Tradler

Empower your team

Playbook 2022

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Introduction

Hi there,
And welcome to our playbook!

We are excited to show you our world, but first, let´s set the stage.

You know what your business wants to achieve, but translating those goals into tangible actions that everyone in the company can understand and support is harder than it seems.

It's tough enough getting through the day-to-day tasks of running a business let alone trying to keep everyone motivated and working towards the same goal.
A lot of businesses try to solve this problem with complicated solutions that require a lot of time and effort to implement correctly.

Imagine being able to setup a platform that is easy to use, customizable and starts helping your business from day one. With Tradler, this is now a reality. In this document, we will show you how to easily configure the Tradler platform to fit your specific needs.

So what are you waiting for? Let's get your organization tradlin'!

Jasper Deprez
Founder & CEO @Tradler

Setting up a successful pilot

What problems are you facing and what needs to change to solve them? What is the root cause of them?
You first need to focus on these questions to determine what needs to be changed and measured.

What do you want to measure?

The most important part of the pilot is defining what you want to measure. Is there a new metric you want to implement? Do you prefer to focus on improving the current ones? Or are there any specific behaviors or actions you would like to drive in your team?

What you can expect

You will have full access to the platform where you will understand how your team is performing, the level of engagement they have...and celebrate every single achievement!

See the change

Before implementation, determine what success would look like for you (lower turnover, faster delivery times, improved customer satisfaction, engagement, etc.), and monitor how Tradler is getting you to these goals over time.

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Selecting the pilot group

Pilot group

It is important to choose the right group to participate in the pilot.

Choosing a team where there is something to improve or work on. Maybe you want to improve performance, implement new behaviors, improve communication between those working at home and those working at the office, enhance engagement of your team with the company, etc.

Once you identify the pilot group, consider the following:

01 The size of the group can be small or large, but we recommend a minimum of 15-20 participants.

02 The average age of the participants does not matter. The platform is easy and intuitive. In fact, the oldest participant is 80 years old!

03 The group or team must have at least one manager willing to work with Tradler. The engagement of the manager is crucial to the success of the pilot.

