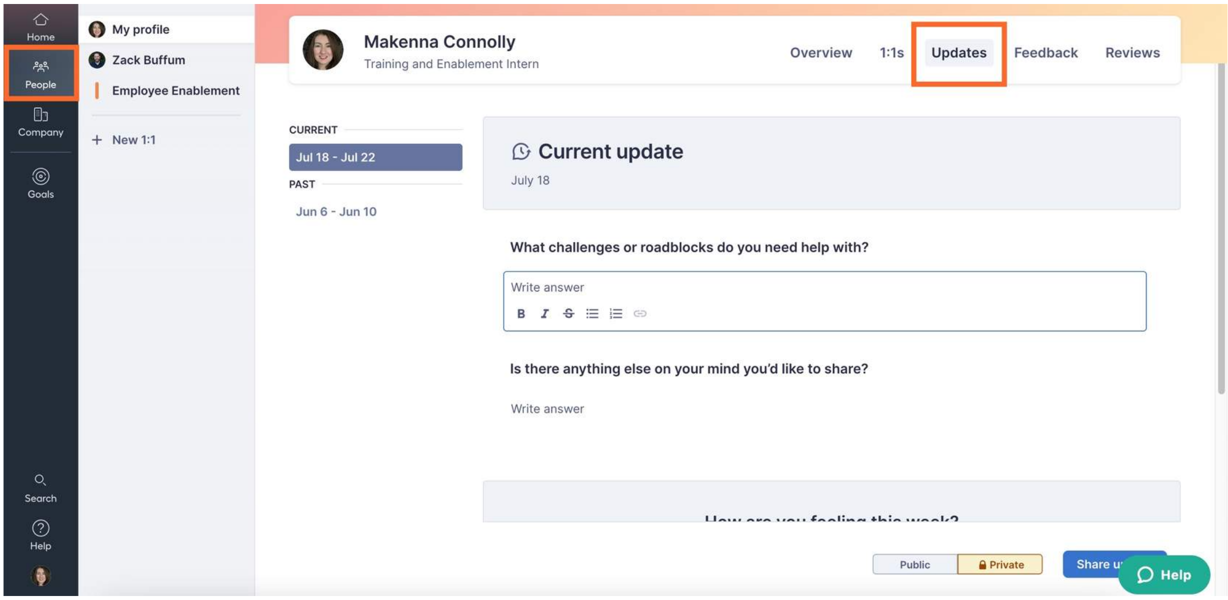
# Weekly Updates & 1:1s

## Weekly updates and 1:1 meetings

Updates are due every Friday in Lattice, and they are your opportunity to share what you accomplished and how you're feeling on a weekly basis.  Your 1:1 meetings with your manager are another weekly opportunity to share and receive feedback.

### Weekly updates

To share an update, click **People** on the left sidebar.  Click **Updates**, as seen in the image below.  Here, you will be able to see your current and previous updates.  Click the image below for a closer look at sharing your weekly updates.



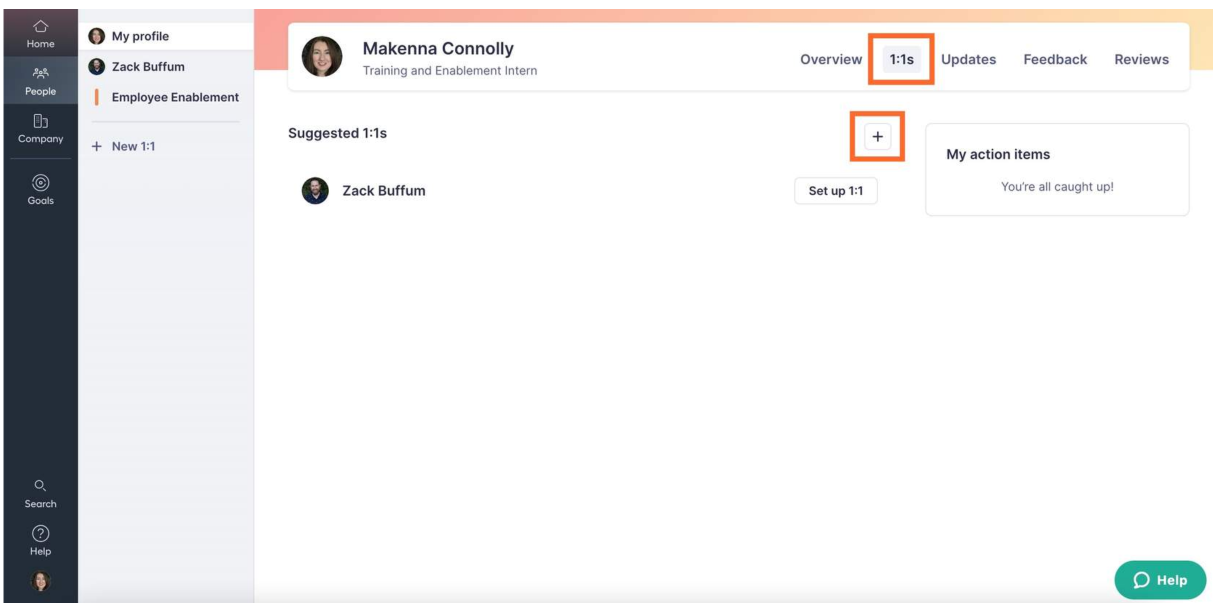
Note: Your updates are private between you and your manager. So, even if you switch teams, your past updates are not available to your new manager.

