

PERFORMANCE & TALENT

Talent Snapshot Workflow

Manager and Employee Answering of Talent Snapshot rounds

Abi Cattier

10/04/24



Table of Contents

Disclaimer2

1. Round is Launched3

2. Manager Answering.....4

3. Employee Answering6

Disclaimer

Copyright © OneAdvanced 2025.

This document contains confidential and / or proprietary information. The content must not be disclosed to third parties without the prior written approval of OneAdvanced Group Limited or one of its subsidiaries as appropriate (each referred to as “OneAdvanced”). External recipients may only use the information contained in this document for the purposes of evaluation of the information and entering into discussions with OneAdvanced and for no other purpose.

Whilst OneAdvanced endeavours to ensure that the information in this document is correct and has been prepared in good faith, the information is subject to change and no representation or warranty is given as to the accuracy or completeness of the information. OneAdvanced does not accept any responsibility or liability for errors or omissions or any liability arising out of its use by external recipients or other third parties.

No information set out or referred to in this document shall form the basis of any contract with an external recipient. Any external recipient requiring the provision of software and/or services shall be required to enter into an agreement with OneAdvanced detailing the terms applicable to the supply of such software and/or services and acknowledging that it has not relied on or been induced to enter into such an agreement by any representation or warranty, save as expressly set out in such agreement.

The software (if any) described in this document is supplied under licence and may be used or copied only in accordance with the terms of such a licence. Issue of this document does not entitle an external recipient to access or use the software described or to be granted such a licence.

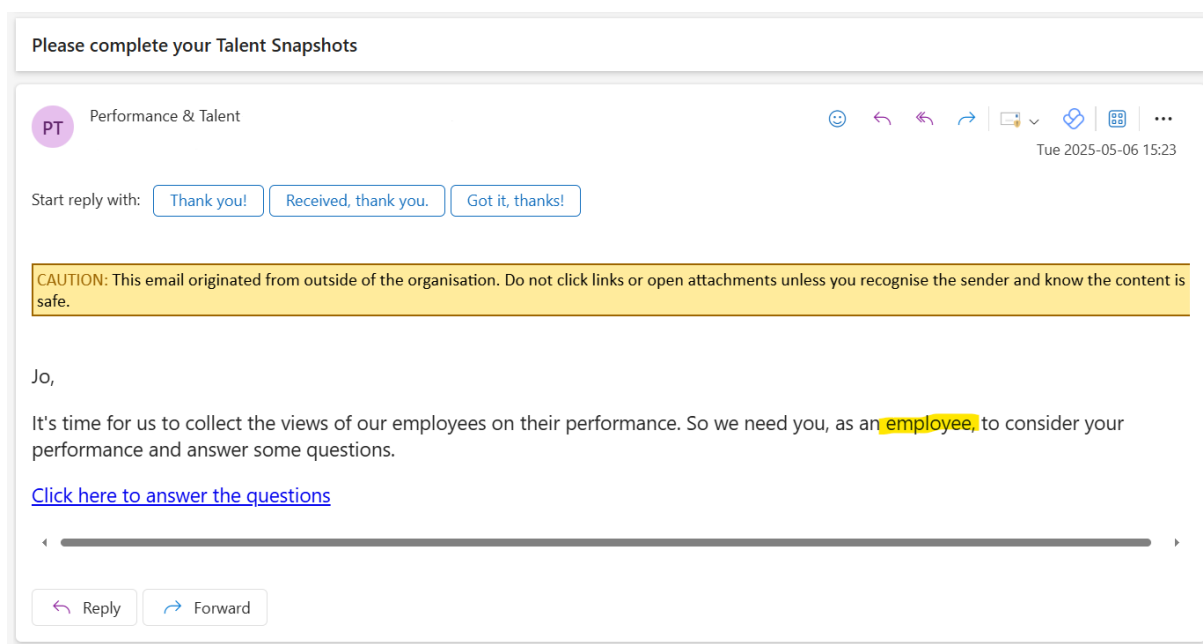
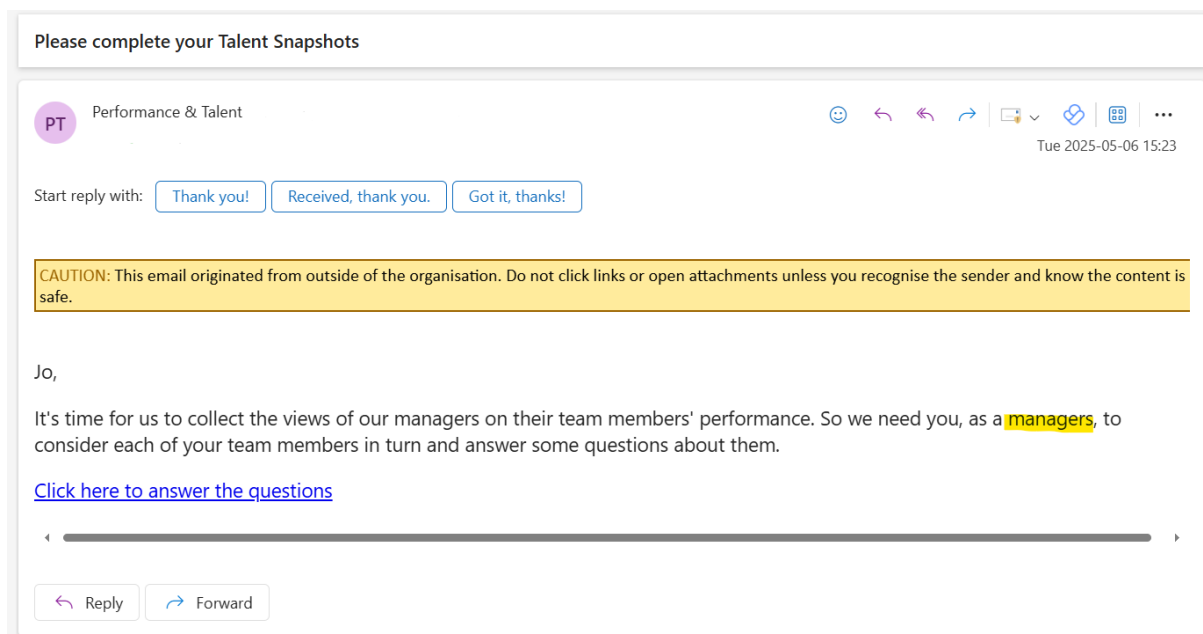
The development of OneAdvanced software is continuous and the published information may not reflect the current status. Any particular release of the software may not contain all of the facilities described in this document and / or may contain facilities not described in this document.

