



Introducing Continuous Performance Management

Template training deck for employees and managers

Agenda

- 01** What is Continuous Performance Management?
- 02** What's in it for me?
- 03** 4 core principles
- 04** 'How to' guides



What is Continuous Performance Management?

An ongoing interaction between an employee and manager, focused on developing the individual to achieve high performance for the benefit of themselves and the organisation

What matters to employees, managers and HR?



Employees wants

to understand how they contribute and can develop

their manager to support their performance and development

their performance and contribution to be judged fairly

Managers wants

a non-bureaucratic, yet structured process and system

to get high performance from a highly engaged team

easy access to training guidance and up to date, meaningful data

HR wants

employees and managers to own the process and system (not them!)

a system that 'just works' – user-friendly, configurable, easy to train

to be able to guide data-led decisions from credible, rich data

Employee Benefits- What's in it for me?



- **Understand your Strengths/Areas for Improvement:** You receive regular feedback to help you understand your strengths and areas for improvement in real-time leading to better performance.
- **You are in control:** You are in control of your own development and can set conversations with your manager at the click of a button.
- **Well-rounded View:** You can request feedback from anybody with the organisation, giving you a well-rounded view on performance
- **Develop your Skills:** Using your feedback, you can address skill gaps promptly enhancing your professional growth and career development
- **Engagement:** Regular feedback and check-ins can boost your engagement and motivation.
- **Clear on Expectations:** With agile goals, you are clear on the expectations of your role and objectives.
- **Raise blockers:** Regular conversations allow you to raise any blockers and understand your performance in real time, not just yearly.
- **Recognition:** You feel motivated as you are recognised for the excellent work you do in real-time





Manager Benefits- What's in it for me?



- **Informed Decisions:** You will have a wealth of data available to you that you can use to make informed decisions around your team
- **Meaningful Conversations:** Discussion prompts and being able to see all feedback received by your team allows you to have meaningful conversations
- **Proactively resolve problems:** By having regular conversations, you can address performance issues promptly
- **Positive working relationship:** Regular check ins promote and open and honest culture leading to a positive working relationship
- **Agile Goal Setting:** It's easy to reflect and align goals to changing business needs, helping you and your team focus on the right priorities.
- **Improve Productivity:** You can uncover blockers within your team to improve employee productivity
- **Talent Development:** You can spot your high potential team members and proactively invest in the development improving employee retention.
- **Monitor Progress:** You can easily view the status of all of your team members goals in one place, easily allowing you to monitor progress or overdue objectives

Organisation Benefits- What's in it for me?



- **Improved employee performance:** Employees can stay focused on their goals and have the feedback and support they need to succeed, leading to significant improvements in employee performance.
- **Increased employee engagement:** Employees feel that the organisation is investing in their success and development. This can lead to increased employee engagement and motivation.
- **Better alignment of individual and organisational goals:** Employees can understand how their work contributes to the overall goals of the organisation. This can help ensure everyone is working towards a common goal.
- **Improved communication and collaboration:** Regular communication and collaboration between managers and employees leads to a more positive and productive work environment
- **Increased agility and adaptability:** Performance issues can be identified quickly and effectively. This can help organisations be more agile and adapt to change.
- **Objective Decision making:** As goals are documented, recency bias is eliminated, enabling leaders and managers to make more objective decisions based on facts.
- **Employee retention:** Employees who feel recognised at work are more likely to be engaged, reducing employee turnover.
- **HR Visibility:** HR have a clear view of all goals aligned to specific organisational objectives. They can also see all conversations so they can ensure they are frequent and meaningful





Explaining Continuous Performance Management

(in a bit more detail)



Annual Appraisals

- 82% of companies report they are not worth the time (Deloitte)
- 95% of managers are not satisfied with them (CEB)
- 75% of employees see them as unfair (Towers Watson)
- 90% of HRDs believe their performance management system does not yield accurate information (Mercer)

After moving to CPM

Organisations:

- **1.4x** more likely to meet financial targets
- **96%** say processes are simpler
- **1.7x** more likely to delight customers
- **90%** increase in employee engagement

Employees achieved:

- **33%** more of their objectives after 12 months

4 core principles



Agile objectives



Real-time feedback



**Meaningful coaching
conversations**



Data driven decisions



Agile objectives

- **Agile & flexible**
- **Near-term**
- **Aligned to organisational goals**
- **Collaborative**
- **Developmental**





Real-time feedback

- **Appreciated**
- **Informal and frequent**
- **Authentic, supportive**
- **Developmental, future-focused**
- **Given in the moment or soon afterwards**



Meaningful coaching conversations

- **Frequent, focused, prompted**
- **Review progress and set future goals**
- **Coaching style, adult : adult**
- **Supportive, developmental**