## 1:1 meetings

| CREATE A 1:1 RELATIONSHIP | PREPARE FOR A 1:1 | DEACTIVATE A 1:1 RELATIONSHIP |
|---|---|---|

To set up 1:1 meetings, click on **People** on the left sidebar. Then, click **1:1s**. On the **1:1s** page, click the **+** button, as seen in the image below. This will open the **Set up 1:1 relationship** menu. Here, you will need to select who your 1:1 will be with, how often you're meeting, and at what time.

Note: 1:1s don't have to be with just your manager! You can set up cross-functional 1:1s with anyone in the company, such as for weekly content syncs.

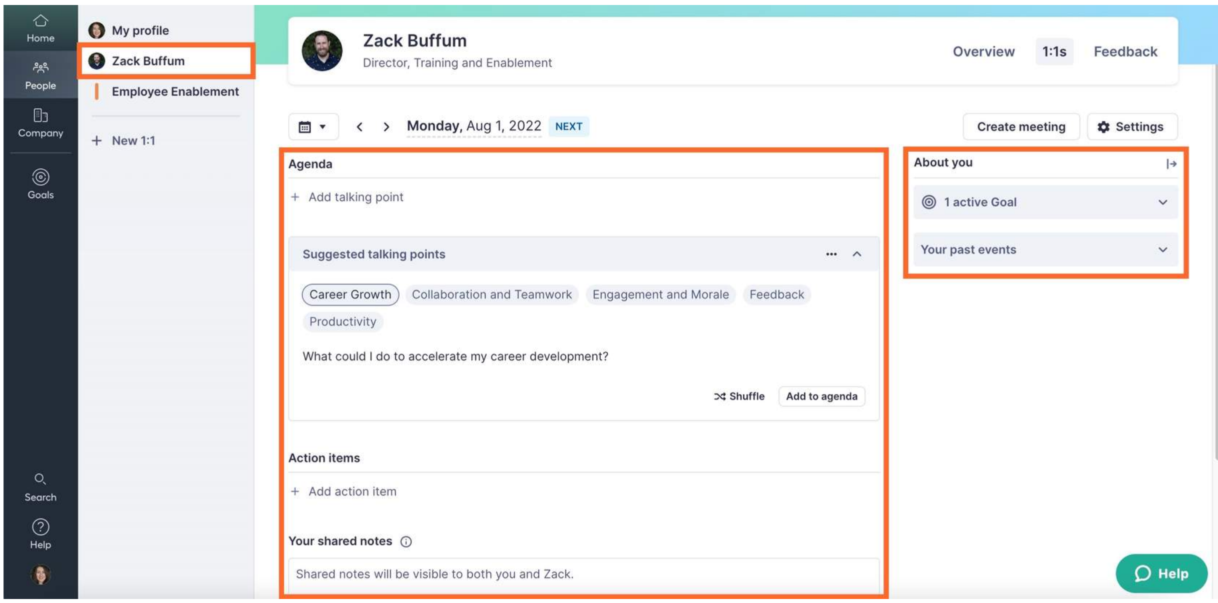


CREATE A 1:1 RELATIONSHIP

PREPARE FOR A 1:1

DEACTIVATE A 1:1 RELATIONSHIP

On the **People** page, click on your manager's name towards the upper left side of the page, as seen in the image below. You will be able to see a page for your upcoming 1:1. This page allows you to prepare for your 1:1. In the middle of the page you can add talking points, take notes, and more. To the right of the page, you can see any current goals you have and **Your past events**, which can include previous updates. Click the image for a closer look at preparing for 1:1s.