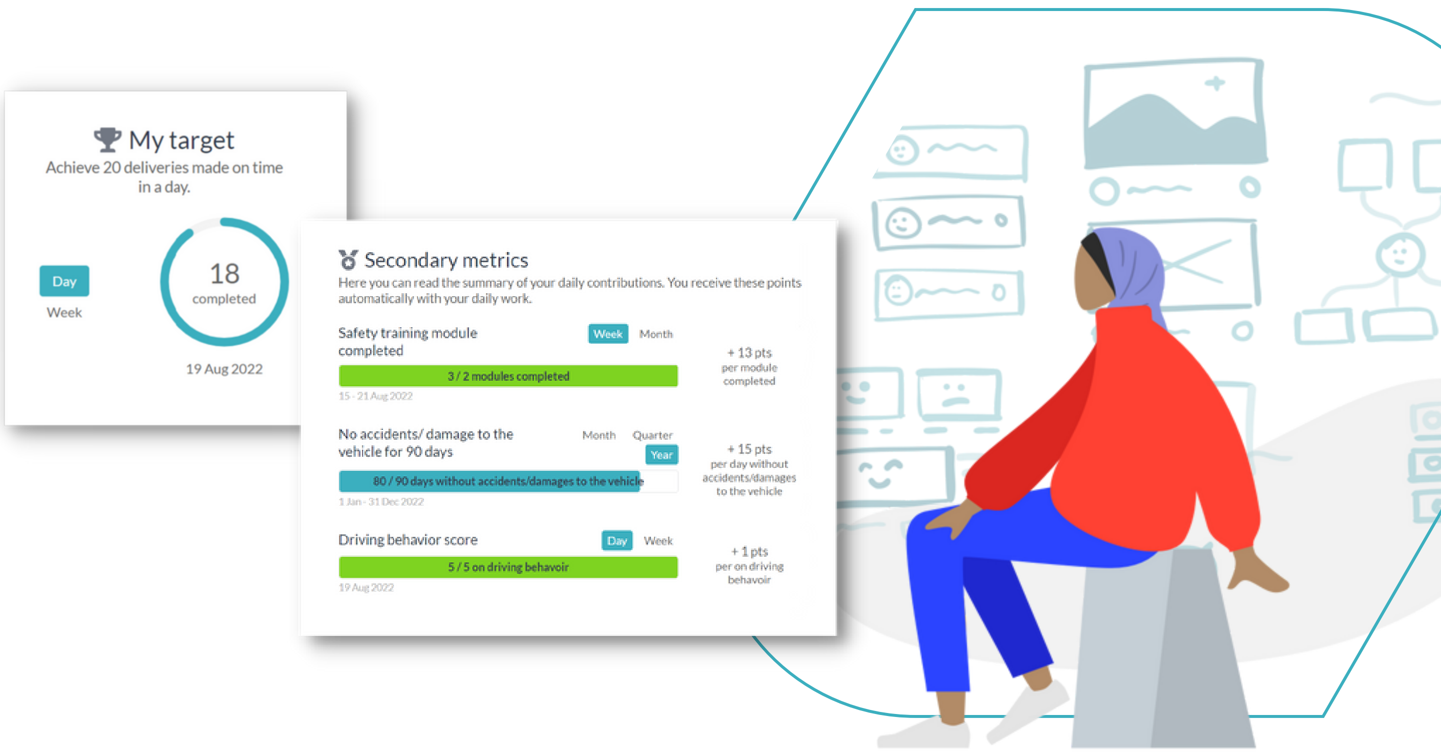
Metrics and milestones

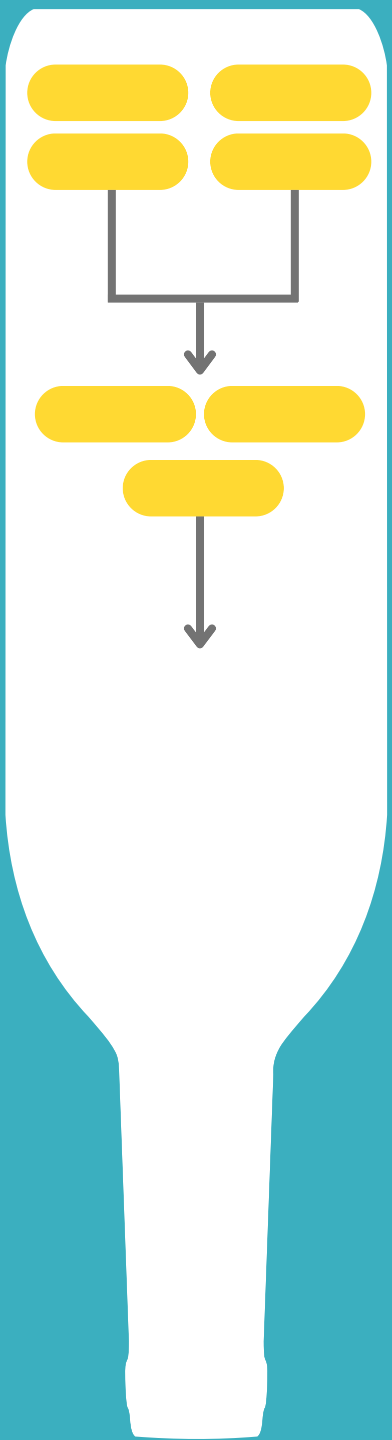
DRIVE BEHAVIOURS TO MAKE SURE YOUR TEAM FULFILLS THEIR OBJECTIVES

Metrics are the actions or results that are uploaded to the platform for each individual by which they can receive points and know how they are contributing to the team's goals. Setting the correct metrics in the platform is important, but they can be adjusted over time to make sure they stay relevant and you get the best results.

You will be driving behaviors with the metrics, so select the actions you wish to improve in your team. We suggest having no more than 4 metrics to make sure your team stays focused on just those behaviors or actions.

The first step is to think about what behaviors need to be reinforced. In order to make sure you are focusing on the right behaviors and actions, we recommend the following guidelines:





01

Define the objective with Tradler. What do you want to improve? Which metrics should your team focus on? Is there any specific issue you want to work on?

It's ok to have multiple objectives:

a.Improve the actual team metrics

b.Focus on some specific metric for a period of time

c.Start working with new metrics

d.Drive behaviors focused on topics of your interest (performance, sustainability, learning&development, etc.)

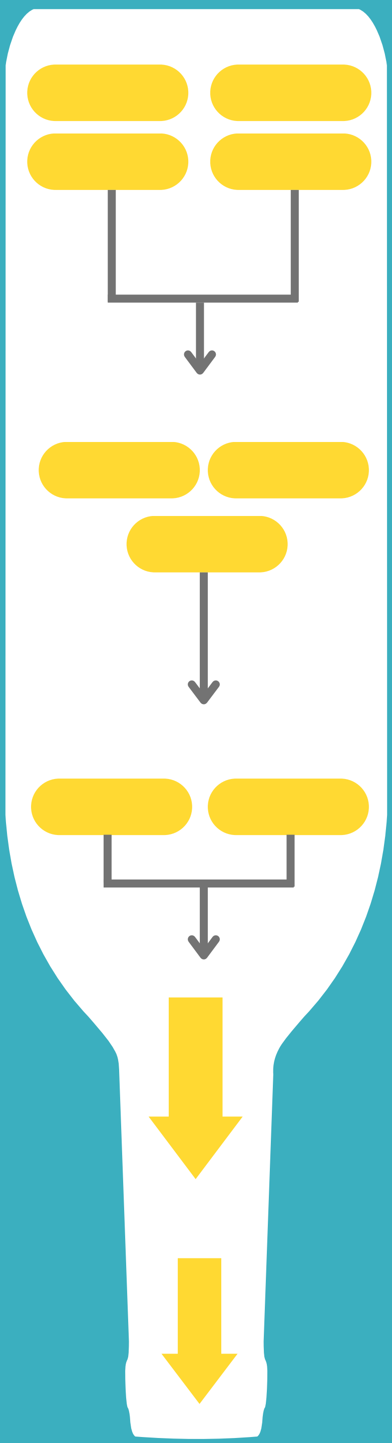
Objective: Increase the number of first-time deliveries

02

Define and describe the bottlenecks you are experiencing. What is keeping you from meeting your targets? Where is your project/job getting stuck?

To define the bottleneck, it is important to first understand and define the whole process your employees go through to achieve their goals. Then, identify at what moment of the process the work gets stuck or where they have more difficulties.

Example bottleneck: 30% of the people are not home when we deliver the orders, so we can't make first-time delivery and it slows down the whole process



03

What is really slowing down your process? Is it people or tools, or maybe external factors like suppliers or weather? Identify the actual bottleneck so you can fix it!

Factors: People not being at home when we are making a delivery.

04

Identify actions or behaviors you want to recognize for their importance in achieving the goals identified in the previous steps, no matter how small these behaviors may be. Maybe there is one certain action that needs more emphasis.

Actions: Celebrate when a driver makes calls to the customers before going to the next stop to check if people are at home.

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Rewards

DECIDE WHAT INCENTIVES YOU WANT YOUR TEAM TO EXCHANGE THEIR POINTS FOR

1. Choose the rewards:

Internal incentives are incentives that you can provide in your company (day off, cinema tickets, dinner, etc.)

These incentives are managed internally by you, which means that you have the Tradler platform to manage the orders, but you and the company are responsible for delivering the incentive.

To manage the orders, you need to:

1. Go to Manage page
2. Go to Gift management - Orders
3. Accept or reject the orders
4. You can also leave messages for the users in case there is something you need to communicate with them regarding the order

External incentives are rewards managed completely (both the order and delivery) by Tradler. Options include gift cards, donations and lottery tickets:

i. Gift cards: vouchers from various brands and stores. (applicable everywhere except the Antarctica)

...and much more!

