



**Head
Light**

The Good Practice Guide to Embedding Continuous Performance Management

part of our White Paper series

The Talent Cloud Platform

Developing Skills. Encouraging Performance. Boosting Recognition.



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Why a Good Practice Guide is Needed

A Changing World of Performance Management

Performance Management practice has shifted. Back in 2016, Kinley¹ identified two main changes taking place: the end of forced ranking in rating people's performance and the move towards more frequent and less formalised review conversations.

One year later and [Deloitte's 2017 Global Human Capital Trends report](#) reported on the acceleration of the evolution of performance management. 79% of executives rated the need to transform performance management as a high priority (up from 71% three years previously) – and 38% called the problem “very important.” The report also highlights the move to retrain leaders to implement agile, development-focused management approaches. And it pays off. Of those that make the change, 90% see direct improvement in engagement with the process, 96% say the review processes are simpler, and 83% report an increase in the quality of conversations between employees and managers.

A More Personalised and Engaging Approach to Performance Management – With Real Business Benefits

The [2019 Gartner Performance Management Benchmarking Survey](#) showed that 81% of HR leaders were looking to making changes to performance management, primarily focusing on the most common of complaints; the process is too onerous and time-consuming.

But such a focus is too narrow. Improving performance management is not about speeding it up and making it easier to complete. We need to focus more on the utility and value that comes from putting goal progress and achievement at the core of on-going manager-team member conversations. As Jeanine Prime, Vice President, Team Manager, Gartner comments in the report:

“While HR, line managers and employees have felt the burden of performance review in the past, we believe that by focusing on stronger engagement with and utility of what needs to become a regular, on-going and more integrated with working practice, the benefits will be seen”.

[Research](#) shows that for organisations in which the utility of performance management is high as opposed to where it is low:

- Employee engagement is 14% higher.
- Workforce performance is 24% higher.
- The proportion of employees reporting that performance management is fair and accurate is 50% higher.
- The proportion of high performers in the workforce is 7% higher.

More recently, [research by McKinsey](#) shows that resilient organisations not only survive but thrive during times of uncertainty. It becomes more essential that goals and metrics are clearly connected and yet are capable of flexing as the business needs.

Continuous Performance Management practices are now more commonplace. Managers and team members have more frequent, conversational-style, check-ins to discuss objective setting, progress and goal achievement. Goal setting is now more agile and aligned to broader organisational goals and feedback is requested and received from other team members more readily.

¹ KINLEY, N. (2016) The end of performance management: sorting the facts from the hype. Strategic HR Review. Vol 15, No 2. pp90–94



This change has come about because:

- Employees want more regular feedback – and they want [both the negative and the positive feedback](#).
- Employees and organisations expect continuous learning.
- Organisations want more data to inform talent decisions.
- Goals change as strategies change which means greater flexibility and agility is needed in goal setting.
- Employees want to see how they contribute to the team and the organisation.
- Employees want greater clarity in how performance is measured.
- There needs to be closer alignment of individual goals and business goals.

HR, L&D, line managers and employees have all needed to rethink how best to have these check-in conversations. However, while the increase in more regular conversation and communication between managers is taking place right now, we also need to contend with the recent shift in location of work and growth in home-based or remote working. This shift has implications for leadership, collaboration and productivity. When employees and managers could catch-up in the office or snatch a conversation, now calls need to be planned and performance conversations scheduled. And it doesn't look as though a wholesale return to the office will happen anytime soon. [Over 40% report](#) that over three quarters of their workforce are now working continuously from home, and 21% say that all of their workforce is now working from home. This 'remoteness' may add a new challenge to performance review – and underscores the need for reliable and robust performance practices.

A Good Practice Guide

Achieving 'good practice' is the aim of us all when looking at how best to develop and embed a continuous performance management approach. Too often though we do not have the knowledge to know what works or what doesn't.

The Police Talent® User Group worked collaboratively to develop *The Good Practice Guide to Implementing PDR within Police Forces*. The Guide on which this Guide is based, emphasises the essentials of engagement and involvement and how implementation and roll-out does not stop once the review process is launched.

We made a clear decision not to present this as a 'Best Practice' guide as the term itself suggests a single approach to adopt. Instead, we see this as an evolving set of principles which will be refined, adapted and amended as working practices develop and review situations change. This Guide brings together the practical learnings from real projects and shares the actions and tips that have helped organisations to:

- Engage right across the organisation as a new performance process was defined and designed.
- Gain buy-in from those at every level and in every function.
- Define what was needed and expected from a performance process.
- Choose the best software provider – or developer – for the organisation.
- Tailor and customise the experience for the individual to demonstrate relevance.
- Increase individual ownership of goal setting and achievement.
- Launch, roll-out and bed down the new process, new software and new approach to review.
- Upskill their managers to be coaches of performance.

We believe that the growth in continuous performance management will continue and the key to its success will be to engage and embed this within our working practices.

Should you have any comment or addition to make, please get in touch. To learn more about how we work with organisations, please visit our website.