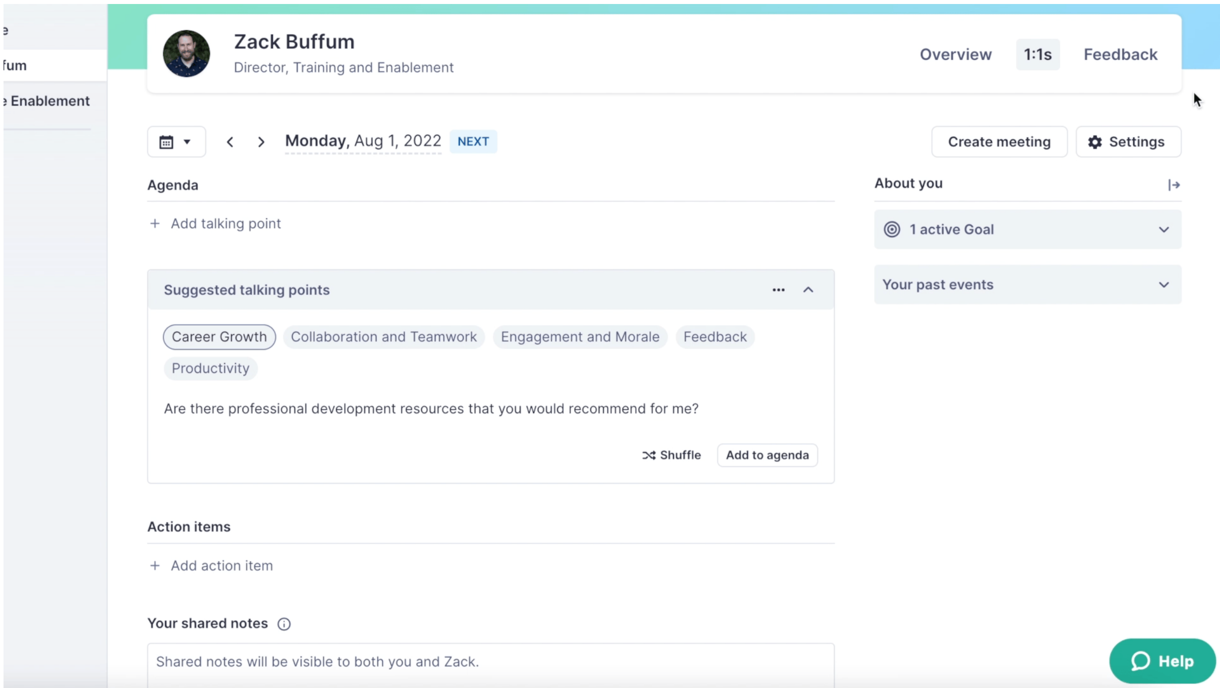

CREATE A 1:1 RELATIONSHIP

PREPARE FOR A 1:1

DEACTIVATE A 1:1 RELATIONSHIP

When you want to end a 1:1 relationship, such as with another colleague when you no longer need to meet, navigate to their page, which appears in the same place as your manager's. Click on **Settings** on the right side of the page, the same page for taking notes and preparing. This will open up a menu with information about the 1:1 relationship, as seen in the video below. On the bottom left corner of this menu, click the toggle that says **1:1s ON** to switch it to **1:1s OFF**. Click **Save**. This will deactivate future 1:1s in Lattice on that day and time with that person

Note: You will need to remove the event from your Google Calendar separately, Lattice cannot make changes, it only gets information from Google Calendar.

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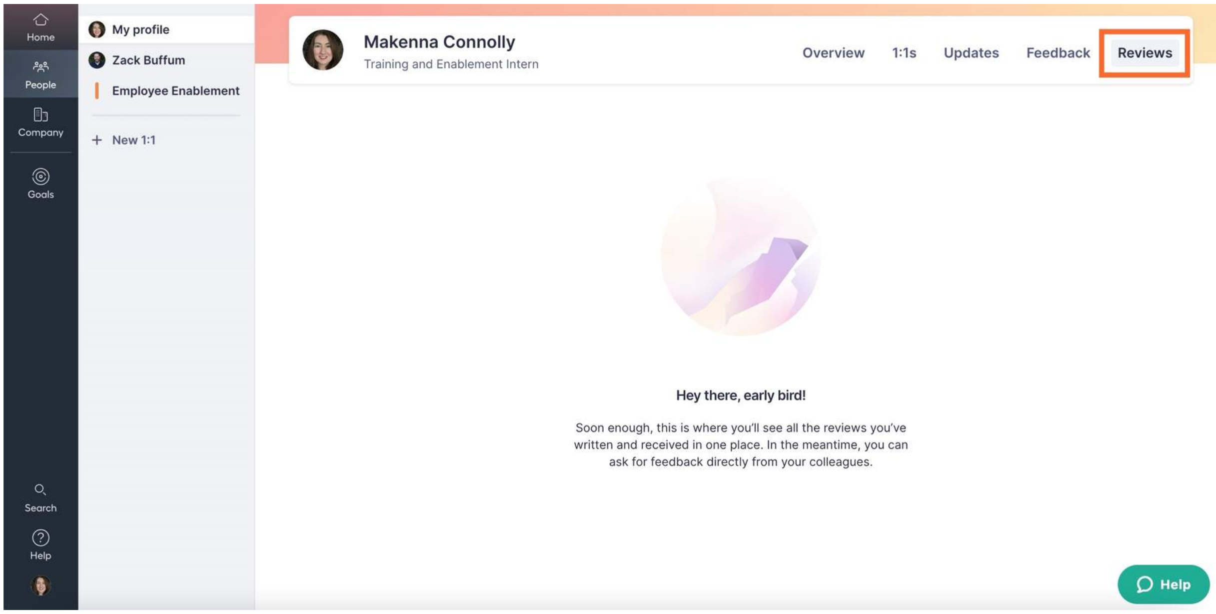
# Performance Reviews and Goals