External incentives:

ii. Donations: donations to different NGOs or even the CSR projects of the company. Users can also **suggest NGOs** they would like to have in the platform and we will reach out to them to ask if we can add them.

We now partner with more than 20 NGOs that users have suggested!

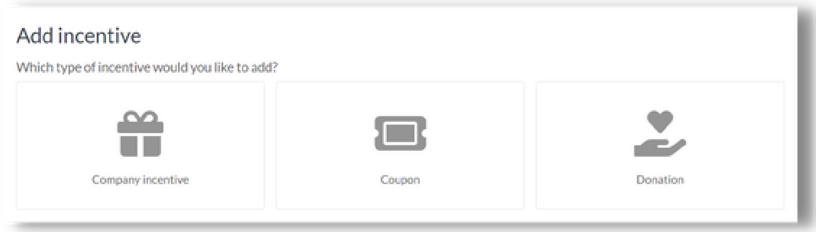
Non-monetary incentives. Teams can receive rewards in other forms than a direct monetary amount. These can be anything you can imagine, for example,

i. Offering classe
ii. Team breakfasts
iii. Time off to volunteer work
iv. Raffles for prizes*

*If you would like to organize a Raffle, please get in contact with us to give you the details of the process, You can now add all kinds of incentives to the platform by yourself.

To do that:

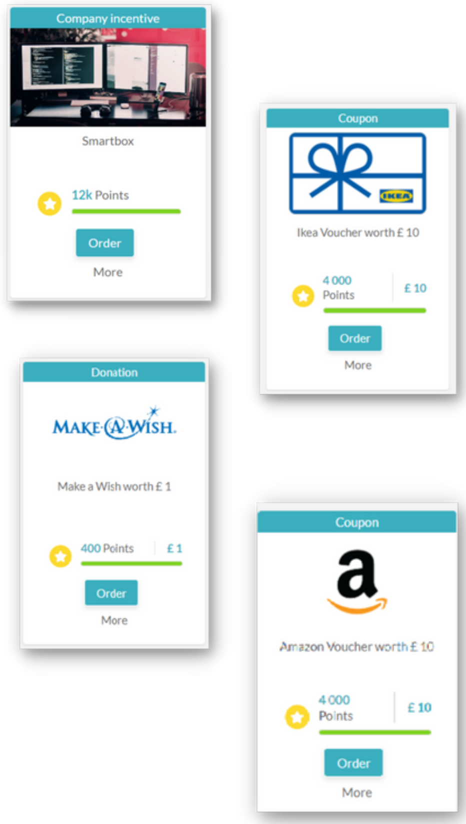
1. Go to manage
2. Go to Gift management - Gift options
3. Click on Add Incentive
4. Select if you want to add an Internal Incentive, a Coupon, Gift cards, or a Donation



If you are adding an Internal Incentive, you just need to fulfill the information that is required. You will have to manage the orders users make.

If you want to add a gift card, select the team(s) and then the provider (the coupon). You will see at the right how users will see this incentive.
Follow the same process to add a Donation.

The orders coming from Coupons or Donations are completely managed by Tradler. Choose the gift cards and NGO's you want and we will take care of the rest.



2. Consider your location and check the tax regulations for monetary incentives.

3. Decide the benefits budget: the amount you want to spend per person per year on incentives.

Data

COMPLIANCE, ONBOARDING & METRICS

Compliance	• We are ISO certified (ISO 27001:2017 Certified)
Onboarding	• To onboard users, we can link with your HR system to make onboarding easier and more convenient. This way, you won't have to update the user's list as it will be done automatically. • We can also upload the data manually, but keep in mind you have to add, delete or edit users manually every time. For this, we would need: email, external_user_id (employee number), external_org_unit_id (team), role_id (put 1 for managers and 2 for users), start_date (optional), leave date (optional)
Metrics: Data connection options	• Link to your API so that the platform updates automatically every time the system is updated. This can be applied to users and the data. • Use Zapier to connect Tradler to whatever system you use (e.g. Salesforce), so the platform updates automatically. • Add data manually by uploading a CSV file into the platform. This file needs to have a specific format (you will find a template on the platform). Data will only update once you upload your file, so if you upload it weekly, users will receive metric points once a week. • Export the data to our SFTP server, from which we will sync it to the platform. For some tools (such as Salesforce), this can be automated, for others, it requires creating an export script.

Communication plan

EFFECTIVELY COMMUNICATE WITH YOUR TEAM ABOUT TRADLER

It is very important to communicate that you will start using Tradler in your team. The communication needs to be done both to team managers and to users:

Managers

They are one of the most important parts of the pilot, so managers need to lead the way and use the platform correctly to make sure their teams are engaged. Team leaders should be involved in the setup process, and metric selection, and have a good understanding of the features and value Tradler can bring to their team. Communication with them should be done in two parts:

Email

Short email explaining the most important parts of the pilot and some of the manager's features:

- What is Tradler
- Why are we going to be using Tradler
- General info (who will be using it, when it will start...)
- Main FAQs

CHECK EMAIL TEMPLATE

Workshop

Workshop held by Tradler's team explaining how the platform works:

- Focus again on the What and Why
- How does Tradler work
- What are the most important things to consider as a manager (main features, 2 recs per person per week)
- QA

BOOK THE WORKSHOP

If your team is large or you have trouble finding one time that works for everyone, feel free to organize several workshops.

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Users

Send a short email introducing Tradler. This email doesn't have to be long.

- What is Tradler
- Why are we going to be using Tradler
- When will we start
- How it works

CHECK EMAIL TEMPLATE

When a team member signs up in the platform, they receive a short onboarding tutorial that explains the main functionalities.

Timeline

It is important to start the communication plan as close to the go-live date as possible to make sure the information is fresh in their minds.