A Framework for Engaging Performance Review

When faced with tips, tools and learnings generated from experience of implementing and embedding successful performance review processes, there is a danger that any guide simply becomes a checklist of 'things to do' and 'things not to do'.

Rarely is such an approach beneficial without it being anchored in a framework.

For this reason, we have brought together the learnings from our clients into a graphical framework.

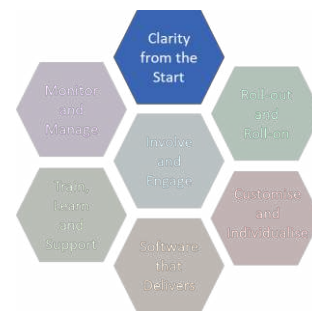
At the core of the model is the central belief that to 'involve and engage' drives the other essential factors.

Without involving and engaging the workforce, it will be difficult to embed a performance review process which is perceived as respected, valuable and a fundamental component of talent management within the organisation.



Clarity from the Start

Before embarking on a review of the current performance management process – and the changes that need to be made – it is important to be clear on why the review process is important, its value to the organisation and each individual and the resources you have available to action the project.



Recognise that this is not an HR-only project

For perhaps too long, HR, talent, L&D and OD leaders have taken on the sole responsibility for the performance review process. As a result, it has sometimes been side-lined or viewed as merely an HR admin task. We know that this is not the case. The management and achievement of goals and performance is the responsibility of all and, while senior leaders are the key owners and drivers, each individual has their role to play.

Extending the design and deployment programme beyond the walls of HR requires shifts in behaviour and the focus of HR. In essence, it becomes part of any cultural shift across the organisation. Today – and perhaps in the very near future – HR may be concerned with the ‘return’ or ‘completion’ rates of performance reviews. Going forward, HR will need to change its responsibilities from monitoring completion to:

- Ensuring the alignment of objectives.
- Responding to real-time Training Needs Analysis feedback.
- Supporting managers with team performance and engagement issues.
- Providing real-time information to the leadership team around objective achievement, L&D focus, competence gaps and high performers.

It means that HR leaders will be required to step up and go beyond what may be the comfort zone of the performance calendar. They will need to look not at compliance rates, but at the impact that performance conversations are having on achieving the organisation’s goals and the development and promotion of the behaviours needed of its people.

From a practical perspective, IT teams must be involved. They are an important element of the overall success of any IT-enabled performance review project. Have them on side, and the implementation will be far smoother than if they are kept at arm’s length and their input not sought. But engagement with departments beyond HR and IT are also crucial to the success of PDR.

“In our experience, the IT department is an essential enabler to the success of continuous performance management.”

Ian Lee-Emery, Founder, Head Light

Be clear on the reasons – and the message

There needs to be a clear articulation of the drivers behind the rethink or redesign of the current performance review process.

These may include any of the following: a desire to link development more closely with performance; a way to communicate the core objectives of the job role; a shared insight concerning the goals of future roles; a need to report on performance management results; a demonstration of commitment to professional review and the benefits behind ‘reflective practices’; and a reliable source of ‘numbers’.

Once the rationale for updating the review process has been agreed, this must form a core of messaging across the organisation.

Show the link between Performance Review and the Business Plan

Organisations and job roles are changing. As new business strategies are defined, and new ways of working are put in place, the way in which we engage with individuals and teams needs to change. Places of work may have altered and business plans adapted. Clarity in communication is important, as is the demonstration of the link between individual contributions and goals of the organisation.

For some organisations this change in business may be the catalyst to rethinking and redesigning the performance review process to ensure focused alignment with the new plan. This link needs to be the common thread connecting the initial 'explain and buy-in' conversations to company-wide communications.

“All objectives set across the business are aligned to our business strategy. It gives our people a very clear line of sight of their contribution to reaching our goals.”

Allison Miller, HR Manager, The Muñoz Group in the UK

Set out how Performance Review will be used

The value of performance management is not in the compliance with the process – the form-filling, tick-box exercise to simply deliver statistics – but in its application to improve performance, goal achievement and align behaviours across the organisation. To gain everyone's engagement with the process, and for them to view it as a core element to their role, we need to be clear as to how the information can and will be used. Legal frameworks such as GDPR also play a role here, as does the cultural shift towards greater transparency.

Encourage managers and their direct reports to set and review objectives linked directly to their roles. Show the connection with development plans to demonstrate what needs to be learned or practiced in order to achieve their goals. Be clear on how the performance review process informs promotion and selection. Make conversations about performance and goal progress part of everyday working life – and not only at key times of the year.

Allocate resources

A change programme requires resourcing – time, people, budget and a redesign of a performance review process is no different. Dedicated time and people resource are fundamental – both within the core team and those brought into the programme for ideas, opinions and reviews as the project continues.

Think about secondment to the team; a redesign of a performance review process often happens alongside the 'day job' and so resources get stretched. We have seen successful secondments to the performance review team with previous project and programme management experience, or who can coordinate the inputs and opinions of different parties as the project develops. We have also seen that organisations recognise the essential ongoing need for proper resourcing of an embedded performance review process that a new and permanent role was created. This is a testament to the importance that such organisations place on continuous performance management.