## Performance reviews and goals

Performance reviews are another opportunity for you and your colleagues to help each other improve! Feedback from performance reviews can also help you set goals that support both your development and the growth of Shopmonkey.

### Performance reviews

Standard reviews are performed every quarter and are available for approximately two weeks after the end of the quarter. There are also new hire reviews, semi-annual peer reviews, and annual compensation cycle reviews. To see your reviews, go to **People** > **Reviews**, as seen in the image below. Something that can help you complete your review is the right-side menu that will display information, such as goals and feedback, as you're completing your review.




## Goals and key results

Another feature of Lattice is goals. Setting goals helps support your growth and the growth of the company. Goals can help support Shopmonkey operating objectives, which are key things that keep the business running, such as sales metrics. These objectives support themes, which are overall targets at the company level, such as curbing rejection and selling add-ons. So, by setting goals, you can contribute to these objectives and themes by continually improving in your role here at Shopmonkey! See the slideshow below for more information.

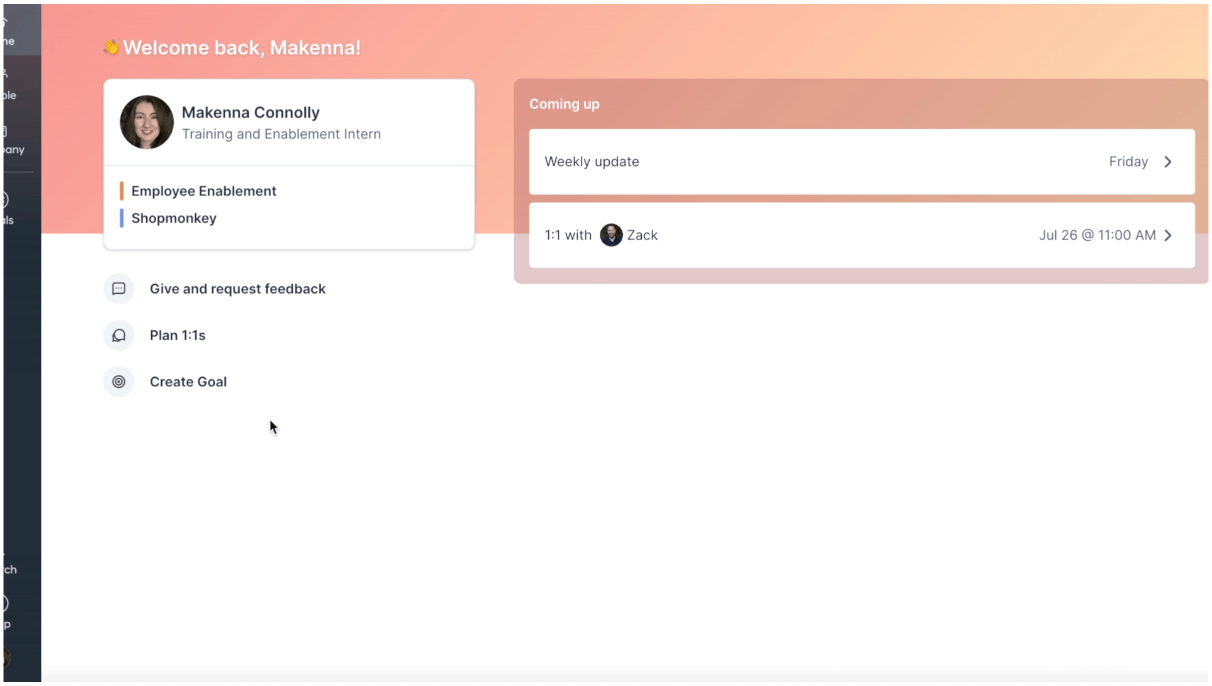
## How to create goals and key results

In addition to settings goals, Lattice also allows you to set key results.  Goals are what you want to accomplish, while key results are how you will actually accomplish your goals.  Goal setting for the following quarter happens in the last two weeks of the previous quarter.

Go through this slideshow to review the seven steps for creating, updating, and completing goals and their key results.