Features

MANAGER FEATURES

Here we will explain the features available for managers in the platform and how to use them. But first, here are a few things you need to consider:

00 Roles and permissions

1. You can decide which features can be available in the platform for Team Managers and which not. This means that Team Managers may not see all these features in their accounts. We normally recommend activating the **Genie** and **My team** features, as those are the ones that give information about the teams' performance and engagement.
2. You can create different roles for different Team Managers. E.g. there can be one Team Manager in charge of the Gifts, so this person can have exclusive access to the **Gift Management** feature. The same can happen with engagement. If there's a Team Manager in charge of the engagement for the whole company, they can have exclusive access to the **Questions** feature.

Gift management & reports
Permissions granted as part of this role:
order_incentives.*.*, data_reports.view, incentives.*
Users who hold this role: 2

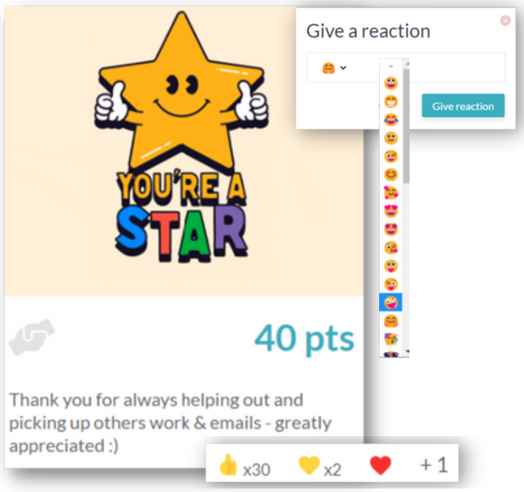
Project Manager
Permissions granted as part of this role:
engagement_questions.*, incentives.*, users.*, order_incentives.*.*, point_calculations.*, data_reports.view, data_upload, notifications.create, org_units.*, invites.*
Users who hold this role: 7

Engagement Manager
Permissions granted as part of this role:
engagement_questions.*
Users who hold this role: 1

This is a process we manage. You will have to indicate to us the Roles and Permissions you want to create.

Features

MAIN FEATURES



01 Recognitions

Recognitions are messages (and gifs) users and managers can send between each other (in all directions) to say thank you, recognize their amazing work, encourage them in difficult moments... or any other thing they would like to appreciate their colleagues for!

Users can give a reaction to the recognitions they receive to show their appreciation.

Users

Users will have a fixed amount of recognitions to give each other every month (e.g. 20 recognitions of 10 points per month). They can only recognize up to 5 people at the same time.

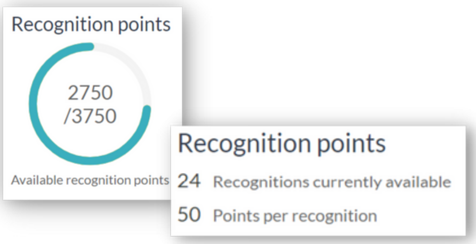
Managers

Managers have a fixed amount of points they can distribute as they wish (e.g. 1500 points per month). This amount depends on the number of people they have in their teams, so a manager with 30 people on their team will have more points than one with 10 people). Managers can recognize as many people as they want at the same time.

These numbers can be managed in the Allocation of points, explained here.

It's very easy to give a recognition!
Click Recognition at the top of the platform. Once there:

1. Add the colleague(s) you want to recognize
2. Select a gif
3. Write a personalized message
4. Click Give recognition



Features

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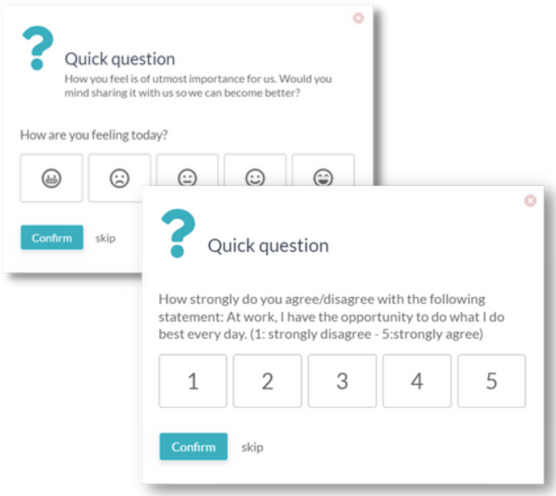


02 Engagement questions

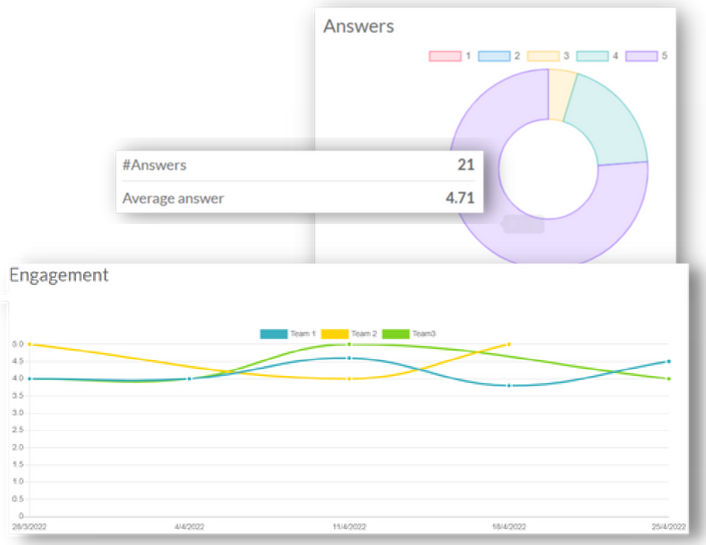
Engagement questions are shown to users whenever they login to the platform to measure how they are feeling and to get feedback about any issue or process.

They can be used to discover bottlenecks, know if people like a new tool, how they feel about a new process, to understand how appreciated employees feel in the company, and much more.

Managers will be able to see a breakdown on the results of the questions and the overall engagement over time per team and also per individual.

