



LVL UP PERFORMANCE
CUSTOMER WELCOME GUIDE

12 MONTHS OF PERFORMING ACCESS

Welcome to your Performing year.

A practical, human-first guide to launch your company, invite every employee, and create a performance rhythm your team can actually use.

YOUR FIRST MOVE

Open the private offer link shared with this guide.

Your code may be prefilled. Create the company account first; invite employees

OPEN LVL UP



Scan to open LVL Up

A complimentary year is activated only through the private offer link or code supplied with this guide. No private code is printed here.

Three easy ways to onboard employees

Show all three on first login. Choose one primary path, then mix methods only when it helps.

01

Quick invite

BEST FOR A SMALL TEAM

Paste names and work emails. LVL Up prepares every invitation at once.

- ✓ Fastest start
- ✓ Names are optional
- ✓ Edit roles afterward

02

Import a spreadsheet

BEST FOR 10+ PEOPLE

Upload CSV or Excel from your HR system or use the included template.

- ✓ Maps common columns
- ✓ Departments + managers
- ✓ Review before launch

03

Add individually

BEST FOR DETAILED SETUP

Set each employee's role, department, and manager before inviting them.

- ✓ Maximum control
- ✓ Ideal for leaders
- ✓ Great for exceptions

DO WE USE ALL THREE?

Yes - when it fits the company.

Start with one primary method. Use the others for leaders, late additions, or missing data. Nothing is emailed until the company reviews the list and launches the workspace.

Your first 20 minutes

A calm, four-step setup. Save detailed policies and advanced configuration for after launch.

1

Activate your access

Open the private offer link, create the company account, and confirm the Performing offer is applied.

2

Build the company shell

Add the company name, industry, size, departments, job levels, and reporting structure.

3

Choose how people enter

Quick invite, spreadsheet, or individual entry. Pick one primary path for speed.

4

Review, then launch

Check roles, managers, departments, and invite choices. Only then send invitations.

KEEP THIS SIMPLE

A strong launch beats a perfect setup.



Invite a pilot group first if the company is large.



Give managers 10 minutes of context before employees join.