Reach out to and learn from the wider network

The membership of talent leader networks plays an important role in helping to gain clarity on what you want to achieve. Share experiences and learn from others. There is always something that can be performance review workshop or webinar or a conversation with other organisations also looking at performance review.

Resources



[Getting performance appraisal right](#)



[Three questions to ask of yourself if you are thinking about Continuous Performance Management](#)

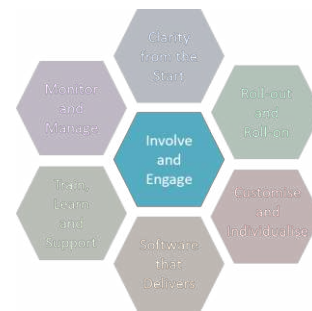


[What is Continuous Performance Management?](#)

Involve and Engage

Arguably, involvement and engagement are at the core of the entire performance review process – from the initial review, design and specification right through to the take-up, advocacy and completion.

Without this component of the framework, there will be no sustainable performance review. Involvement is fundamental and buy-in is important. However, it is engagement that will make the greatest difference to the value of performance management.



Obtain and encourage overt senior stakeholder support

The most successful change programmes have not just tacit support from the leadership team but also demonstrable and vocal backing. Lay the foundations early in the project.

Identify those you need to involve and engage with. This may be those who, by the nature of position or role, are important to have on board or they may be influencers across the organisation, outspoken about performance appraisals, or those who possess the energy and drive to see that performance review processes are improved. Invite into the 'fold' the 'vocal dissenters' – the likely critics or potential saboteurs. Make sure that senior stakeholders are involved, consulted, invested and on board at an early stage. This can be a sensible plan as, without their support, the project can be held back. Build into your plan regular updates and communication with these people. Know that continued communication and involvement are essential to the programme.

Meet your stakeholders where they are

Invest in meeting with senior leaders and sharing your vision of performance review. Get in front of them (virtually if needed) and accept you will be repeating and reinforcing your message many times. Use meetings to explain the project and what you want to achieve, how this will impact the organisation and the expected timeline. Tailor the conversation to resonate with your audience and share the vision of the future. Make your messaging simple and use slogans if they work for your audience.

Listen to what is said about performance appraisals and the process – their history and future. Absorb comments and feedback. If there has been a chequered history of appraisals, there may be cynicism and indifference to current plans. Meet those willing to share their thoughts where and when it best suits them.

“Those clients that invest in meeting with stakeholders at every level within the organisation, get greater input to the design and ultimately stronger buy-in.

It means that diverse perspectives input into the design specification, and, when people get to see their ideas included and configured into the software, they know they have been listened to and their ideas have been considered and used. Essentially, they get engagement right from the get-go.”

Debbie Hance, Head of Business Psychology, Head Light



Build a cross-functional working group

Central to the ‘involve and engage’ fundamental is the bringing of people together across disciplines and departments.

In our experience, bringing people together like this shares perspectives, challenges and resolutions and also acts as a vessel to gather feedback from those with a view on how the new continuous performance management and review process should be implemented.

It also ensures a wider reach beyond the HR, L&D or talent team, and helps with the buy-in and engagement during the design, pilot, roll-out and continued use stages. After all, involvement in the working group will have shaped the outcome, by providing the opportunity to share ideas and concerns.

Recognise the role of strong messaging and communications – but access the power of advocates and informal networks

Where possible, bring a communications professional into the working group. They can help shape the message, ensure the regularity of activity and focus on the positive.

While formal communications are essential and add a rhythm and structure to the programme, it is the informal networking that often encourages greater buy-in and strengthens engagement.

Make sure to use informal networks and social media help spread the word about any new performance review system – and can generate interest which would be difficult to obtain in other ways. In any project, advocates play an important role. These are the people who are well connected and feel comfortable sharing their views. Encourage their engagement with the programme and also their broadcasts to their own networks.

One of the most influential moments of the newly-designed professional development and review process at one Head Light client was the recording and sharing of a personal, unpolished and ‘as-it-is’ video of an officer finding his way around the new software. The audio shared his experiences as he started to explore it and the video was probably more effective than the professionally-produced, carefully-scripted videos we usually strive for!

Think how you can reach these people and actively encourage them to create home-made, credible, and authentic ways to share their view of the review process.

Get the IT team onboard

In many organisations IT has a very broad role to play – from developing in-house tools, supporting the selection of vendors and providing governance and assurance that data is held and processed correctly. Selecting and working with SaaS (Software As A Service) vendors (such as Head Light) can often be a new experience.

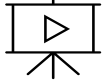
Having recognised controls in place such as ISO 27001 makes life a lot easier for internal IT teams as it provides visibility of operating processes and levels of external audit that IT just needs to check rather than execute themselves.