Step 1

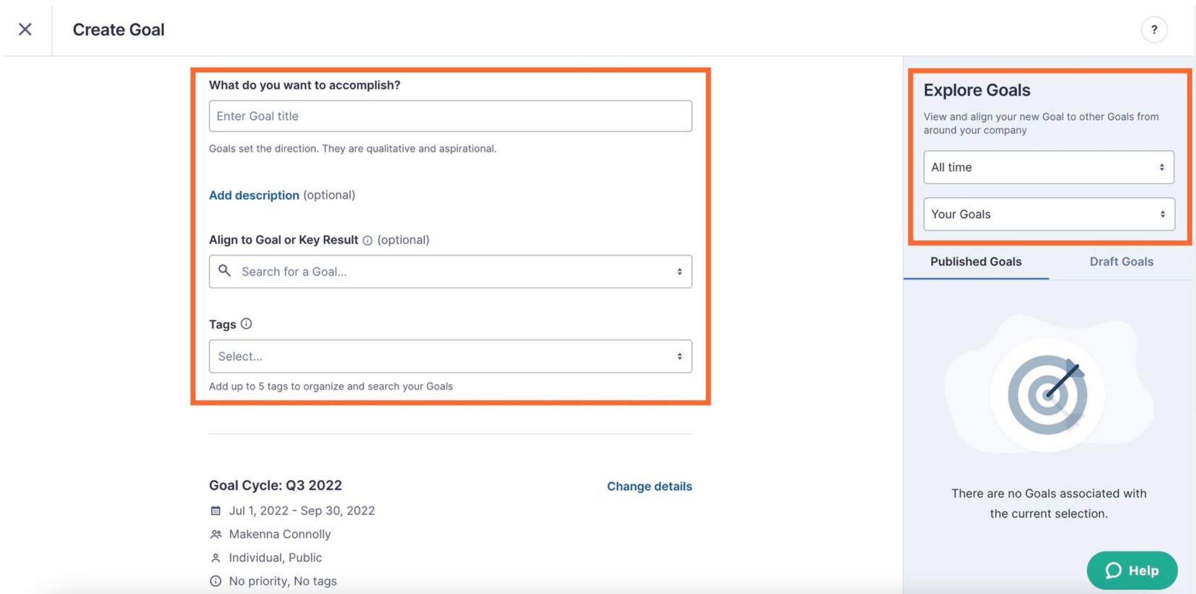
## Access the Create Goal menu




Click on **Home** > **Create Goal** > **Goal**. This will take you to the form where you can create your goal, as seen in the GIF above. Continue to the next steps to see what kind of information you can add to these goals.

Step 2

## Add required goal information

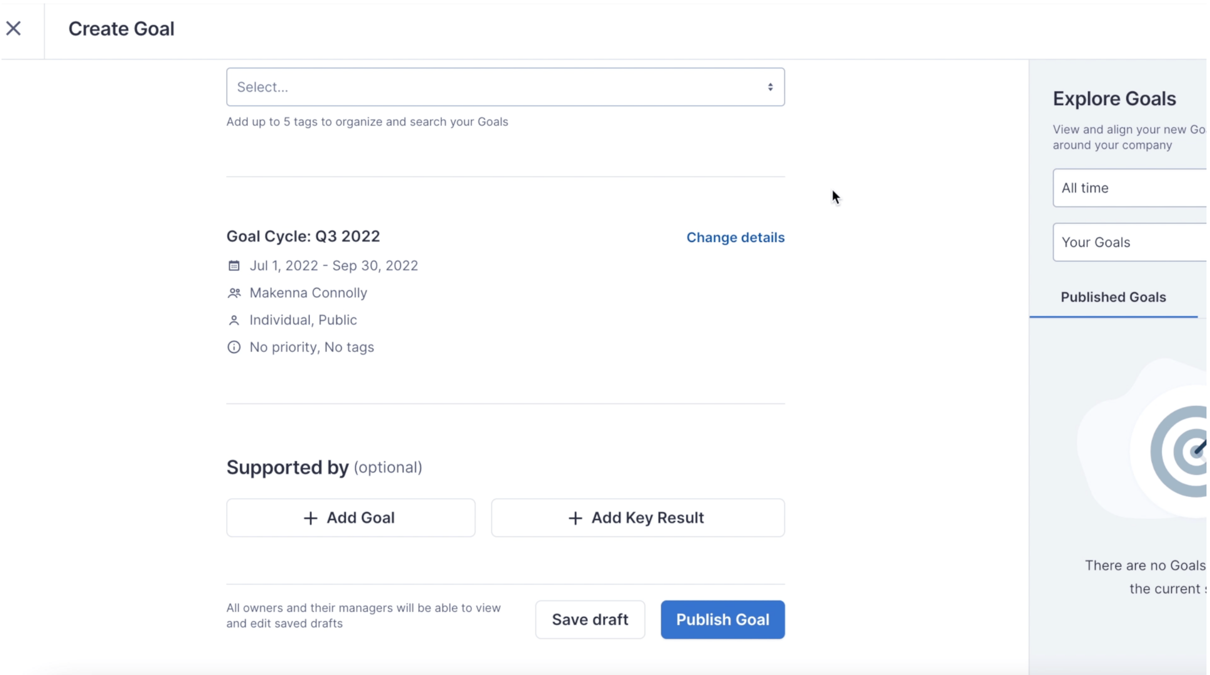



In the first main section of the form, as seen in the image above, you need to add a **Goal title** under **What do you want to accomplish?** You also need to add at least one tag under **Tags**.