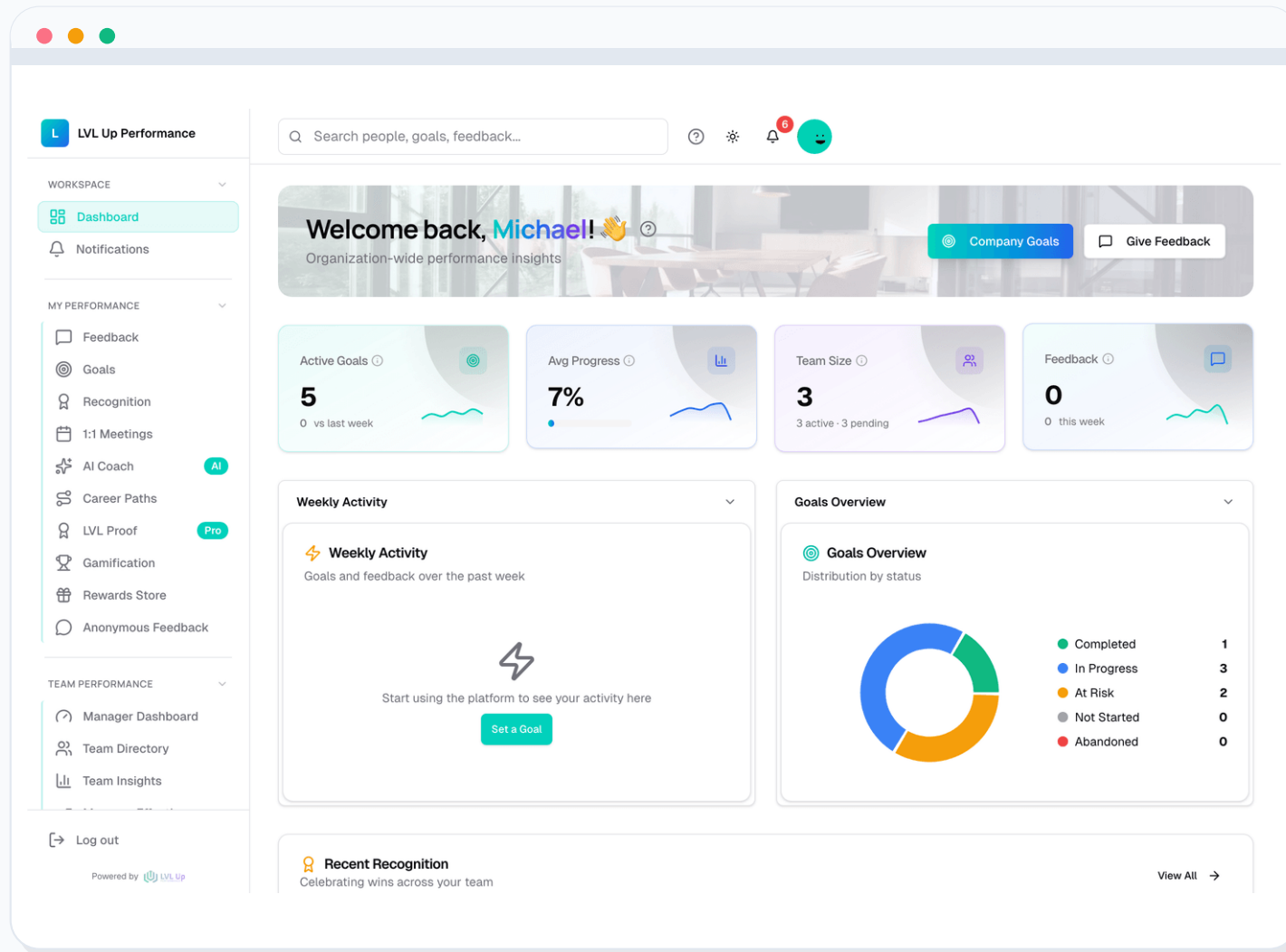


one real company goal so the
ace for the LVL Up

Use the private offer link.

One dashboard, one shared view

Start each week here: check goal movement, team activity, and the actions that need attention.



WHAT TO NOTICE

1 A clean starting point

Key signals and shortcuts are visible immediately.

2 Goals stay visible

Company priorities remain part of the weekly conversation.

3 Action is close

Give feedback or move into goals without hunting through menus.

A team directory that is ready to work

Confirm departments, managers, access, and employee status before building performance programs.

The screenshot shows the LVL Up Performance Team Directory interface. On the left is a sidebar with navigation options: Workspace (Dashboard, Notifications), My Performance (Feedback, Goals, Recognition, 1:1 Meetings, AI Coach, Career Paths, LVL Proof, Gamification, Rewards Store, Anonymous Feedback), and Team Performance (Manager Dashboard, Team Directory, Team Insights). The main content area has a search bar at the top. Below it is a 'Team Directory' header with buttons for 'Org Chart', 'Import CSV', and 'Add Team Member'. A summary row shows 3 Team Members, 1 Department, 1 Manager, and 0 New This Month. Below this is another search bar and a table of team members. The table has columns for Employee, Department, Contact, Joined, Status, and Actions. Three team members are listed: Kristen Martinez, Mauricio Fernandez, and Michael Johnson, all in the Executive department and Active status.

Employee	Department	Contact	Joined	Status	Actions
Kristen Martinez Chief Operating Officer	Executive	kristen@lvlupperform...	Aug 2025	Active	...
Mauricio Fernandez Chief Technology Officer	Executive	mauricio@lvlupperfor...	Aug 2025	Active	...
Michael Johnson Chief Executive Officer	Executive	michael@lvlupperfor...	Aug 2025	Active	...