With performance management systems, often data sharing from HRIS or a Single Sign On platform is an important requirement. Get IT involved very early in the process, as part of the pre-selection of a vendor and have them part of the screening process from Day One. The project team will need IT driving forward certain technical areas and experience suggests they work best when they are an active, early stakeholder.

Resources



[How to transition to Continuous Performance Management](#)



[What are the conversations playing in people's heads regarding performance reviews?](#)

Software that Delivers

Software is the backbone to every performance review process. It is an enabler to the success of the overall project.

Get it right, and users will feel motivated to participate in the processes regularly. But get it wrong, and it becomes an excuse not to engage with the process at all.

End-user expectations of how software looks and navigates have been set very high by the ubiquity of 'apps' on smartphones. Fall short and you might hear the word 'clunky'. That is an 'extinction event' for enterprise systems such as performance review.



Buy-in or develop in-house?

There is a decision that needs to be made early in the project: develop a bespoke software system internally or look outside at the HR tech suppliers in the market.

Either way, you will need to gain access to the your system early on in order to help explain and demonstrate your vision with stakeholders and take them through the screens and process of goal setting, review and progress achievement. Developing easy to use, mobile-responsive and secure software is a highly specialist task. It requires an extensive and experienced multi-disciplinary team, clear definitions of outcomes and a good working knowledge of how to develop systems that rely on constructs such as organisational hierarchies.

Here are some questions to ask of yourself and your organisation:

- Do you want your performance review system to stand alone from the other HR systems so that it follows its own stream of development as needed?
- What in-house resources are available to support configuration – and the inevitable tweaks to the system that will be needed once the system is being used in earnest?
- Where does the performance management system with other developments within your organisation?
- Are you able to provide the IT team with a clear specification of what is needed to be built, including screen mock-ups that are attractive, work on any screen shape and size and are easy to follow?
- How important is it that you can access the learnings and experience of the software by other users?

"In our experience, when time is short, resources are limited, there is a strong business need to get up and running as smoothly as possible, it is easier – and quicker - to configure a system that has already been shown to be successful and is being used elsewhere.

Sometimes, in-house teams can underestimate what it takes to design each and every screen, the workflow and process, so that their IT development team can build a system from scratch."

Ian Lee-Emery, Founder, Head Light

When buying in, use the G-Cloud Framework

The G-Cloud framework allows public sector organisations to find, compare and buy cloud-based services more easily without having to go through a full and complex tendering process. It's a simple six step process that's free and then public sector organisations can buy trusted cloud-based solutions more efficiently. The contract has already been pre-negotiated with all the clauses that you and your Legal and Procurement teams would expect.



Head Light has been included for many years on the G-Cloud framework, successfully reapplying for each of the framework updates. This, together with being an ISO 27001 security accredited vendor, means that organisations can be reassured that their data will be kept safe and secure.

Design the specification of the process

Build the specification of what is needed based on the comments and feedback from stakeholder interviews and the vision of the future. Talk to other organisations regarding what they do, what they could not do without, and what they would change in their process if they had the opportunity.

Whether developing the software in-house or configuring an external system, talk through the detail of what is needed.

Develop and play in a sandpit site

Design and build the system that you think you want. Configure the screens as you want them, and then simply play. Do not do this in the site you intend to make live but do it in a ringfenced sandpit site. This ensures that, regardless of the data that you may import, add, delete or enter, there will be no impact on the real data of the live site. Try out different scenarios and use this version with any trial or pilot group of people you are working with.

Pilot the system with invested groups

Piloting the system is an essential component of the project – and not one to be skipped. It not only gives you access to those who have not been as close to the project (and therefore is a good check on the intuitiveness of the system) but also helps build another pool of people to share their experiences across the organisation.

One Head Light customer chose to pilot its Talent Performance system with the IT department and other parts of the organisation.

“Piloting the system is a great way to test it how it works and to seal engagement with the final version that will be eventually be deployed across the organisation.”

Anna Nightingale, Head of Training and Support, Head Light

Access your network to understand the pitfalls

Attend external performance review workshops and webinars, and talk to those in other organisations about what they are doing, the challenges they are facing, what might lie ahead for our project and how best to mitigate any issues.

Take up references from suppliers if you are looking outside the organisation. Involve the working group when viewing the options with their specific focus in mind.

Know what you need

Before getting blinded by the options, be clear what the organisation needs.

Keep it simple and straightforward. Be aware that the system should be capable of expanding and extending as your managers and team members become more confident with the performance review process and want to explore new ways of working with the information.

Some typical requirements include:

- Real-time access – and works effortlessly with those based outside of a main office or location.
- Intuitive and easy to use.



- Capable of managing regular check-ins, feedback, and updates.
- Configuration to meet specific demands of the organisation.
- Inclusion of tailored ratings, language and terminology.
- Capability to hide / reveal functionality for different users.
- A product development programme that allows for future developments ideas to feed into it.
- Technical support when you need it.
- A performance review-relevant look and feel.
- Tailored, automatic reminders and flags.
- A range of talent analytics and reporting functionality.
- The relevant data privacy and security checks in place such as ISO 27001.
- A software partner with a track record and who can become part of your team.