On the right side of the form, you can use the **Explore Goals** menu to find some inspiration for your goals. You can search for goals from **All time** or from a specific quarter. You can also filter goals by **Your Goals**, **Company Goals**, **Tags**, and more.

Step 3

## Change goal details

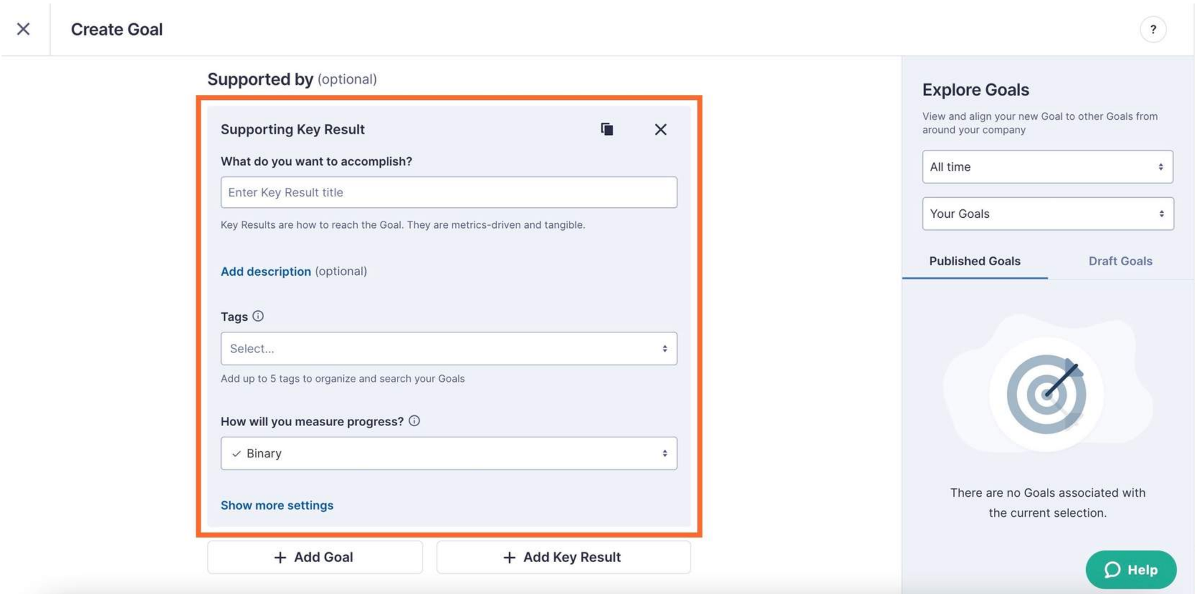



In the second main section, as seen in the GIF above, you can change the details for your goal. Click **Change details** to see this information, such as **Goal cycle** to change the quarter as well as **Due date**.

Note: **Public** is the default **Visibility** setting for goals. While we encourage you to create public goals for extra motivation and support, you can also set goals as **Private**.