Managers are able to edit, add or delete questions to make sure they measure what is important at that moment:

1. In your profile go to Manage
2. Go to 'Questions'
3. To add a new question, go to the bottom of the page and click on Add question. To edit or delete an existing question, click on the corresponding icon at the right of the question.
4. Fill in the fields
5. Add the question or confirm the changes by clicking on Edit question.



Features

MAIN FEATURES CONT'D

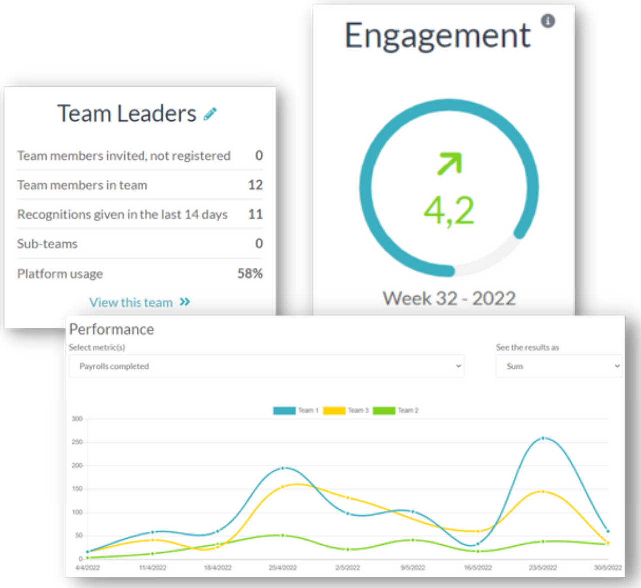
03 My Team & Team management

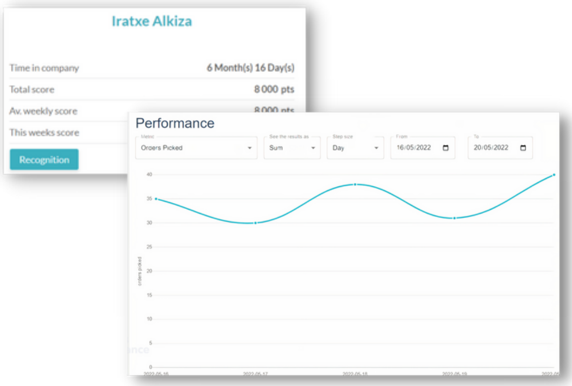
My Team.

Here, managers can see information about their teams:
Number of users, sub-teams, how they are answering the engagement questions, how they are performing on different metrics, and more.

Managers can also compare different teams' and individuals' information over time.

View specific teams to have a better understanding of each of them. Managers can access information on each user individually to understand their progress and situation.





You will also be able to see how many points you have given out and how many are left to give out before the points are reset.

In the **Team management** page, managers will be able to edit the teams:

- Create or delete teams
- Add users to existing or new teams
- Add managers to existing or new teams
- Update or create metrics to any team

Features

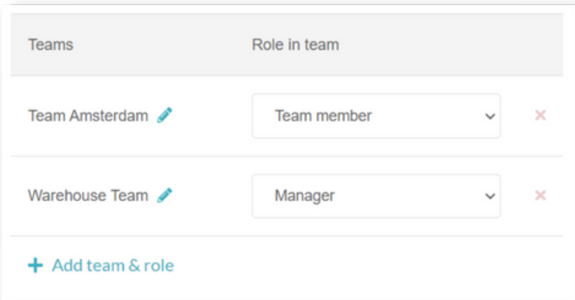
MAIN FEATURES CONT'D

03 Users

With the Users feature, you will be able to check and edit every user's information. You can also delete someone or add someone new to the platform.

IMPORTANT to consider when you **invite** someone:

1. Add a team and a role to this user. On the left part of the screen you will bee able to click on Add Team & Role.
    a. Select a team and then a role:
        i. Team member
        ii. Manager
        iii. Indirect manager (has the same view as the Manager but doesn't receive points to distribute)



2. Add an External ID to the user. This is usually the same number as the employee number. It is essential that you fill in this information as this is the way the user is linked to the data.
   If you are uploading the data manually, instead of using the user's name, you will have to use this number.
   In case we link our system to yours, the External ID of the user will have to be the same identification name or number you use in your system.

3. If you would like to celebrate your team member's work anniversaries, don't forget to include their Employment start date.

Features

MAIN FEATURES CONT'D

04 Targets & Metrics

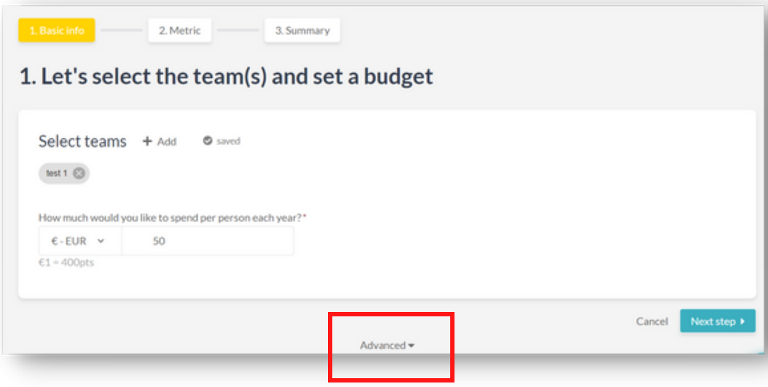
With this feature, you will be able to set up the metrics and targets of each of your teams. You can create different setups for different teams.

As explained in the chapter Rewards, you first need to decide the benefits budget (the amount you want to spend per person per year on incentives). The number of points each user receives will depend on this, so the bigger the budget is, the more points they will earn for their metrics and recognitions.
You will be able to manage this with the Allocation of points, explained below.