OneAdvanced Group Limited is a company registered in England and Wales with registration number 05965280 whose registered office is at The Mailbox Level 3, 101 Wharfside Street, Birmingham, B1 1RF.

A full list of its trading subsidiaries is available at www.oneadvanced.com/privacy-policy/

1. Round is Launched

Step 1: Administrator launches round; managers and employees receive an email notification alerting them to complete the Talent Snapshot in specified time frame



2. Manager Answering

Step 1: Manager logs on to Your Team > Talent Snapshots area and selects the appropriate round

The screenshot shows the 'Your Team' page with the 'Talent Snapshots' tab selected. The left sidebar contains navigation options: Home, Objectives, Feedback, Feedback Circles, Check Ins, Actions, Surveys, Talent Snapshots, and Your Team (highlighted). The main content area displays a list of Talent Snapshots:

Talent Snapshots	Status	Due Date	Action
Performance Review May 2025	Incomplete	06 May 2025	Answer
Default Template Round 2025 -1	Incomplete	11 Apr 2025	Answer
Default Template Round 2025	Incomplete	10 Apr 2025	Answer
Default Template Round	Incomplete	10 Apr 2025	Answer

Step 2: Manager selects the employee from the list on the right and answers the Talent Snapshot. Employee answers will be visible here when completed.

The screenshot shows the 'Performance Review May 2025' page for employee Abi Jones. The left sidebar is the same as in Step 1. The main content area displays the snapshot questions and a list of employees to answer for.

Questions:

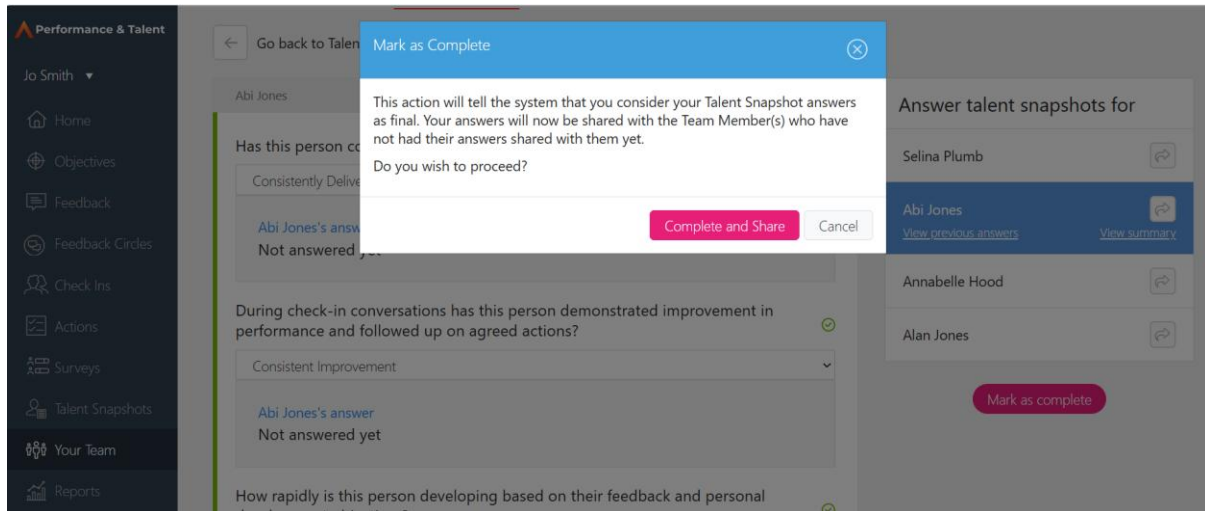
- Has this person consistently delivered their objectives successfully over this period?
Abi Jones's answer: Not answered yet
- During check-in conversations has this person demonstrated improvement in performance and followed up on agreed actions?
Abi Jones's answer: Not answered yet