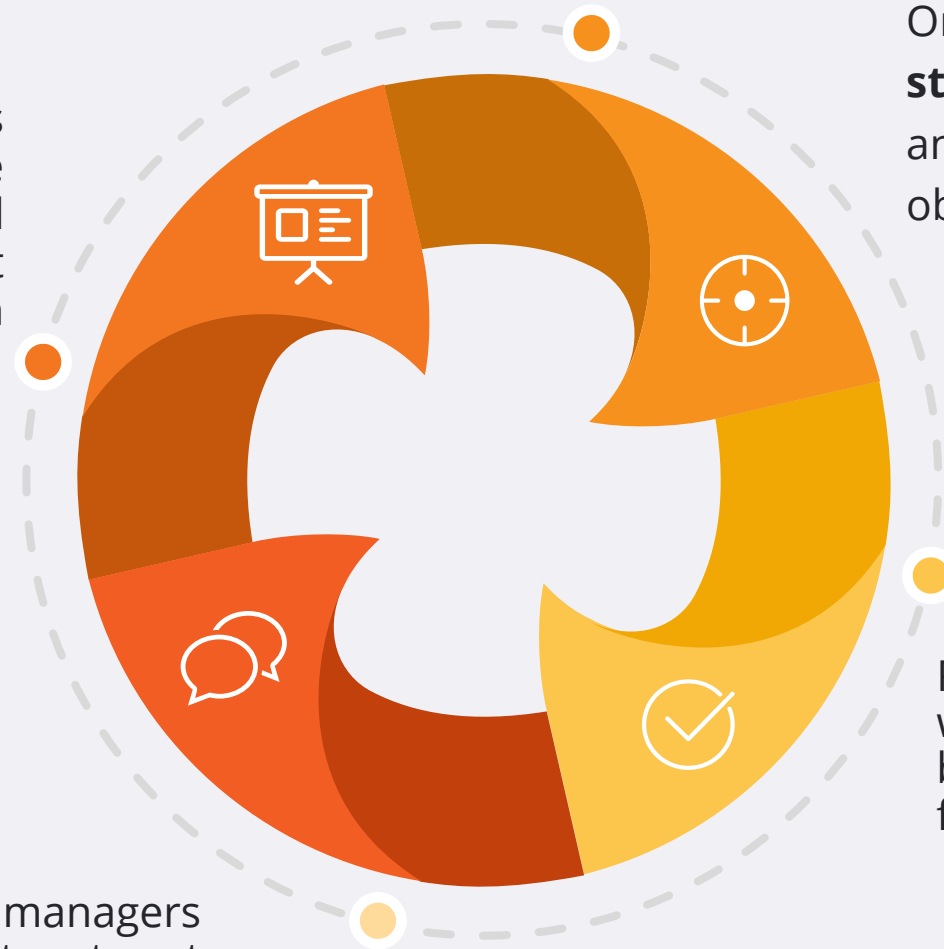
Data driven conversations

- **With a continuous performance management approach, data is captured throughout the year**
- **Enabling important people decisions to be based on empirical evidence, not 'pseudo-science'**
- **Which ensures performance management is valued as a strategic business tool**

Continuous performance management in action



Rich performance data builds up in the system. This can be served up to enable **data-led** decisions based on fact, not opinion



Organisation sets its **key strategic goals**. Employees set and track agile, aligned objectives in the system

Frequent **feedback** is shared with ease in the system, building a developmental feedback culture

Employees and managers use the system to set frequent, meaningful **coaching conversations**



Annual Appraisals

Objectives

- annual, poorly aligned, rating-focused, retrospective

Feedback

- sporadic, outdated, meaningless

Conversations

- 'tick box', admin-heavy, sporadic, contrived

Data

- difficult to gather, incomplete, 'pseudo-scientific'

