

# Making Performance the Conversation at Newcastle Building Society

*Newcastle Building Society's performance review had been typical of many a large organisation: a paper-based, once-a-year, process-driven, backward-focused activity. The result was a single, cumbersome, manager-led performance review meeting that generated a single performance rating validated through manager feedback.*

*Unsurprisingly, feedback on the process from managers and team members was not positive. It was perceived as an administrative burden and entirely disconnected with improving engagement with, and achievement of, goals. This needed to change.*

Cheryl Heslewood, Strategic People Partner at Newcastle Building Society comments: "As a business, we are focused on driving growth. Each colleague has a role to play and a contribution to make. We want them to take ownership of and steer their own performance and determine the impact they are making on the business. We know that the check-ins and conversations between a manager and a team member are crucial to progress, and it was time to rethink how these could be best facilitated."

## **Translating best practice into tangible action**

The starting point was to understand current best practice with regard to performance conversations and the team at Newcastle Building Society invited an external consultant to help shape a new coaching-based approach.

Cheryl explains: "We combined the external support with our own feedback from our consultation across the business. We knew performance management had moved on and wanted to ensure that any new process was exactly as the managers and colleagues wanted while still embracing what we knew as a business we needed. We were clear that we wanted to build a conversation-rich framework with regular, high-quality conversations between a manager and a colleague at its core – and the focus is making sure these conversations take place, are future and action focused, and centre on how the individual can make their own contribution."

## **Collecting feedback and getting buy-in**

To shape the new process, the talent team at Newcastle Building Society hosted and facilitated focus groups, carried out individual interviews, gained feedback and tested ideas. The team knew that to maximise the value of each conversation going forward, each of the 1,300 colleagues would need a readily accessible online tool that could capture and record actions, decisions, and progress. No off-the-shelf tool – or even one marketed as customisable – would deliver what Newcastle Building Society needed. The performance tool they would choose needed to have the capability of configuration to the very specific process needs of the team. Talent Performance was selected.



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*Cheryl Heslewood,  
Newcastle Building  
Society*



*"We challenged Head Light to deliver our vision. They delivered what we needed – and it works."*

"Talent Performance is helping our people to focus on their performance conversations, empower them to take action and understand how their contribution is changing our business."

### **Configuring the system for the firm**

Talent Performance is one of the most configurable talent systems on the market and Head Light built on already-established core functionality and extended and configured this to deliver precisely the portal that Newcastle Building Society required as well as seamlessly integrating it with the incumbent HRIS. Cheryl comments: *"There were challenges – but Head Light embraced these and worked through each, finding a way forward for us."*

### **Meeting the needs of all colleagues – regardless of how and where they work**

It was crucial for the success of the new approach to performance conversations that the system could support office-based colleagues and those based across the branch network. When the global COVID-19 pandemic forced some colleagues to work remotely, Talent Performance ensured that performance conversations could continue. Cheryl adds: *"The capabilities of our online performance portal came into their own. Team leaders were still able to drop into the system and record progress against objectives, using the system to support performance conversations. They had the tool to do this – and to maintain connection."*

### **Making conversations strategic and aligned with the business**

The updated performance cycle includes a minimum of a once-a-month conversation between manager and colleague: a 'check-in'. It focuses on the here and now for 80% of conversation and adopts a future focus for 20% of the time. This ratio gets switched three times a year when the firm's Big Picture Conversations take place. Eighty percent of a Big Picture Conversation focuses forward with approximately 20% acknowledging and celebrating what has been achieved and delivered. Cheryl explains that these conversations focus less on the immediate actions but take a more strategic view of how the individual can contribute to the organisation's success in each of the seven core business areas defined by the senior leadership team.

### **Success: conversations taking place**

Over one year on from initial implementation and a real shift can be seen. Success for Cheryl is defined by not only are performance conversations taking place but are adopting a whole new lease of life right across the firm. Cheryl expands: *"Conversations are more frequent. There's a strong focus on what action needs to be taken and we have put the ownership of success firmly in the hands of each team member."*

Cheryl concludes: *"Our new approach to on-going performance conversations is working and Talent Performance is the tool that is supporting this. Our people welcome the seemingly simplistic system and its uncomplicated approach. Without it, there would be no easy-to-access record of goals, no place for individuals to update their actions or ask for feedback. Talent Performance is helping our people to focus on their performance conversations, empower them to take action and understand how their contribution is changing our business."*

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