The conversion is:
1€- 400 points

Once you have the metrics and targets defined, follow these steps to add them to the platform:

1. In your profile go to Manage
2. Access Targets & Metrics
3. Click on Add Setup and then on Let's get started
4. Select the team(s) you want for this setup
5. Add the benefit budget
6. If you click on Advance (check the picture) you will be able to check and change the allocation of points



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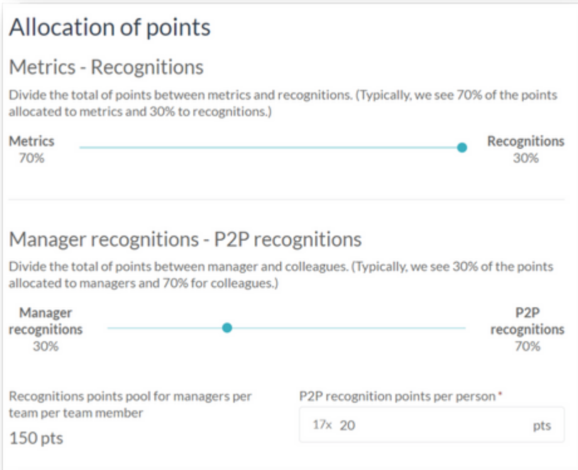
Features

MAIN FEATURES CONT'D

04 Targets & Metrics

Allocation of points - Here you can decide the split between recognitions and metrics.

We always suggest keeping 70% Metrics and 30% Recognitions.

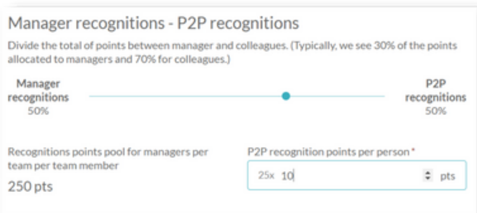


You can also decide if you want to give more value to the recognitions coming from managers or the recognitions that users give between themselves (P2P).

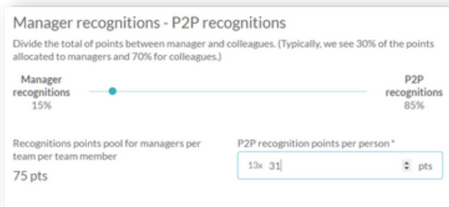
While moving the percentages on the Manager - P2P recognitions bar, you will see that the numbers at the bottom will change. These numbers reflect the number of recognitions either managers or users have per month to distribute.

We suggest keeping at least 20 P2P recognition points per person so that users can give at least 1 recognition per working day per month.

You can adjust to what fits your needs. Here are 2 examples of setups you could create:



Same importance to Manager and P2P recognitions. Users can give less recognitions but with more points.



Enhace P2P recognitions. Users can give more recognitions, but with less number of points.

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Features

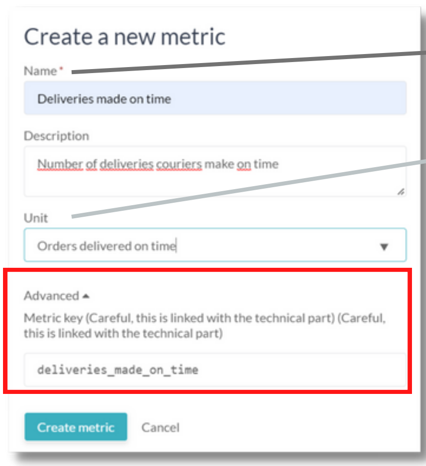
MAIN FEATURES CONT'D

04 Targets & Metrics

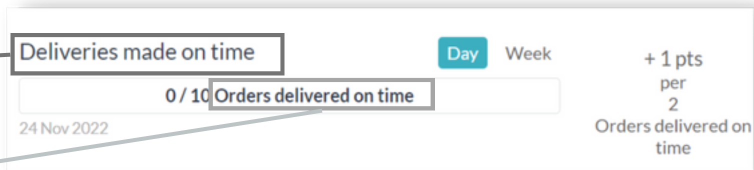
7. After setting the Allocation of points, click on next step
8. Start adding metrics to fill out the information. If you are creating a new metric, here are the various field definitions:

*The description of the metric doesn't show to the user.

Setup creation:



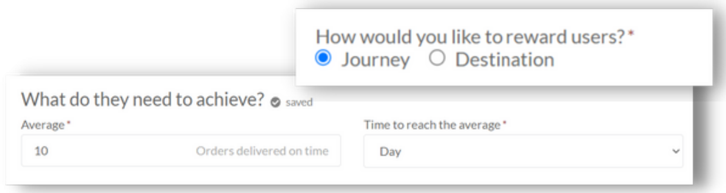
How the user will see it:



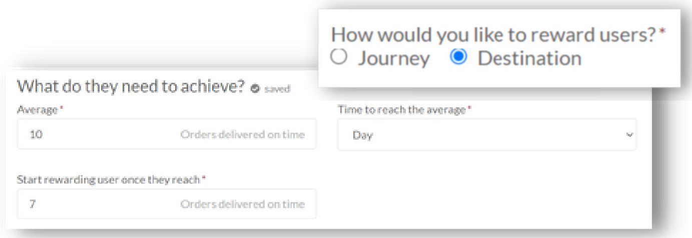
Important:
When adding a new metric, you will have to create the metric key. This is what links the metric to the data. Whatever metric key you use, you will have to use the exact same name (including spaces or special symbols) on the reporting to upload the data.

9. Decide how you want the users to earn points.

- Users can earn points per unit achieved



- Users can earn points only when they reach a certain number of units



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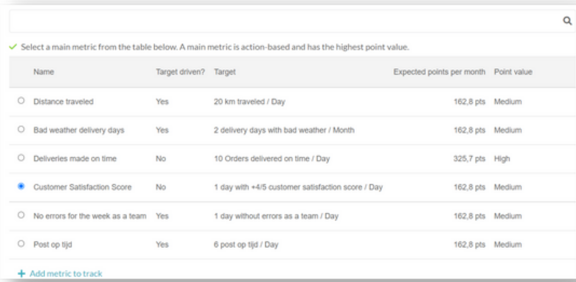
04 Targets & Metrics

You can adjust the importance/priority of the metric. If you want users to earn more points with this metric than the other ones, select High. If you want them to earn less points, select Low.