Resources



[Questions to ask your software supplier](#)

Customise and Individualise

Performance management systems in the past have been clunky, off-the-shelf systems which cannot speak the language of organisation and are not capable of adaptation.

'Flexibility', 'agility' and 'forward-looking' are now key terms associated with performance review software.



Design your organisation's system

If developing a system in-house, the language, terminology and what is presented on each screen will need to be mapped out individually.

If choosing to buy-in an external system that can be configured, make sure that the supplier works with you via an onboarding guide. The supplier will have carried out numerous projects and will know what decisions need to be made, in what order and how to get up and running. You will want a trial system to share with the working group and during stakeholder meetings.

Recognise the differences of managing remote workers

The uptick in home-based or remote workers brings its own set of challenges to those engaging in performance review. Relook at the words and language used within the system to build inclusivity and avoid alienating those now in geographically dispersed teams or with managers no longer based in the same location.

Personalise the system for distinct segments of your employees

You may also want to customise and individualise the system, based on the person being reviewed and their role. Think about how marketing departments segment their target audience, adapting the messaging, language, and media used to best meet the needs and concerns of their target customer.

Choose the words used on screen, the titles of tabs, the words on the action buttons, the notification emails and any performance rating scales used.

Set the bar high with individual objective setting

Ensure the system enables individual objectives to be set and agreed with the line manager. Define the minimum number of objectives – and any core characteristics. For example, perhaps each person needs to have an objective aligned directly with an element of the organisation's business plan, or linked to the corporate values, or tied to a team goal. Start out with a mandatory objective type and develop this further.

Another key to effective performance review is the ownership of objectives and how to achieve these. Embed this messaging in your comms around the system and in the training you offer.

Resources



[How to capture feedback in continuous performance management](#)



[Talent Consumerisation and performance management](#)



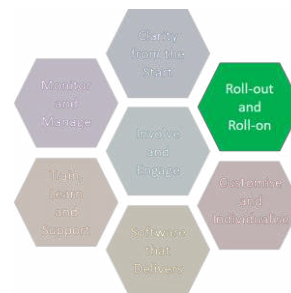
[Improving talent management by learning from marketing](#)



Roll-out and Roll-on

Planning the launch and roll-out of a PDR process requires personalisation and an investment of time and resources.

Once launched, PDR needs to be nurtured and developed, encouraging people to engage with the process and support it when needed.



Think creatively about the roll-out – and plan

Gather what is needed to support those across the organisation as you roll-out your update performance review process. Consider each department and role. What would best help these individuals to understand their next steps?

Include various elements in the roll-out plan: social media; central intranet webpage; internal announcements; video clips; updating policies, messaging from the senior management team...

Tailor the plan for different employee groups. Reach out to them at a time and place that best suits them. Take time to show and explain – highlighting the input of previous feedback and the working group's thoughts.

The result to aim for is one of delight that the system looks easy to use, has learned from the shortfalls of previous performance systems and that feedback has been acted upon.

Showing that input and ideas from the focus group and other user representatives can be very powerful. Again, consider how you can mention your advocates and their contribution – everyone likes a brief mention occasionally and you may find that people 'warm' to the inclusive ethos of the project.

Plan how you will engage with those working remotely.

Enable people to grow with the system

Launching the new performance review system is the start of a new way of working. As individuals begin to feel comfortable with the software and the process, they may ask for access to additional functionality which you can switch on as your system allows or have these already available for them to move onto.

“Employees have enjoyed working with the system and they like to explore the functionality and, most of all, to manage the system themselves, dipping in as they want to.

We also decided that we wanted to compliment the system with a better 360 tool than we had and chose to build in Head Light's Talent 360. It means that the competencies that ask people to align themselves against are now featured within the performance system and they're able to evidence themselves against these.

Allison Miller, HR Manager, The Muñoz Group in the UK

Resources

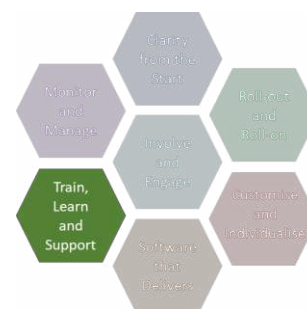
See the appendices for examples of launch materials



Train, Learn and Support

With the new performance review system in place, how you choose to train and support your people will impact their engagement with the entire process.

Think too of the additional skills development that may be needed alongside systems learning.



Challenge the user guide approach

Consider the support and user guides you may wish to offer – and now move on from this.

Long gone are the days of lengthy and in-depth user guides which rarely got read but did serve as a barrier to adoption. Nowadays, user guides are short, to the point and aim to act as a start point only. Think 'Quick Start' Guides which are videos, or make use of any internal software features that provide this kind of immediate user engagement.

Challenge yourself throughout the project to look at how you need to explain or communicate any changes to the process. If you think a user guide section is needed, rethink the on-screen instructions or what you are asking people to do.