Step 4

## Add key results



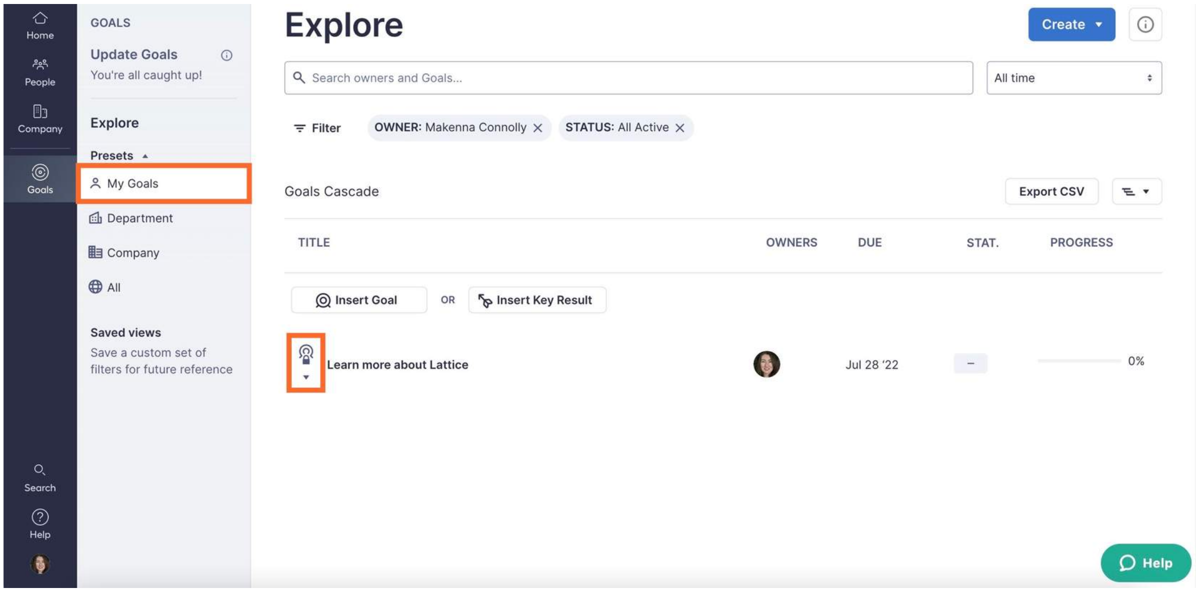

In the third and final main section, as seen in the image above, you can add one or more key results. Click **+ Add Key Result**. This will open the **Supporting Key Result** menu, as seen in the image above. Like goals, you will need to add a **Key Result title** and at least one tag.

You will also need to make a selection under **How will you measure progress?** The default option is **Binary**, which means you can only mark progress as complete or incomplete when you end the key result (see Step 7 for more information about completing goals and key results). The other options (**$ US Dollar**, **# Number**, and **% Percent**) will allow you to update your gradual progress before ending the key result.

At the bottom left corner of the **Supporting Key Result** menu, click **Show more settings** to see additional settings, including **Due date** and **Visibility**. Once you have finished adding the key result(s) to your goal, scroll down to the bottom of the form and click **Publish Goal**.

Step 5

## View your goals and key results



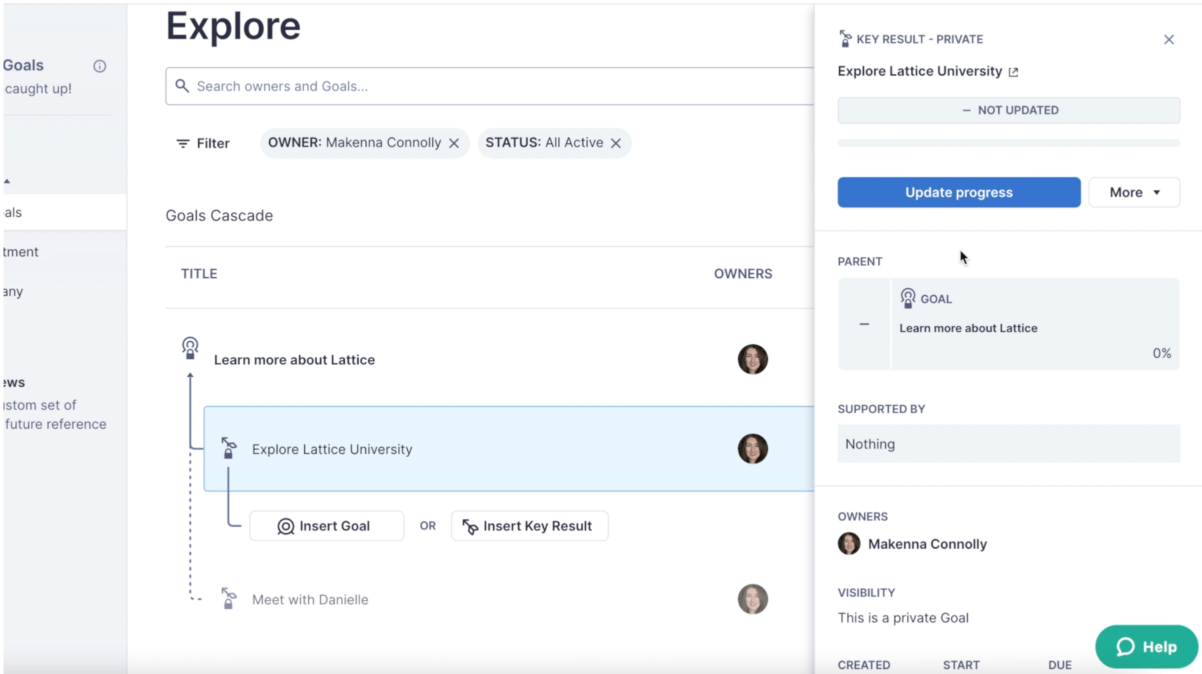

To manage your goals and key results, click **Goals** on the left-side menu. You will automatically be taken to the **My Goals** page, as seen in the image above.  To access any key results attached to a goal, click on the arrow below the target symbol, as seen in the orange box to the left.