Answer talent snapshots for:

- Selina Plumb
- Abi Jones** (selected)
- Annabelle Hood
- Alan Jones

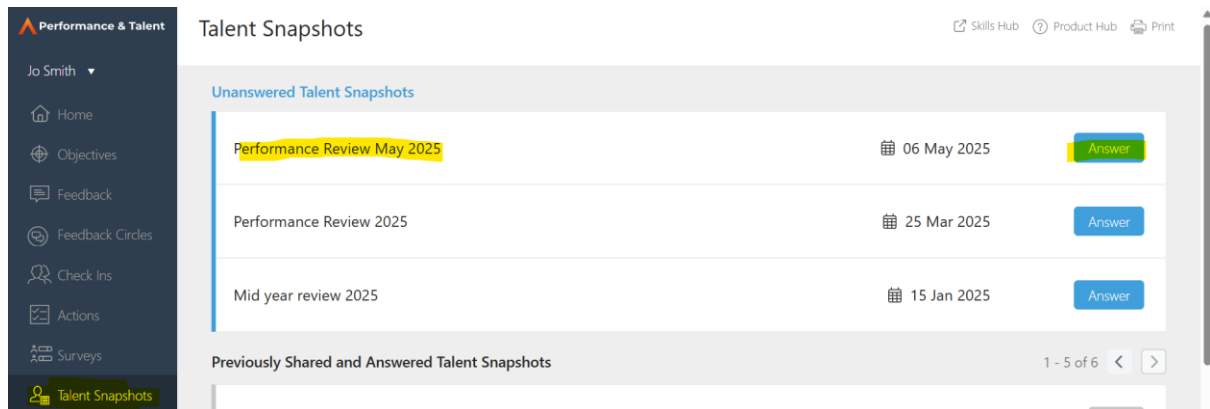
Buttons: Go back to Talent Snapshots, Mark as complete.

Step 3: Once the Manager has answered they must mark the round as complete



3. Employee Answering

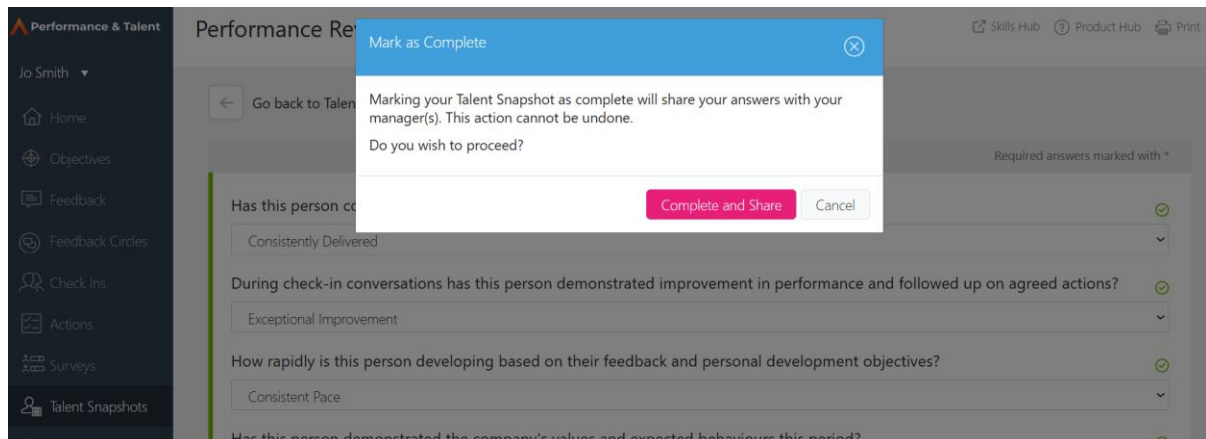
Step 1: Employee also logs on to Talent Snapshots area via left hand menu and answers questions.