After moving to CPM

Objectives

- near-term, aligned, agile, collaborative, developmental

Feedback

- in-the-moment, authentic, developmental

Conversations

- frequent, meaningful, coaching style, adult : adult

Data

- rich, meaningful, served up in real-time to enable insight-led decisions

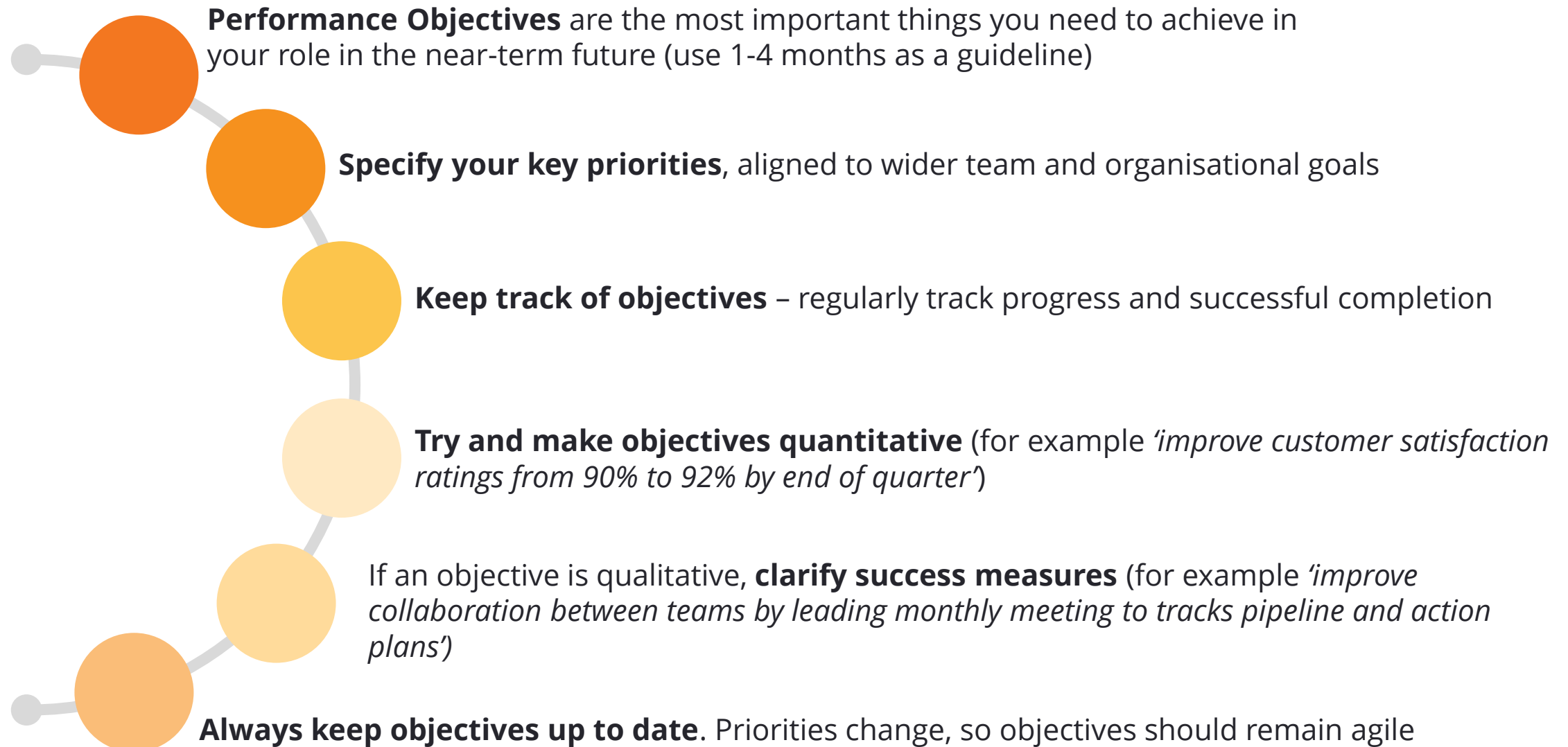


How To Set Objectives





How to set effective Performance Objectives





A good Performance Objective should pass the '5As' test

01

Aligned

The objective should align with, and drive, wider team and organisational goals

02

Agile

The objective should be near-term, and reviewed frequently to keep it relevant and meaningful (use 1-4 months as a guideline)

03

Assessable

The objective should be precise and unambiguous with clear success measures (so that it'll be obvious when it's been achieved)

04

Accountable

You should have direct control over the objective, and you should specify where you share ownership with other collaborators

05

Aspirational

The objective should be stretching yet achievable. Delivery should drive high performance



How to set personal development goals



Personal Development Objectives are specific development areas which will help you achieve your Performance Objectives, career goals or improve an aspect of your performance



A set of Personal Development Objectives is sometimes referred to as a "Personal Development Plan"



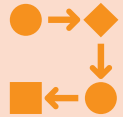
A Personal Development Objective could be to develop a specific skill or behaviour, or to increase your knowledge in a particular area



Or a Personal Development Objective might highlight an existing strength you plan to develop further to benefit you or the wider team. It can be more beneficial (and motivating) to focus on leveraging strengths as well as bridging development gaps



A good quality Performance Development Objective should pass relevant aspects of the '5As' test:



Agile - the objective should be near-term, and reviewed frequently to keep it relevant and meaningful (use 1-4 months as a guideline)



Assessable - the objective should be precise and unambiguous with clear success measures (so that it'll be obvious when it's been achieved)

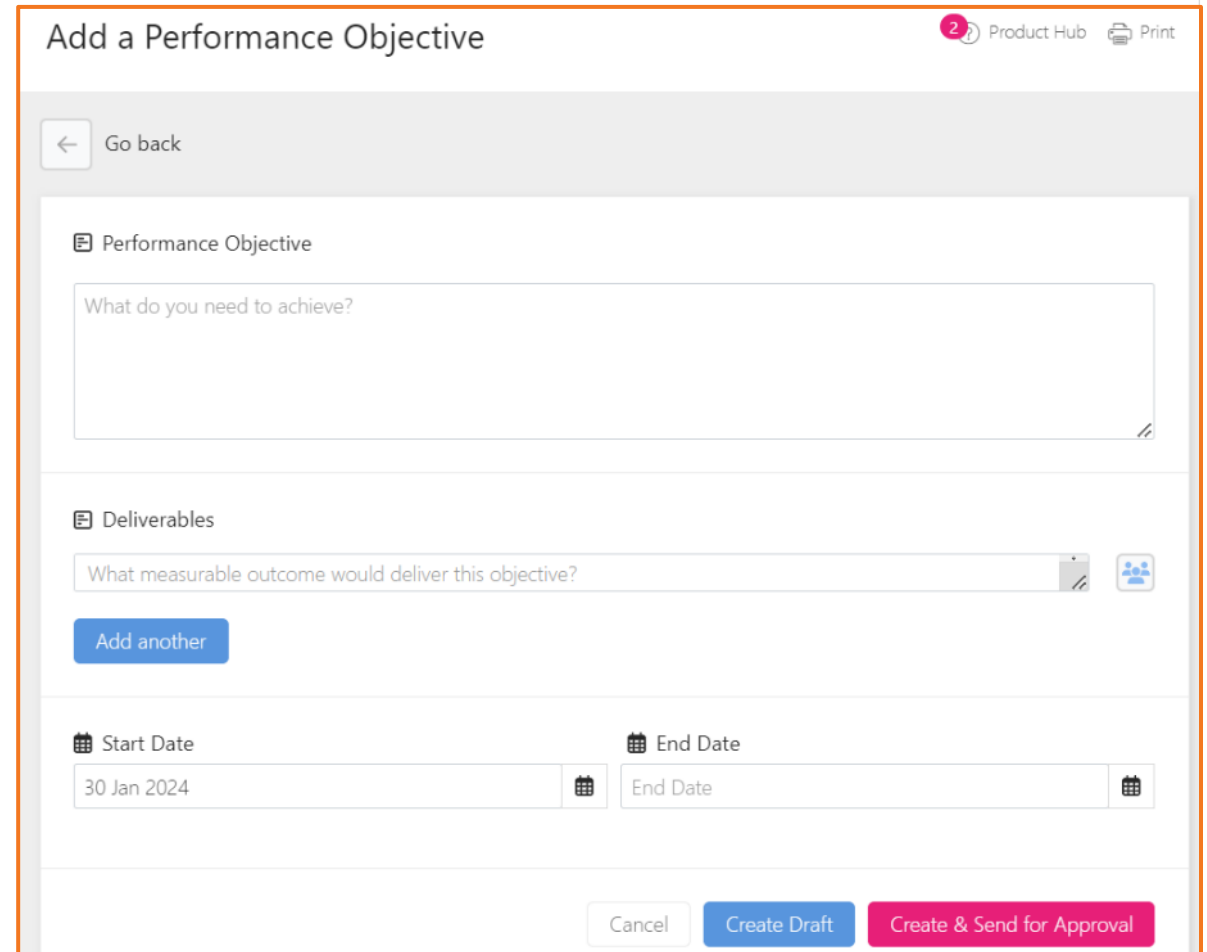


Aspirational – the objective should be stretching yet achievable. Delivery should drive high performance



Creating an Objective in Performance & Talent

- Choose between performance or personal development objectives, clearly defining what you aim to achieve and include supporting deliverables.
- Save your objectives as drafts to submit collectively later or send them individually for immediate approval by your manager.