Select a main metric from the table below. A main metric is action-based and has the highest point value.

Name	Target driven?	Target	Expected points per month	Point value
Distance traveled	Yes	20 km traveled / Day	162,8 pts	Medium
Bad weather delivery days	Yes	2 delivery days with bad weather / Month	162,8 pts	Medium
Deliveries made on time	No	10 Orders delivered on time / Day	325,7 pts	High
Customer Satisfaction Score	No	1 day with +4/5 customer satisfaction score / Day	162,8 pts	Medium
No errors for the week as a team	Yes	1 day without errors as a team / Day	162,8 pts	Medium
Post op tijd	Yes	6 post op tijd / Day	162,8 pts	Medium

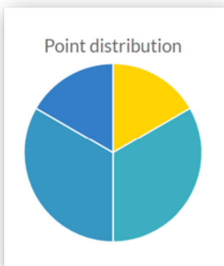
+ Add metric to track

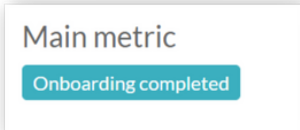
10. At the bottom, you will be able to see all the metrics. Don't forget to **choose the main one** by clicking on the circle at the left of that metric.
11. Click on Next step

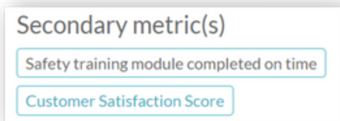
At this point, you will see that there are also some Tradler Metrics. These metrics are the ones setup by default in the platform and can't be deleted or edited.

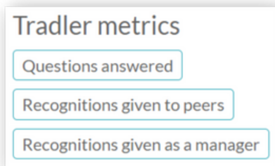
At any moment, you can edit/add or delete the metrics or targets, to make sure the setup is always covering your team's needs.

12. Verify that all the information is correct and click on Complete setup









Features

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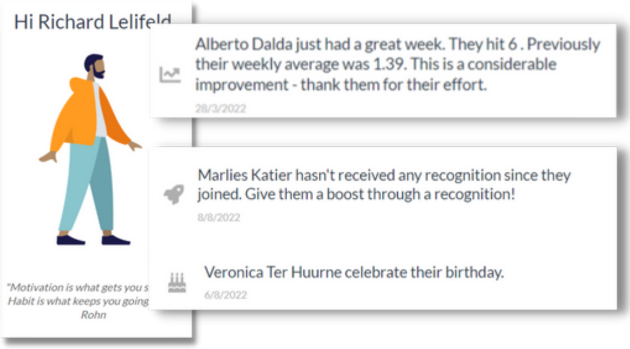


05 Genie

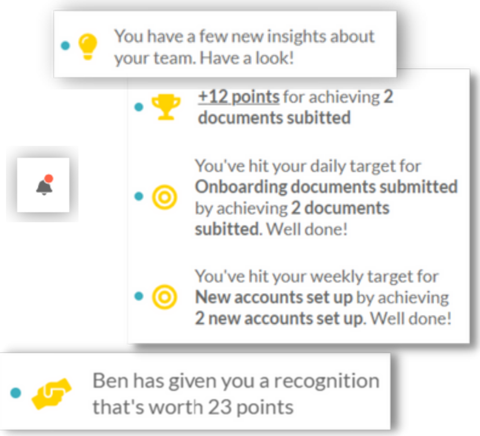
The Genie is a virtual assistant that gives important insights about your team.
Is it someone's birthday? Has someone achieved their goals ahead of time? Is someone not receiving recognitions? You just need to visit the Genie to learn what's going on.
The Genie will also give you ideas for recognitions. See if someone had an amazing week, or if their performance has improved in the last weeks and thank them for their effort.

06 Notifications

Notifications can be used to inform your team of reminders, the latest news, or anything else you want to communicate. Users and managers receive notifications about their performance improvements, the latest recognitions received, and more.

It's super easy to send a notification!

1. In your profile go to Manage
2. Go to ‘Notifications’
3. Select whom you want to send this notification to
4. Select the team or teams you want to notify
5. Write the notification
6. Add an action URL if you want to have the notification linked to some specific page or website
7. Send



Features

MAIN FEATURES CONT'D

07 Reports

Managers can download various reports to see the results of their teams' performance, the points received by each individual, the incentives ordered in the last month, and more.

To create/ download a report:

1. In your profile go to Manage
2. Go to ‘Reports’
3. Select the report you want to download
4. Add the start and end date
5. Download the report

If you can't find the report you are looking for, you can always send us a support message!

08 FAQ & Feedback messages

Users and managers have access to the FAQ page where they will find answers to the most common questions. There is also a place to leave feedback that will arrive directly in our support email inbox.

To access the FAQ page, scroll to the bottom of the page, and on the left-hand side, you will see the button, FAQ. Users and managers can go back to the tutorial in case there is something they don't remember.

Features

BEST ORDER TO SET UP THE PLATFORM

For the best results, set up the platform in the following order:
*The order is important because each step builds on the previous one.

01 Create the team(s)

02 Setup the incentives

If there's going to be a specific person managing the incentives, you should invite that person/s to the platform before this step.

03 Create the Engagement question

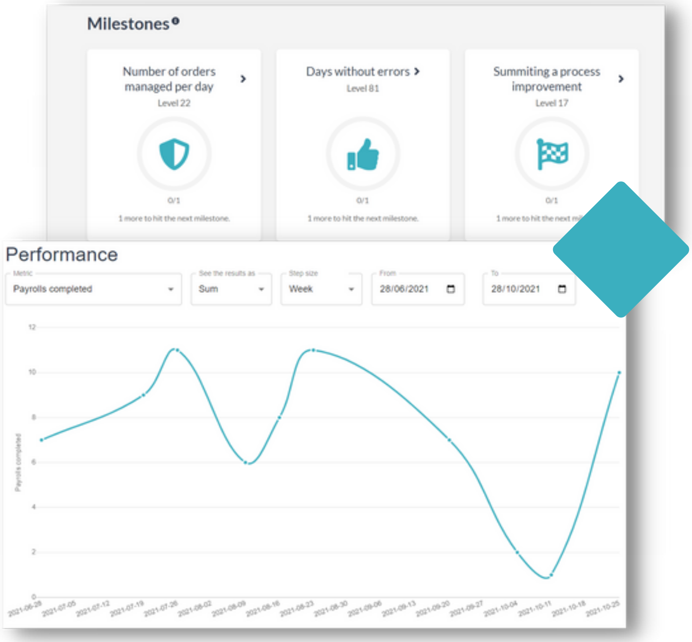
If there's going to be a specific person focused on the Engagement, you should invite that person/s to the platform before this step.