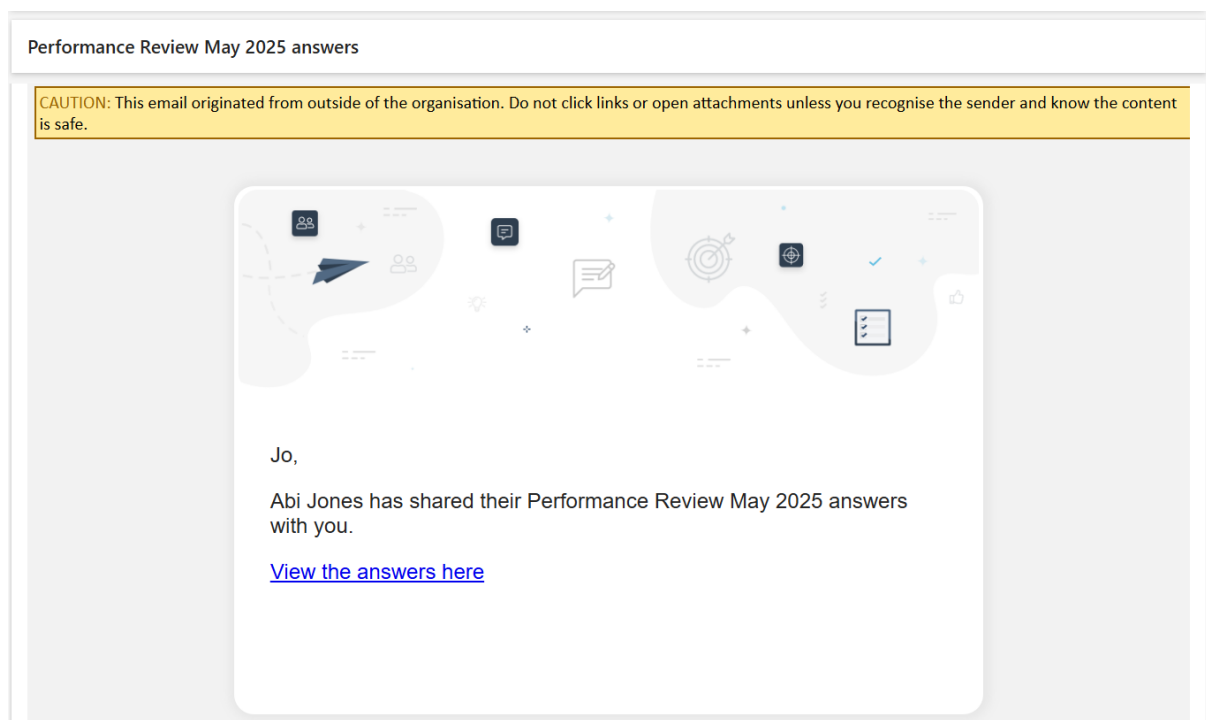
Step 2: Employee answers questions



Step 3: Employee marks as complete



Step 4: Manager is notified that direct report has answered questions (can occur at any point during the round)



Step 5: Manager is now able to view employee's answers

The screenshot displays the 'Performance & Talent' interface. On the left is a dark sidebar with navigation options: Home, Objectives, Feedback, Feedback Circles, Check Ins, Actions, Surveys, Talent Snapshots, Your Team, Reports, and Admin. The main content area shows a 'Go back to Talent Snapshots' button at the top. Below it, the employee 'Abi Jones' is selected, with a note 'Required answers marked with *'. Three questions are listed with their respective answers:

- Question: 'Has this person consistently delivered their objectives successfully over this period?'
Answer: 'Consistently Delivered' (highlighted in blue with a link 'Abi Jones's answer').
- Question: 'During check-in conversations has this person demonstrated improvement in performance and followed up on agreed actions?'
Answer: 'Consistent Improvement' (highlighted in blue with a link 'Abi Jones's answer').
- Question: 'How rapidly is this person developing based on their feedback and personal development objectives?' (no answer shown).

On the right, a panel titled 'Answer talent snapshots for' lists other employees: Selina Plumb, Abi Jones (highlighted in blue with links 'View previous answers' and 'View summary'), Annabelle Hood, and Alan Jones. Each name has a share icon to its right.

Step 6: If the administrator has elected the answers to be shared with employees as well as managers, the employee will now be able to view all responses. If the answers are not to be shared, the employee will continue to only see their answers .



Powering the world of work

Our business software is the trusted choice for critical sectors, including healthcare, legal services, and education. We keep the world of work moving.

Speak to our expert consultants for personalised advice & recommendations, & get support on the products you are interested in.

Contact us

 +44(0) 330 343 4000

 www.oneadvanced.com

 hello@oneadvanced.com

OneAdvanced Group Limited is a company registered in England and Wales under company number 05965280, whose registered office is: The Mailbox, Level 3, 101 Wharfside Street, Birmingham, B1 1RF. A full list of its trading subsidiaries is available at <http://www.oneadvanced.com/legal-privacy>