The screenshot shows a web interface for adding a performance objective. At the top right, there is a 'Product Hub' link with a notification badge and a 'Print' button. The main heading is 'Add a Performance Objective'. Below this is a 'Go back' button. The form is divided into sections: 'Performance Objective' with a text area for 'What do you need to achieve?', and 'Deliverables' with a text area for 'What measurable outcome would deliver this objective?' and an 'Add another' button. At the bottom, there are date pickers for 'Start Date' (set to 30 Jan 2024) and 'End Date'. The footer contains three buttons: 'Cancel', 'Create Draft', and 'Create & Send for Approval'.

2 Product Hub Print

Add a Performance Objective

Go back

Performance Objective

What do you need to achieve?

Deliverables

What measurable outcome would deliver this objective?

Add another

Start Date 30 Jan 2024 End Date

Cancel Create Draft Create & Send for Approval

Managing Objectives in Performance & Talent

- Regularly update the status of each objective and capture your progress updates, and always do this before a 'check-in' or review meetings
- When you've finished working on an objective and it no longer needs to be discussed, you can move it to your history page

Performance Objectives

People - develop the skills, knowledge and motivation of our people and empower them to succeed in their roles

Successfully implement new continuous performance management approach

Due: 31 Jan 2024

Completed: achieved

1 Deliverable

People - develop the skills, knowledge and motivation of our people and empower them to succeed in their roles

Run management training workshops on giving and receiving feedback

Due: 6 Dec 2024

On track

1 Deliverable



When an objective is completed

- When you've finished working on an objective and it no longer needs to be discussed, you can move it to your **history page** by clicking ellipses to the right of the objective.
- If you and your manager agree that an objective should no longer be worked on (e.g. because it is no longer relevant or a project has been cancelled), you can mark it as Withdrawn by clicking Options.

Performance Objectives

People - develop the skills, knowledge and motivation of our people and empower them to succeed in their roles

Successfully implement new continuous performance management approach

Due: 31 Jan 2024

Completed: achieved

...

1 Deliverable

Edit

Withdraw

Move to history

People - develop the skills, knowledge and motivation of our people and empower them to succeed in their roles

Run management training workshops on giving and receiving feedback

Due: 6 Dec 2024

On track

...

1 Deliverable

How to give and receive feedback





Research has found
that giving frequent,
informal and accurate
feedback can increase
performance by...

39%

- Yet most people don't receive anywhere near enough feedback and feedback can tend to focus on negatives
- For optimum performance and motivation
 - individuals should receive feedback at least every **2 weeks**
 - the ratio of positive to constructive feedback should be **3:1**

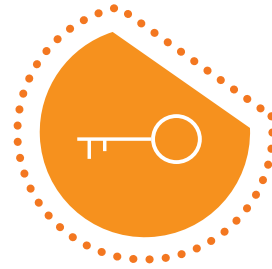
Tips on giving feedback



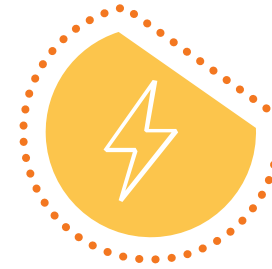
Give the feedback
as soon as possible
after the event



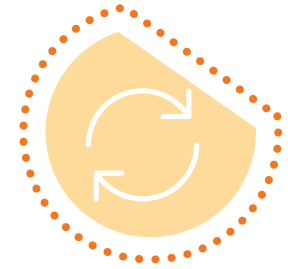
Ensure the
feedback is
accurate



Make the
feedback specific



Explain the impact



Try to give
feedback to your
colleagues
regularly

“

I thought you handled the difficult questions put to us at the project meeting today really well. You kept calm and your answers were really well considered.”

“

Your input at the meeting has really helped to overcome some of the resistance to the project. Thank you!”

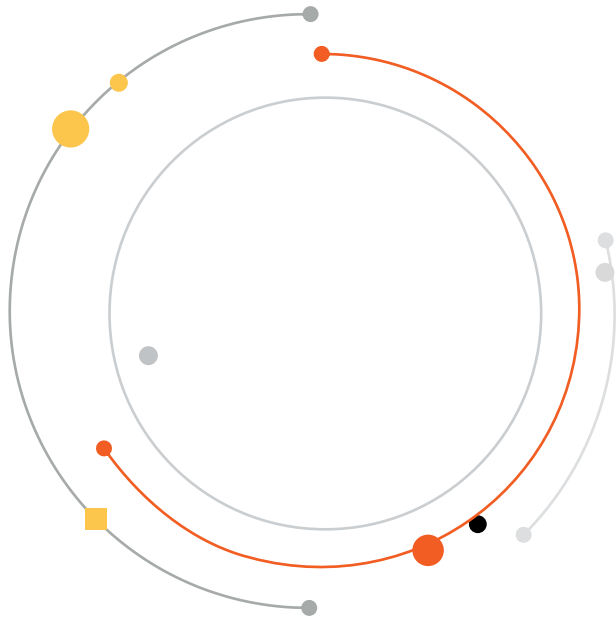


Constructive feedback Vs Criticism

CONSTRUCTIVE FEEDBACK	CRITICISM
<ul style="list-style-type: none">• Calm• Specific, factual• Future-focused• Focus on behaviour• Avoids judgements or interpretations	<ul style="list-style-type: none">• Angry or anxious• General, non-specific• Past-focused• Focus on personality• Judgemental



5 steps for giving constructive feedback



1

Ask permission first

"May I offer you my perspective?"