“In our experience, long user guides should not be used and are used only to try to iron out and explain complex processes. Far better to rethink and redesign the employee experience.”

Ian Lee-Emery, Founder, Head Light

Think through the training

Training courses still have value. Consider running courses – whatever form they might take - alongside external trainers which combine the key messaging around how and why the performance review process is important, with a specific look at the system itself.

Supplement training with webinars. Be inventive about how further training is delivered. Record short videos about common practices that take a user through the screens and the actions needed. Rather than think “how do I train a user?”, think “if I am the user, trying to achieve ‘x’, what do I do?”

Decide how best to support remote or home-based workers

Technology enables communication and training and plan how you will upskill those working away from the main office or hub. Performance review ‘at a distance’ requires new skills. Develop and support managers and team members as they learn how to have regular check-ins, progress reviews and request and receive feedback.

Develop a regular cadence to reviews as, when geographically separated, there is less opportunity for an unscheduled ‘water cooler’- type conversation.

For many organisations, it seems the [key challenges around performance management](#) have been how managers provide coaching and feedback to remote workers, their communication with those now working from home and how best to set goals.

Work with managers to upskill them in the behaviours they need – and give them the tools that they require to do this part of their job.

Develop new essential skills

There is a raft of skills that need to be sharpened if performance review is to progress. Having difficult conversations about performance, creating clear expectations and goals, providing feedback, coaching and motivating people – these will all become more important in the workplace of the future.

Enhance managers' skills in fairness

Help managers to make accurate and fair assessments of performance by up-skilling line managers to be more effective assessors. Help them to understand how their decision-making processes can impact on performance assessments. Provide tools and strategies to manage and minimise their personal biases which may impact their assessment of others. Offer workshops and other hands-on learning sessions to educate about unconscious bias which can come into play more so because of the lack of physical proximity or presence with remote workers. Indeed, some albeit limited [research](#) has shown that while the productivity and satisfaction levels of those working from home can increase compared with office-based workers, the promotion rate of employees can fall. Be clear of the impact that visibility may have on succession planning and opportunity giving activities.

Help managers to become coaches

Management skills have extended to now include those of coach – and such skills are pertinent in performance check-in conversations. An effective manager-as-coach will ask questions of their team member rather than provide them with answers. They will support employees and facilitate their development. It takes a shift in behaviour and a [learning of new skills](#) to become 'coach'. They also need to learn how to give difficult feedback and address awkward performance conversations.

Teach people how to set and manage objectives

Good quality objective setting is crucial to the success of performance management. Invest in [teaching managers and team members how to set objectives](#), how to align these to the organisation's goals and how to link these to development plans.

“Goal setting is important for motivation, focus and prioritisation, particularly in complex and ambiguous environments. Setting clear, measurable objectives to help focus behaviours and activity on what really matters, what will make the biggest positive impact on the organisation and the people it serves, and linking these with areas of individual strength and development need, is essential to effective performance management.”

Debbie Hance, Head of Business Psychology, Head Light

Offer different routes of support

Support has come of age and no longer is focused solely on a help desk approach. Tailor your ongoing support offerings to meet users where they will access help. Think intranet, email, short one-issue videos, reminders via intranet, FAQs, a newsletter... Learn what has worked before and tweak the support as you progress.

“We have seen some of the most successful implementations of continuous performance management steer away from lengthy user guides and switch to more snackable content of short video clips and FAQs. A dedicated email inbox means people can reach out when needed but more proactive updates and newsletters help to ensure the messages are kept front of mind and the software kept in use. It means the system and process becomes integrated into their work and the employees engaged with the process.”

Anna Nightingale, Head of Training and Support, Head Light

Resources



[Empowerment and delegation](#)



[Motivation and engagement](#)



[Coaching and goal setting](#)



[Performance conversations](#)



[Cascading objectives](#)



[What does a good objective look like](#)



[How to develop a good objective](#)



[How to check-in](#)



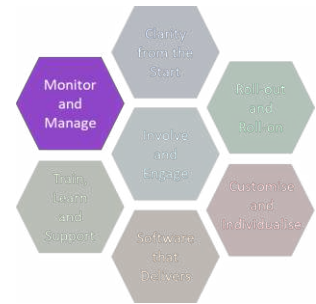
[The biases impacting performance management](#)



Monitor and Manage

The ongoing use of a performance review system needs to extend beyond the straightforward reporting of numbers.

Nurture engagement through ongoing communication and support.



Move to track engagement and not only compliance

The ongoing use of the process and system will reach beyond compliance. Organisations need to look at the quality and engagement of performance conversations.

Focusing on compliance leads to performance management becoming an administrative task for all. Create the desire to have the check-in between the manager and the team member because of the value obtained in doing so. Get engagement right and compliance follows.

“HR has an opportunity to step forward and not be the ‘internal compliance officer’. However, it requires some bravery and conviction that doing the right things will generate the right results. If you can resist getting drawn into discussions about a lack of compliance by ‘outliers’, you can focus on the engagement of and benefits to the majority. Initially you might be a lone voice, but not for long.”

