PERFORMANCE & TALENT

Customer Comms Plan Template

Communication templates for guiding organisations at time of implementation

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1. Roll-out templates

1.1. Template 1: Introduction for CEO email/video

We've written some key points you can give to your CEO to include as either part of an introductory email to the system OR for them to use as part of a video script.

What's happening

We're updating our performance management [and employee engagement] system. Our annual appraisal [or other system] is no longer working for us as a business, we know that both managers and employees find the old system time consuming, focused on looking back instead of looking forward and doesn't aid anybody's growth. We want to move to a more continuous performance development approach to support everyone's personal development, switch our focus to looking and planning ahead and celebrating our achievements as a company.

Why we're making the change

- Our old system was focused on looking back over 12 months [or other period] – this process is lengthy and it's difficult for all of us to remember what we've achieved over that period
- We want to focus on making things more human, more focused on coaching and individual development
- We want to move away from focusing on measuring past performance to focusing on helping people to perform to their full potential.

What does the system do and what's the new process?

The system supports our new performance development process: Our old

- We'll be setting quality objectives as a business that are relevant and flexible
- We'll have more regular check-ins that are quick and meaningful
- And we'll be giving real-time feedback given by both managers and colleagues – both positive and constructive

It's targeted performance conversations that count and we want to shift to focusing more on the future – what's going well and what needs improving.

When are we making these changes?

The system will be rolled out by [xxxx] and our colleagues in HR will be rolling out training over the coming weeks/months focused on the most important aspect of these changes – the quality conversations, setting objectives and giving feedback.

1.2. Template 2: What's in it for Managers?

This is a template that you can send out to your managers or use to create a short video to help explain to your managers what's in this for them!

Suggested Subject Line: How is Performance and Talent going to help me manage my team

How Performance and Talent impacts you

We know how busy our managers are – juggling your day to day tasks, your team commitments and project work.

We are implementing Performance and Talent to support you in supporting your people in the most effective way possible. Our approach to performance development means we're taking away the lengthy meetings and ambiguity around how to set objectives and enabling you to more easily celebrate when you see your team are doing well!

What's in it for you (and your team!)

Check-ins – regular check-ins and conversations with your team means more focus on development and no form filling for anyone!

Feedback – people can request and give feedback between colleagues easily and in-the-moment[so you no longer need to be the only source of feedback]

Objectives – you will be able to set more clearly defined objectives so that you can track and monitor in order to support your team with completing their deliverables on time, to collaborate with colleagues to drive joint success

Development – support your team with personal development objectives which will nurture them, improve performance and create a happier team

How we're going to support you

System training – [detail what your system training plan looks like]

Soft skills training – [detail what your soft skills training plan looks like]

2. Launch Templates

2.1. Template 3: Getting Started

We have created a suggested introduction email template below for you to use. This can be sent ahead of launching the Performance and Talent system to employees. employees receiving the automated Performance and Talent 'set password' email or if using Single Sign-on, prior to your launch communications.

Subject line suggestion: We're about to launch Performance and Talent

The time has finally come – we're about to launch Performance and Talent.

As you may have heard already, we have taken the positive decision to change our performance and development process to a continuous, year-round approach, supported by a new, easy-to-use software system called Performance and Talent.

What is Performance and Talent?

Performance and Talent enables you to capture your objectives, give and request feedback as well as schedule and document regular performance conversations between you and your manager. It is cloud based software which means you can access Performance and Talent from a computer, tablet or mobile phone.

Next step

You'll soon receive an email from Performance and Talent inviting you to set a password and login.

Once you're logged in, take a look at the attached PDF which provides some suggested first steps to get you started with Performance and Talent.

NOTE: If using Single Sign-on, you may adapt the 'Next step' section based on how you plan to notify employees via your launch communications:

You'll soon receive an email with instructions on how to access Performance and Talent. Once you're logged in, take a look at the attached PDF which provides some suggested first steps to get you started on the system.

Let's kick things off

We'd like everyone across the business to login and do the following by [XXX]:

- Set-up your first check-in with your line manager
- Give two of your colleague's feedback on a deliverable or project you recently worked together on

[Attach the Performance and Talent 'Getting Started' guide]

3. Objectives Templates

These templates are all specific to the subject of setting objectives.

3.1. Template 4: Objective setting checklist for Managers

This template can be used as part of an email, video script or other form of communication that you can send to managers to explain how to set good quality objectives within Performance and Talent.

Objective setting checklist for your team

We've reached that time where we need to start setting our [quarterly] objectives. We're going to use Performance and Talent to do this. We've compiled this checklist to guide you through the process and help support your team with this.