WHAT TO NOTICE

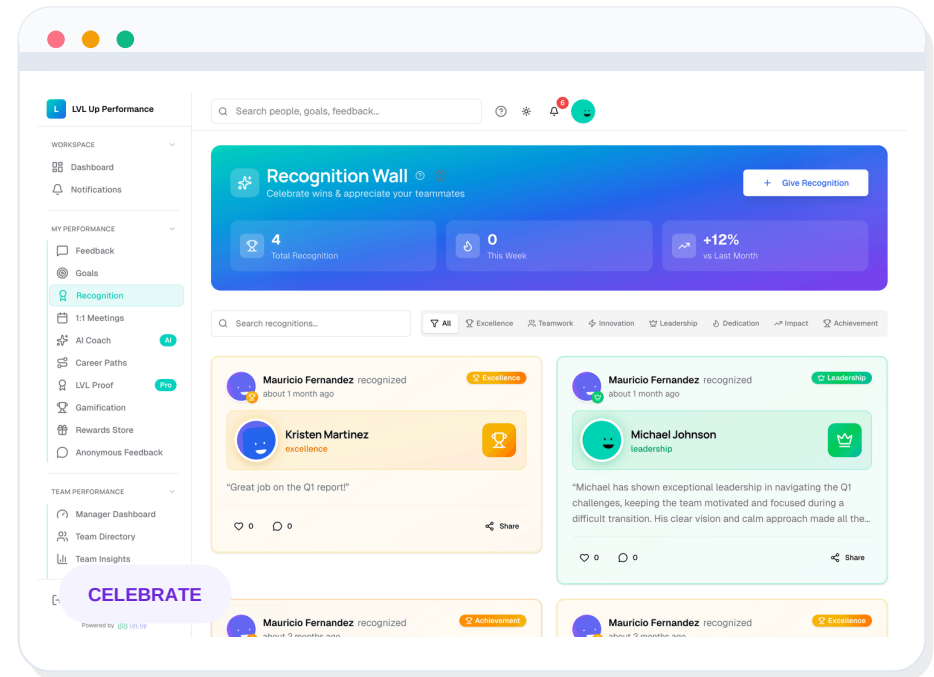
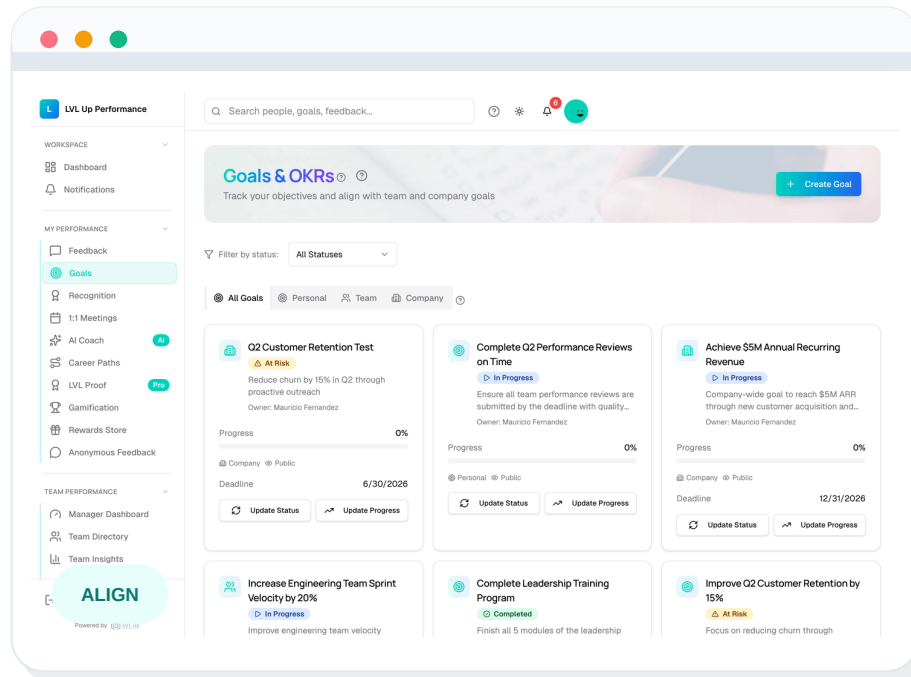
- Choose the right import**
Quick invite, spreadsheet, and individual entry all feed one directory.

- Check structure**
Departments and managers create useful context for goals and reviews.

- Invite with confidence**
Review the full list before the workspace sends invitations.

A performance rhythm people can feel

Goals create clarity. Recognition reinforces progress. Use both from week one.



Set one company goal

Make the first goal specific, owned, measurable, and visible to the team.



Ask for one update

A small weekly progress update teaches the habit without creating process fatigue.



Recognize one real win

Public, specific recognition shows the team what excellent work looks like here.

KEEP IT CLOSE

Help when and where you need it

Use in-product help for the current page, or open the full documentation hub for deeper guidance.

IN THE APP

Page-level guidance

Look for the help entry connected to the page you are using. It gives the shortest route to the right task, permissions, and next step.

- ✓ Context for the current page
- ✓ Links back to full documentation
- ✓ Designed for fast answers

FULL DOCUMENTATION

Browse, search, and export

Use the documentation hub for complete workflows and shareable reference material.

OPEN DOCUMENTATION

www.lvlupperformance.com/docs

NEED A HUMAN?

We are here to help your launch land well.

Questions about setup, migration, or the offer? Email support and include your company name.

support@lvlupperformance.com

Your first 30 days

The platform matters. The cadence matters more. This rollout keeps momentum high and admin work light.

WEEK 1 Set the foundation	WEEK 2 Bring everyone in	WEEK 3 Coach the cadence	WEEK 4 Learn and adjust
✓ Finish company structure ✓ Invite managers or a pilot team ✓ Publish one company goal	✓ Send remaining invites ✓ Ask for a first goal update ✓ Give first recognition	✓ Hold manager check-ins ✓ Resolve access questions ✓ Review early participation	✓ Review analytics ✓ Celebrate adoption wins ✓ Choose next month's rhythm

YOUR PERFORMING YEAR

Unlimited people. One shared performance rhythm.

Performing brings together goals, feedback, recognition, reviews, analytics, AI coaching, integrations, and priority support.

[OPEN LVL UP](#)

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