Ian Lee-Emery, Founder, Head Light

Of course, some areas of the organisation will want – and need – to focus on compliance but know that the driver to this is engagement.

Check on the quality and fairness of conversations

Choose a software tool that enables you to access a metric to measure the quality of the performance conversation. Head Light’s CPM Index provides this through an algorithm that can be tweaked by the organisation. It provides an indicator of the quality of the review feedback being given.

One Head Light client, Cleveland Police, has invested in setting up a moderating panel to randomly check on the check-in evidence submitted as part of its process. Panel members each check a number of reviews several times a year looking at fairness in review, quality of evidence provided and frequency of check-ins.

“The first year of implementation was focused on getting people to navigate the system and educate them about how useful PDRs can be, as well as the positive impact they have on promotions and developing themselves on a personal level.

Now we are focused on improving the quality of evidence that is being used and how people can reflect on their PDR to take a developmental step forward.

Our moderating panel looks at PDR not from a compliance perspective, but to ensure a fair and ethical approach to PDRs. This moderating panel is quite unique to us in the Cleveland Force – although others may follow. It shows we are committed to a fair process for all of our workforce.”

Jane Gibson, Organisational Development Co-ordinator, Cleveland Police

Access the analytics – and report in the format as needed

Use the system dashboard and analytics to track the key measures you have defined:

- Performance objectives set.
- Values-based objectives set.
- Frequency of check-ins, including specific types such as 'Well Being' or 'Career Conversation'.
- Hotspots of strong and weak PDR engagement.
- Updates on goals and on-track performance.
- Alignment with business objectives.
- Link with development plans.
- Differences between teams or managers.

Proactively offer support

In areas of the organisation struggling to implement the new performance process, reach out proactively to offer support. You have access to locate the hotspots. Decide to encourage engagement rather than discipline the lack of compliance.

"It seems that, in the past, people were not as disengaged from our performance development review process as we had thought. They just needed a really good system in place – and now they have it."

Caroline Oppido, HR Manager, Northamptonshire Police

Resources



[Video on the Continuous Performance Management \(CPM\) Index](#)



[Is Continuous Performance Management working?](#)



Appendices

Samples of Continuous Performance Management launch materials – and ongoing communication

Remember that a communications plan is essential but often it is the more personal and unplanned communications that have the greatest impact on getting people onboard with a new process. What follows are examples of some of the more formal communications.

Our New Performance System Is Ready!

Our new performance goal setting and review system is now ready for launch and is being made available to a small number of teams this week as part of our final testing, before we go live across the company by the end of the month.

The system we have designed, developed and trialled is user friendly and very easy to navigate. You will see that it's simple to add either a performance or development objective, and both team member and line manager can quickly and easily add comments and record one-to-one meeting conversations (called 'Check-ins), which are immediately viewable by both parties.

Getting started

In the next couple of weeks, we'll share a short video with you to provide a brief introduction to the system, and shorter videos to show you how to get started. We have chosen not to create a lengthy user guide as the system has been shown to be quite intuitive during the pilot stage with teams around the company. There is an FAQ document which can be found on the intranet here and we have some virtual 'drop-in' sessions diarised in which we can show you around the system and answer any initial questions.

When the system is ready for you and your team to get started, you'll be sent an invitation email with a link to the system. Watch out for it!

In the meantime, please start thinking about your objectives for the coming year and your manager will soon start to arrange the 1-to-1s with you. There's plenty of advice and guidance in Performance Management section of the intranet.

Going forward

We know there will be minor tweaks needed or improvements that will make it even more user-friendly, and we'll be encouraging feedback throughout the rollout and going forward – just email us with any comments or suggestions.

We look forward to your feedback and look out for further information soon.



Time to book your 1-to-1 meetings with your manager

Our newly designed performance goal setting and review system is now live – and has been rolled out to all teams and departments across the company.

The vast majority of you will by now have received an email inviting you to log in to the new system.

When you click on the link it will take you straight into your account, where you can start setting your objectives (once agreed with your line manager) and recording 1-to-1 meetings.

If, for any reason, your access link hasn't taken you into the system successfully, please get in touch with the team.



Take A Video Tour Around The New System

If you haven't yet had the opportunity to log in to the new performance software – Talent Performance – then why not take five minutes to watch these two videos?

The first gives an overview of the system from an individual user's perspective. The second demonstrates the additional functionality and tabs that a line manager will use. If you are a line manager, please watch both videos!

We hope you will find the new system straightforward and easy to use and you can find further support videos and FAQs on the intranet.

We welcome your feedback so if you have any comments or suggestions, please email us.

Video 1: A preview of the new system from an individual user's perspective - demonstrating how to set your objectives and record one to one meeting conversations

Video 2: A preview of the new system from a line manager's perspective - demonstrating the additional tabs and functions that a line manager will use



31 August deadline for setting objectives

Have you set your 2020/21 objectives yet?

Everyone should now have access to our new performance goal setting and review system and we're asking everyone to have set their objectives and had an initial 1-to-1 meeting by 31 August.