Aligned - means the objective aligns with, and drives, wider team and organisational goals

Agile - means that the objective is near-term, and it is reviewed at a cadence that keeps it relevant and meaningful

Assessable - means that your objective can be clearly measured so that you'll know when you've achieved it

Accountable - means the objective is within your control, and you are clear where there is shared ownership

Aspirational - means that your objective is stretching, yet achievable, and delivery would drive high performance

3.2. Template 5: Objective setting checklist for Employees

This template can be used as part of an email, video script or other form of communication that you can send to employees to explain how to set good quality objectives within Performance and Talent.

Objective setting checklist for you

We've reached that time where we need to start setting our [quarterly etc] objectives. We're going to use Performance and Talent to do this. We've compiled this checklist for you to guide you through the process to help support you ensure they work for you and also support your teams and the business objectives.

1. **Aligned** - means the objective aligns with, and drives, wider team and organisational goals
2. **Agile** - means that the objective is near-term, and it is reviewed at a cadence that keeps it relevant and meaningful
3. **Assessable** - means that your objective can be clearly measured so that you'll know when you've achieved it
4. **Accountable** - means the objective is within your control, and you are clear where there is shared ownership
5. **Aspirational** - means that your objective is stretching, yet achievable, and delivery would drive high performance

4. Feedback Templates

4.1. Template 6: Feedback Friday - Comms Template for Customers

This is an email template you can use and adapt to encourage your team to block out some time during the week to give each other feedback (doesn't have to be Friday!)

Suggested subject line: *Feedback Friday*

Dear XXXX,

Doesn't it feel great when someone tells you, you've done a great job?

We want to make sure that your hard work is captured in Performance and Talent.

Giving and receiving feedback not only lets you and your colleagues know they've done an excellent job, but is great for personal development. Performance and Talent allows you to give two types of feedback:

- Something someone has done well
- Something someone could improve on

"We haven't got time…"

We hear you - we know how hard you're all working right now! The good news is, feedback doesn't need to be overly time consuming and is so important for all of us to both give and receive, especially at times like these. That said, we want to introduce [or encourage you to take part in] Feedback Friday's - block out 30 minutes out on a Friday afternoon and give a couple of people some feedback each week.

Do it with kindness

Feedback given with kindness is very important, even if you want to offer up something someone could improve on, think about these three things:

1. Kindness - constructive feedback should not be critical, don't focus on the negatives or the past, focus on the future and improvements
2. Practical - make sure you offer practical suggestions around how that piece of work / project could have been improved and why
3. Timing – think about when you are sending this feedback, if it's constructive in particular – remember how you would feel receiving something constructive at the end of the day for example

Feed it forward

Share with us the best piece of feedback you've been given and why - we want to collate your stories to share with everyone on the next Feedback Friday to get everyone in the mood!

Happy feeding-back,

The HR Team

5. Check-in templates

5.1. Template 7: How to have a meaningful coaching conversation

This template can be used as part of an email, short video clip or for any other communication around the subject of how to have a meaningful coaching conversation.

5.1.1. Getting the most out of your check-ins

Tips for having quality coaching conversations:

1. Have regular informal check ins – once a month is recommended
2. Use a coaching approach, maintain a balance between asking questions and giving advice
3. Focus on development rather than tasks and operational delivery needs
4. Allow space for honest discussion about barriers to performance or development
5. Stay curious, listen to each other and avoid assumptions and judgement
6. Focus on looking forward, key learnings / reflections and what needs to happen next
7. Areas for improvement should be discussed early (course correction) – take time to prepare recent examples of where things have been 'off course', the perceived impact of those actions, what 'good looks like' – to give a frame of reference for comparison

Things to remember when giving feedback in the moment:

1. Feedback is more effective in the moment (realtime)
2. Growth mindset: when giving feedback it should be from a position of high expectations i.e. I believe in you and want to help to you achieve this
3. People value receiving feedback on where they are making a difference as well as honest feedback on how they can improve (if given supportively)
4. A strengths-based approach to giving feedback is often most effective:
5. Overplaying a strength could also have a negative impact on someone's effectiveness - if someone is over-using a strength this might be a source of frustration or demotivation
6. Give feedback based on what's gone well, behaviours you appreciate, skills and abilities you value, what the organisation values in them
7. Dial up feedback (you want to see more of it) – "you are good at X and I'd like to see more of X because…" (describe desired state / outcome and value it brings) o Dial down feedback – "you're good at X although it sometimes goes against you / doesn't work for Y reasons. It would be helpful / beneficial if you could (describe desired state / outcome). Discuss ideas for how this can be achieved?
8. Corrective feedback is better received when there is regular positive feedback too
9. Feedback is often given by manager/s but can be given by anyone

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