2

Describe what you observed

"I noticed..." "I heard..." "I saw..."

3

Describe what you observed

"I noticed that you seemed frustrated during our team meeting today and you raised your voice on a couple of occasions. It made me feel pretty uncomfortable and made the meeting atmosphere rather tense."

4

Ask for their response

"So, I'm wondering what was going on for you?"

"How did it seem to you?"

"What do you think?"

5

Agree some actions



Receiving and asking for feedback

Receiving feedback

When it comes to receiving feedback, we often feel uncomfortable, even if it's positive. So, when someone gives you feedback, try to actively listen to what they have to say, without interrupting, and then thank them for the feedback. By doing this, the person is more likely to offer you feedback again in the future.

Asking for feedback

Don't be afraid to ask for feedback, it's the best way to help your personal development. You can request feedback online using Performance & Talent. We recommend that each time you complete an objective or a project, you request feedback from say 2 people who you worked with on it. Performance & Talent makes this quick and easy.

Feedback Homepage




Karishma Kanojia's Feedback

Product Hub Print My Feedback Link Request Feedback Give Feedback

Feedback Received


Search feedback

Create Word Cloud

**Benjamin Longacre**


For the next presentation, you might wish to consider emailing out the handouts to attendees after the event rather than providing printed copies at the meeting.

07 Dec 2023 18:59 [Reply / Thank](#)

**Thomas Roberts**

Thanks so much for the fast turnaround on the report I requested. It really helped me out!

07 Dec 2023 18:59 [Reply / Thank](#)


**Amita Kaur**

My team really enjoyed your recent presentation at the conference, it really helped them to further their knowledge. Thank you!

07 Dec 2023 18:59 [Reply / Thank](#)


Feedback Given

Search feedback

**Colin Turner**

Thanks for staying late last night to get the quarterly HR report finished. It helped me to get it submitted in time for the board meeting.

07 Dec 2023 18:59 [Retract](#)

**Zoe Wallace**

You did a great job on the strategy project; it was completed on-time and met all the requirements. Well done.

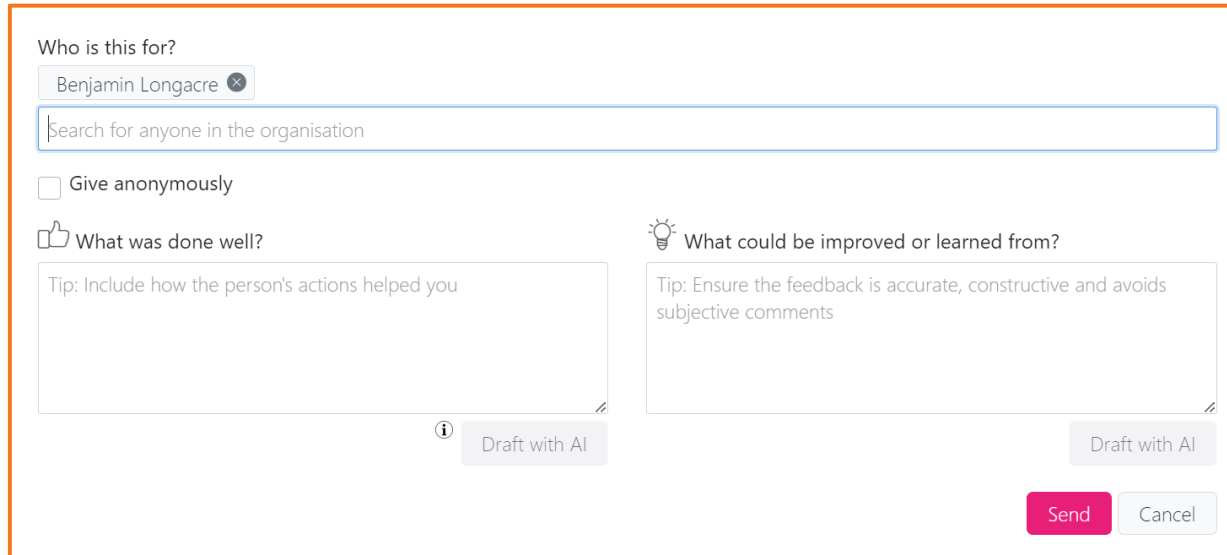
07 Dec 2023 18:59 [Retract](#)

+

- Here you will be able to see all the feedback you have given and received, this is also viewable by your direct manager
- From this page you can remind users of a feedback request they have not yet responded to
- With the '**Create Word Cloud**' button, you can generate a dynamic visual snapshot, capturing key insights from your existing received feedbacks
- You can also retract a feedback request/ given if needed
- You will be able to reply/thank users for feedback directly from this page
- With the '**My Feedback Link**' button at the top-right corner, you will be able to request feedback directly via a link



Using Performance & Talent for giving feedback



The screenshot shows a feedback form interface. At the top, it asks 'Who is this for?' with a dropdown menu showing 'Benjamin Longacre' and a search bar labeled 'Search for anyone in the organisation'. Below this is a checkbox for 'Give anonymously'. The form is divided into two main sections: 'What was done well?' (with a thumbs up icon) and 'What could be improved or learned from?' (with a lightbulb icon). Each section has a text area with a tip: 'Tip: Include how the person's actions helped you' and 'Tip: Ensure the feedback is accurate, constructive and avoids subjective comments'. At the bottom of each text area is a 'Draft with AI' button. At the bottom right of the form are 'Send' and 'Cancel' buttons.

- User can give feedback instantly to their peers or team members at any time by clicking the '**Give Feedback**' button
- When giving feedback, you have two options: either '**Something they have done well**', or '**Something they can improve or learn from**'. This helps to ensure that all feedback is either positive or constructive, rather than criticism
- Using the new feature '**Draft with AI**', you can effortlessly generate well-constructed feedback
- You can give feedback anonymously if your company has this '**Give Anonymously**' feature enabled
- The recipient will then be notified via email once you click **Send**

Using Performance & Talent to request feedback



Who would you like to get feedback from?