More than 1,350 people have already logged into their account – and we're hearing that that they're finding it very straightforward to use.

Well done to the x department as more than half of them have already set up their objectives – but a number of other departments are close behind.

If you are one of the teams that has yet to make a start, please make it an action to log in and start the process. If you have any issues or questions about the new system, get in touch with us via email. Anyone who hasn't yet saved any performance objectives will shortly receive an email reminder from us.

How to log in

If you haven't yet logged in, the easiest way to access the system is by clicking on the Talent icon we have designed and included on the Google Chrome homepage as part of the startup. This will take you to the main login page at which you can type in your email address and create a password as a new user. Your new password will then be emailed to you.

It's easy to navigate to the objectives and check-in sections (where a record of your 1-to-1 meetings and conversations is made and stored). Take a look at this short video that shows what to do.

Values and Leadership objectives

Don't forget when setting your performance objectives, they must all link to our business plan and at least one of them must be aligned to our values and behaviours.

Line managers must also have at least one objective that aligns to the Leadership section of the Plan.

Help and support

Useful guidance about objective setting and progress tracking can be found both in the system itself and on the relevant pages of the intranet.

If you would like a bespoke training or familiarisation for your team, please get in touch with us.



Values and leadership objectives now required

You will hopefully have seen the recent news item about the corporate values, reminding us what they are, how they underpin the actions we take, decisions we make and attitudes we display, and how important it is that we all live and work by them to help us do the right thing and deliver the best possible service to our customers and colleagues.

Set a values objective

The performance process can help us focus on these and we now require everyone to have at least one objective that relates to our values. Your performance objectives already align to the business plan and we're now asking that, as a minimum, one of these is linked to the values and behaviours section of the plan.

Include a leadership objective for managers

If you are a line manager, we also want you to save at least one objective that aligns to the Leadership section of the business plan.

If you have already set your objectives, please take the opportunity to go back and review them – you may find one of your existing objectives already reflects the Values or Leadership elements of the plan or can be adapted slightly, or you may need to add another one.

And don't forget, everyone is required to have set objectives and had an initial 1-to-1 meeting **by the end of August**.

Further guidance to help you navigate the new system or for general advice about the PDR process, setting objectives and effective Check-in meetings, can be found on the intranet.

If you would like a bespoke training or familiarisation for your team, please get in touch with us.



PDR Objectives – recording your progress

Thanks to everyone who has set up their goals and objectives for 2020/21.

On average, nearly 80 per cent of teams have uploaded at least one performance objective. No-one is quite at 100 per cent but some are very close – however, that does mean there are a few to catch up!

We also asked you to set at least one objective that aligned to the values of the organisation as detailed in the business plan and already more than half of you have done this. Thank you.

You may have set your objectives before we specified this – if so, please now revisit your performance objectives to ensure you have written one that meets this requirement. Think about how it is relevant to your work and you as a person, as this will need to be updated and progress rated in the same way as the other objectives.

Adding updates

So now you've set your objectives, the next step is to add updates to show the progress you are making.

To do this:

- Log in
- Click on each objective
- Add an update in the 'add your objective updates here' box
- Under the 'Progress' title, you can choose from three options: No longer valid/ not achieved; In progress; Completed

Once you've started any work related to your objective and have provided a brief update as to what you've achieved so far, you can record it as being in progress. Then at your 1-to-1 meeting in which you discuss progress with your line manager and agreed that the objective has been completed or otherwise, you can then select the relevant rating accordingly.

Line Managers please note – you will need to select a progress rating for each team member on each objective. Please also remember to complete a 'Check-in' following each 1-to-1 meeting – less than half are showing a check-in so please do set aside time to do this.

Everyone can add a 1-to-1 in 'Check-Ins' but we do encourage managers to do this on a regular basis.

Help and advice

Useful guidance about objective setting and progress tracking can be found both in the system itself and on the relevant pages of the intranet.

If you would like a bespoke training or familiarisation for your team, please get in touch with us.



Next steps

If you would like to know more about how to introduce and embed continuous performance management across your organisation, please get in touch.

About Head Light

Head Light is an award-winning talent management software and consulting firm that works with clients to define and implement impactful talent management strategies.

Talent Cloud® is our cloud-based portfolio of integrated talent management software tools designed for those who expect the maximum return from talent management processes. Our training and consulting services uniquely complement our breakthrough software that engages employees, managers and senior leaders in the selection, development and progression of people in their businesses.

Companies in the FTSE 350, public sector, large and small, from retailers to high tech innovators have all benefitted from our tools, techniques and expertise. Founded in 2004, we are headquartered in the UK.

Head Light has attained the ISO 27001 standard for Information Security. Certificate No 217613.





How do I...

transition to Continuous Performance Management

How do I...

introduce robust Succession Planning

How do I...

spot High Potentials and Future Leaders

How do I...

boost Recognition

How do I...

drive Engagement through Career Conversations and Development

How do I...

embed new values and improve culture

How do I...

develop Skills of the Future

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