04 Setup the metric(s) for the team(s) created

05 Add users and team managers

Personal settings

PERSONAL PROFILE PAGE



Access the personal profile page by clicking the name in the top right corner of the screen and selecting **My Progress** from the dropdown to check:

1. Milestones
2. Performance graph

Select **Settings** from the dropdown to:

1. Edit personal information
2. Edit Language and Location
3. Turn off email notifications for Recognitions and Milestones
4. Deactivate account

What happens when someone deactivates their account?

They are soft deleted for 30 days, so the data can be recovered in case there has been some error. After 30 days, the account is hard deleted and the information can no longer be recovered, as everything related to that account gets anonymized.

Scaling post pilot

Once the pilot has run for 3 months and the results are evident, you can scale Tradler.

These are the steps we should take to make it happen:

01 Decide if you want to scale to just one team, multiple teams, or the whole organization.

02 Understand the situation of each team to decide where Tradler can help (improving the actual metrics, introducing new ones, driving specific behaviors, etc.)

03 Define what you want to measure in each team.

04 Create the setup for each team in the platform.

05 Work on the communication plan to make sure everyone is aware of Tradler and when it will go live.

Questions?

Get in touch

For general questions you can reach
jasper@tradler.co

If you are a customer and need support you can reach
iratxe.alkiza@tradler.co

For partnership related questions you can reach
paul.lloyd@tradler.co

www.tradler.co

MANAGERS

Hi Everyone,

I hope you are as excited as we are! This week and next week we will be onboarding everyone. Your team members will receive their personal invitation email to join the Tradler platform.

In this email, you will find some of the frequently asked questions as well as last-minute tips
and tricks.

Questions and answers:

Onboarding/user management

- My team member says they have not received the invitation email yet.
Response: It might be that the email ended up in the SPAM folder, so we recommend the user look there. You can also see in your manager's view if a team member has been invited (Team members who have been invited, but not yet signed up will appear in light grey).

- My team member is not invited yet, how do I invite them? / How can I delete a team member?
Response: You can invite or delete a user from the Users tab on the Manager view. Just click on "Invite user"; to invite a new team member or click on the "Delete" icon next to the name of the user you wish to delete. If you do not have access to Users, you can contact:____@CLIENT

- My team member changed teams, how can I adjust this?
Response: If you want to move a user, go to the Team Management tab on the Manager view. You can create and delete teams, and also add and delete users from the teams. If you want to change the team a user belongs to, remember to delete them from the old team and add them to the new team. If you do not have access to Users, you can contact: ____@CLIENT

Points / recognitions

- How many points can I give to my team members?
Response: As a manager, you receive xxx points per registered team member per month. If you are managing a team with multiple managers, then the xxx points per registered person will be divided between the managers.

- What do I need to do if I have no recognition points left?
Response: First of all, great work! Recognition points reset at the beginning of every month, so next month you will have points again to spend.

TIP: We recommend using a smaller amount of points per recognition and to give on average 2 recognitions per person per week. This is extremely important in the first 2 weeks as this will drive the usage of Tradler across your team.

- What can I give recognition for?
Response: You can give recognition for whatever you want, we recommend having a look at the genie in your manager's view to get inspiration. The genie will provide you with daily insights.

Data and metrics

- When do people earn points? (LAUNCH)
Response: People only earn points once they make an account, we are not able to add points retroactively for people if they waited to onboard. We will upload the data for the first time on xxxx. Everyone who has not been onboarded by that time will have lost the potential points of that day.

- When do people earn points? (post-launch)
Response: There is a daily report sent to Tradler which will update the points. you can expect this report to be uploaded within 1 hour after we've received the report.

Gifts

- Can I add incentives myself?
Response: Yes you can, in your manage section, you will find gift options on the left. You can add any gift for your team you want. It is important to select the team to whom you want to add the incentive. If not, you will add the incentive for everyone in the organization.

- How does my team member receive their gifts?
Response: In the case of an incentive you've created yourself, you are responsible for the delivery. You will receive an email notification when somebody orders one of these incentives.

As always, if you have any questions or concerns feel free to reach out to me directly.
Kind regards,
Tradler team

USERS

Hi Everyone, Great news! From XX/XX/2022 the new online platform Tradler - https://XXXXX.tradler.io/ will be available. You are the lucky ones who will be able to start accumulating points from now on!

What is Tradler?

Tradler is a platform that allows you to get recognized for the work you are doing when you are doing it and share recognitions between colleagues. You are able to earn points and exchange those points for gifts.

Why do we use Tradler?

We want to get better at recognizing you for your daily contributions! We want to make sure that we are in better connection with each other.

How does it work?

Based on your daily activity, you will automatically earn points that you can exchange for gifts! On XX/XX/2022 you will receive an email with an invitation to create the Tradler account.
IMPORTANT: Only after you have created your account can you start earning points. Every day you wait to make an account, you technically lose points you could have earned, so be sure to create it!

How do I earn points?
Simply continue doing your daily activity as you are already doing today. Every day during the morning, your activity data from the previous day will be uploaded to Tradler automatically and according to your results, you will earn points and can level up!

Your feedback

As Tradler is still in the pilot phase we are very keen to get your feedback. Currently, we are only testing the solution and with your feedback, we can make it even better!

Best of luck saving points!
Enjoy!
Tradler team