Benjamin Longacre ✕

Type to search

External recipients

John Never john@example.com

Add another

Is this feedback relevant to one of your Objectives?

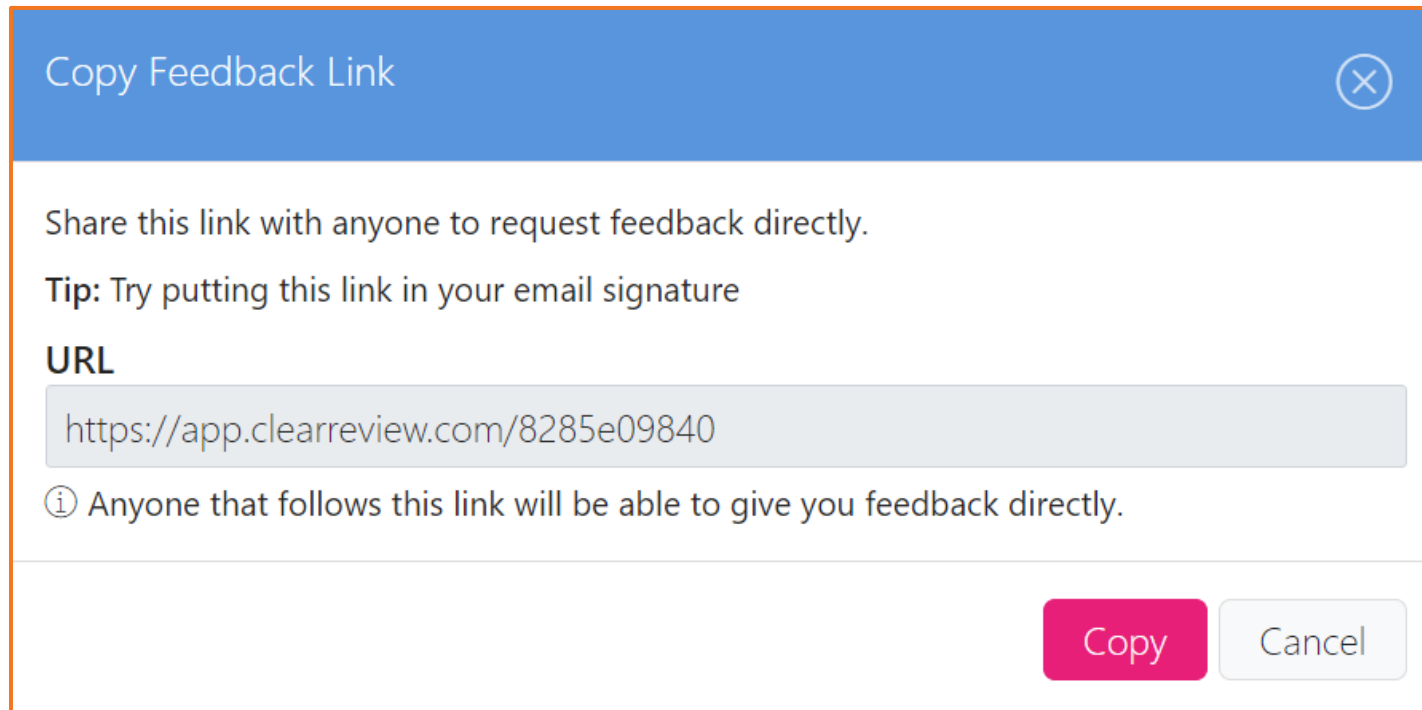
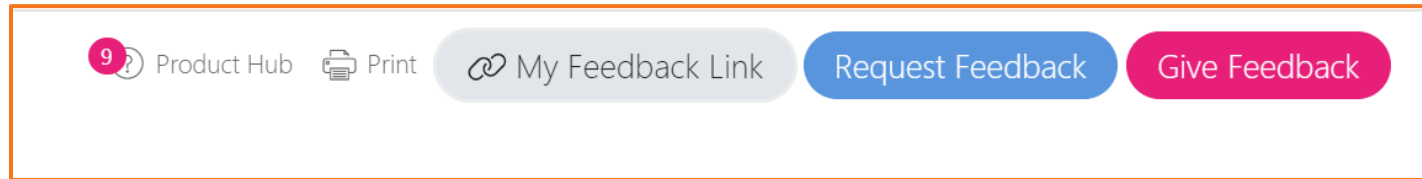
What specifically would you like feedback about?

Send Request Cancel

- Users can also request feedback from peers by clicking the '**Request Feedback**' button. You may wish to request feedback, for example, when you have just finished an objective or a project, from people you worked closely with
- You can request feedback from an external source if your company has this feature enabled
- You can make the request linked to a specific objective, by clicking '**is this feedback relevant to one of your objectives?**'



To request direct feedback via Link



- Users can now send direct link for receiving feedback via "**My Feedback Link**" button at the top right of the Feedback home page.
- You will be able to share this unique link with anyone to request feedback directly.
- Make it convenient for them to provide you feedback using the straightforward My Feedback Link.

How to have Meaningful Conversations





About Check-In conversations

Check-ins are regular one-to-one meetings between individuals and their managers to discuss progress, priorities, issues or concerns, and to give feedback.

- Research has found that people perform better and are **3x** more engaged when they have a regular check-in discussion with their manager
- All team members should have frequent check-ins with their manager.
- Check-ins are most effective when the individual initiates them and takes ownership for them.



What should be discussed in a Check-In

- **Actions from last check-in**

Have agreed actions been completed? If not, what can be done to ensure they are completed in the next week?

- **Performance and Personal Development Objectives**

What progress has been made? Are there obstacles that could prevent them from being achieved on time? How might these obstacles be overcome? Do any objectives need to be added or changed?