Note: Goals have a target symbol and key results have an arrow symbol.  Any private goals and key results will also show a lock symbol.

HIGHLIGHT My Goals

Step 6

# Update progress for goals and key results

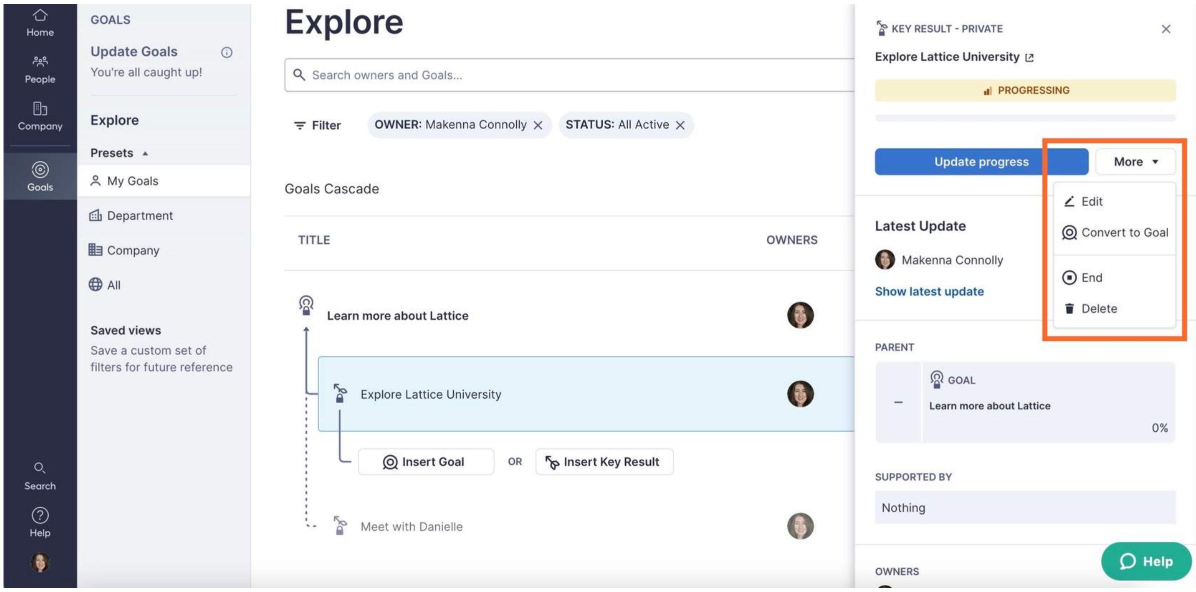



On the **My Goals** page, click on a goal or key result. This will open a right-side menu, as seen in the GIF above. Click **Update progress**. Under the **What's new?** section, write down what work you have done to accomplish the goal or key result. Then, under **Status**, select whether your progress is **On track**, **Progressing**, or **Off track**. Click **Post update** when you are done. You will be able to see the status updates and progress bar next to each goal and key result in **My Goals**.

Note: The GIF shows an update for a key result with a **Binary** measure of progress. For the other options, there will also be a **What's the new amount?** section where you will enter a numeric value to measure your progress.

Step 7

## End the goal or key result




When you are done with a goal or key result, click on it to open the right-side menu. Click **More**, as seen in the image above. Click **End**. You will then be prompted to select **Mark as complete** or **Mark as incomplete**. This will serve as a final status update.

Tip: To keep track of when goal setting, quarterly performance reviews, and engagement surveys are due, add the Shopmonkey Global Calendar to Google Calendar. To add the calendar, simply click here for the automatic prompt on Google Calendar and click "Add".

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# Surveys

## Surveys and compensation cycles

In Lattice, you can also complete surveys to share your opinion. These surveys will appear on your **Home** page as the task **Respond to a survey**. Your default notifications settings are set to also send you Slack and email notifications for surveys.

### Onboarding experience survey

After your first month at Shopmonkey, we ask that you complete a survey about your onboarding experience. This feedback helps improve the experience for future new hires!

### Employee engagement survey

Engagement surveys are anonymous and occur bi-annually. They allow you to share feedback so that HR and the executive leadership team (ELT) can determine employee satisfaction and identify areas of improvement.

**Tip: If you have any questions about how to use Lattice, make sure to visit Lattice University!**

CONTINUE

# The End!

## That's Lattice at Shopmonkey!

Thank you for completing this course! You learned how to give and receive feedback, submit updates and performance reviews, set up 1:1 meetings, set goals, and complete surveys. You are now ready to use Lattice at Shopmonkey!