- **Feedback**

What things have been done particularly well? What could be done better next time or learned from? What feedback has been given by colleagues or external contacts recently?

- **Using strengths**

Has the individual been able to do what they do best in their role recently? How can they better utilise their strengths on a day-to-day basis?

- **Priorities**

What are the priorities for the next few weeks, both for the individual and the team? Have organisational priorities changed recently?

- **Issues or concerns**

Does either party have any issues or concerns to discuss? What are the potential options for addressing them? What specific actions are going to be taken?

- **Help and support**

What help or support is needed from the manager over the coming weeks?

Preparing for a check in conversation

- The individual should update the status of each of their Objectives and add any relevant updates
- The manager should review the employee's progress against their objectives and any recent feedback. Both parties can view and **print a Summary** from the employee's Conversation page.
- Before you have a conversation, either the individual or the manager should create a **Conversation** record in Performance & Talent

Karishma Kanojia's Conversations

Product Hub Print Add Conversation

Next conversation:
January 18, Thursday
5:30 PM
Check-In
Karishma Kanojia
TODAY

Preparing for Conversations

- 1 Review Actions from your last Conversation.
- 2 Update your progress against your Objectives.
- 3 Read the Prompts for Discussion and prepare your thoughts.
- 4 Add anything else you'd like to discuss to the Meeting Notes.

Summary
Generate a printable summary of your recent activity. Generate

Available Conversations

Check-In Schedule

Onboarding Conversation
A kick-off conversation normally held 2-4 weeks after starting a new role Schedule

Career Conversation
Use when the individual or manager wishes to discuss career progression Schedule

Upcoming Conversations Past Conversations

18 Jan 2024
5:30PM-6:00PM
Check-In
with Karishma Kanojia
Monthly

19 Jan 2024
5:30PM-6:00PM
Check-In
with Karishma Kanojia
Monthly

15 Feb 2024
5:30PM-6:00PM
Check-In
with Karishma Kanojia
Monthly

16 Feb 2024
5:30PM-6:00PM
Check-In
with Karishma Kanojia

Having the conversation

- The conversation meeting record itself is a shared space that both the individual and their manager have access to
- The conversation screen contains a list of tailored discussion prompts that may differ depending on the type of conversation
- You can assign actions to you, or your manager based on discussions
- There is a space for meeting notes, these can be used to refer back to at a later stage

The screenshot displays a web interface for a 'Check-In' session with Karishma Kanojia on January 18, 2024. The interface includes a header with navigation links (Product Hub, Print) and a sidebar with icons for navigation, search, chat, and document management. The main content area is divided into three sections: 'Prompts for Discussion', 'Actions', and 'Meeting Notes'. The 'Prompts for Discussion' section lists five bullet points for discussion. The 'Actions' section contains a form to add a new action, with fields for 'Add action...', 'Owner' (Karishma Kanojia), 'Objective' (Develop team leadership capabilities), and 'Due' (25 Jan 2024), along with 'Add' and 'Cancel' buttons. The 'Meeting Notes' section has a text area for 'Add note...'.

Check-In: Karishma Kanojia

with Karishma Kanojia on 18 Jan 2024 [Change details](#)

Prompts for Discussion

- **Actions from last check-in.** Have agreed actions been completed? If not, what can be done to ensure they are completed in the next week?
- **Objectives.** What progress has been made? Are there obstacles that could prevent them from being achieved on time? How might these obstacles be overcome? Do any objectives need to be added or changed?
- **Feedback.** Review recently received feedback. Does it highlight any strengths or areas for development?
- **Using strengths.** Has the individual been able to do what they do best in their role recently? How can they better utilise their strengths on a day-to-day basis?
- **Issues or concerns.** Does either party have any issues or concerns to discuss? What specific actions will be taken to address them?
- **Help and support.** What help or support is needed from the manager over the coming weeks?

Actions

Add action...

Owner Karishma Kanojia

Objective Develop team leadership capabilities

Due 25 Jan 2024 [Add](#) [Cancel](#)

Meeting Notes

Add note...



How to Manage your Actions



Manage and Keeping track of outstanding Actions

- The Actions screen enables you to keep track of all outstanding actions from your Check-ins or related Objectives
- Automated reminders are sent by email when an incomplete action is due
- Completed actions will still be visible within the Check-in or Objective from which they originated

Karishma Kanojia's Actions 9 Product Hub Print

[Add Action](#)

My Actions

Show: [Completed Actions](#)

This looks empty. Add an Action

[<](#) [>](#) [<](#) [>](#)

Actions by Performance Objectives

[^](#) Successfully implement new continuous performance management approach

Show: [Completed Actions](#)

<input checked="" type="checkbox"/>	Jan 17, 2024	Engagement survey completed	Karishma Kanojia	Edit Delete
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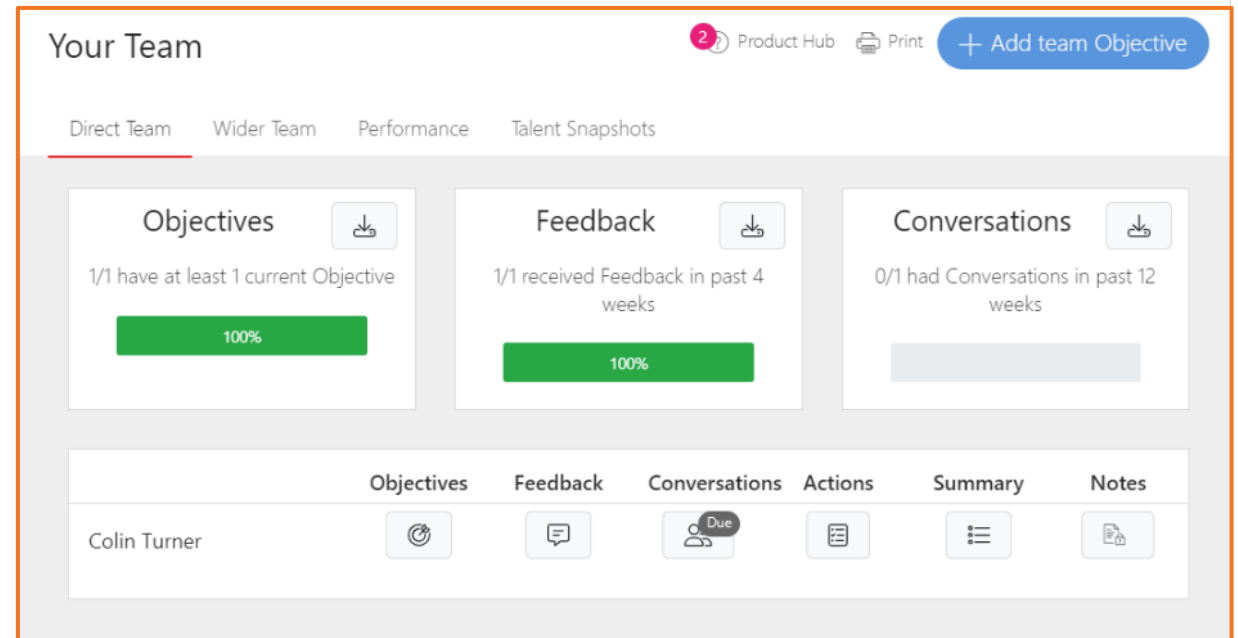


How To Manage Your Team and Create Meaningful Data



Your Team Dashboard (manager view)

- Your Team area provides a dashboard view of your direct reports providing quick access to related areas for your team members
- Flags will appear to indicate areas needing attention
- Click directly into each area to approve objectives, view feedback or schedule a conversation with their team member
- Assign actions, view an employee summary and take private notes
- Download quick reports on your team's progress
- Add a 'team objective' which creates an objective for all direct reports in one go



Wider team Dashboard (senior manager view)

- Senior managers can get a sense for performance up to two levels down via the 'wider team' tab

The screenshot displays the 'Your Team' dashboard for a senior manager. At the top, there's a navigation bar with tabs: 'Direct Team', 'Wider Team' (selected), 'Performance', and 'Talent Snapshots'. To the right of the tabs are links for 'Product Hub' (with a notification badge) and 'Print'. Below the navigation bar, the main content area is divided into two sections. The first section, 'Your Team Members' Teams', contains a table with columns: 'Team Members', 'Current Objectives', 'Recent Feedback', and 'Recent Conversations'. The table has one row for 'Colin Turner' with values: 1, 0%, 0%, and 0% respectively. The second section, 'Reports', states 'You have 2 people in your wider team.' and lists two reports: 'Performance Objectives report' and 'Talent Snapshot responses report', each with a 'Run' button.

Team Members	Current Objectives	Recent Feedback	Recent Conversations
Colin Turner	0%	0%	0%

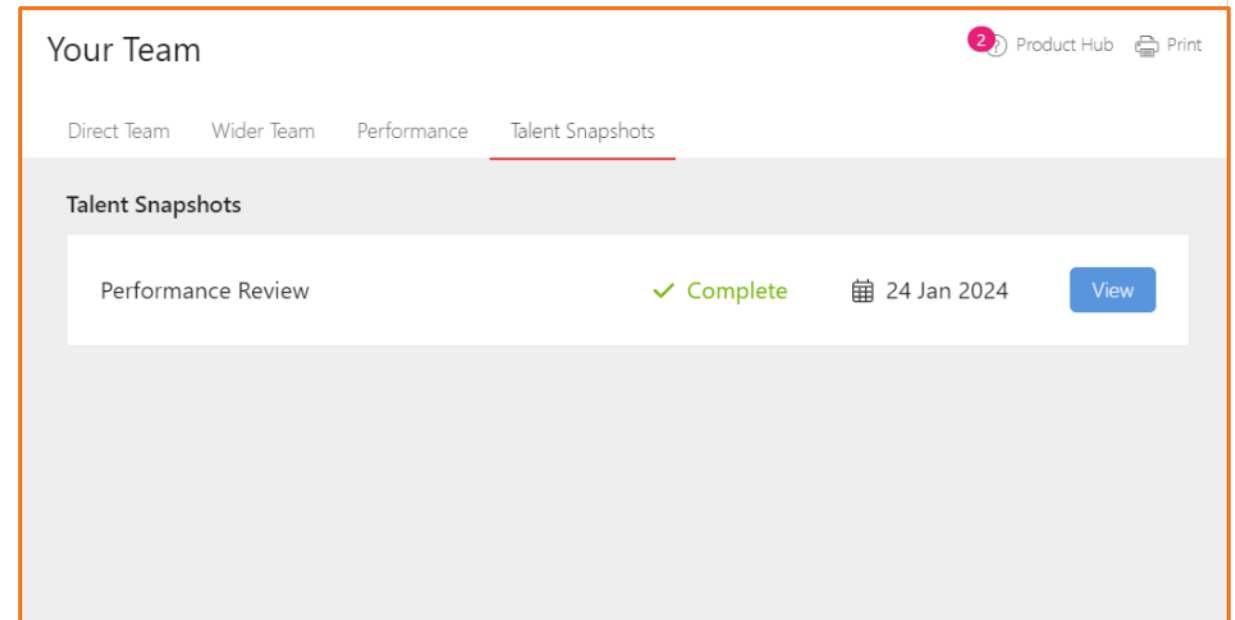
Reports
You have 2 people in your wider team.

Performance Objectives report [Run](#)

Talent Snapshot responses report [Run](#)

Talent snapshot (manager view)

- Managers also can complete Talent Snapshots or quick performance surveys for their direct reports from this area when initiated by an Admin





We hope you have found this helpful! If you would like to learn more please visit [Help | Performance & Talent](#)

Thank you for
your time.





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hello@oneadvanced.com



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