

Chapter 2: Roles and Permissions

Successful performance management relies on clearly defined roles and responsibilities. This chapter delves into the module's specific duties of administrators, managers, and employees. You'll learn how each role contributes to the process, from configuring the system and tracking performance to setting goals and providing actionable feedback.

Understanding these roles ensures a collaborative approach to performance management, where every user knows their contribution and how it ties into the system's overall functionality. This chapter sets the foundation for effective teamwork and accountability by clarifying responsibilities.

- [Employee Roles](#)
- [Managerial Roles](#)
- [Administrator Roles](#)
- [How Performance Management Works](#)

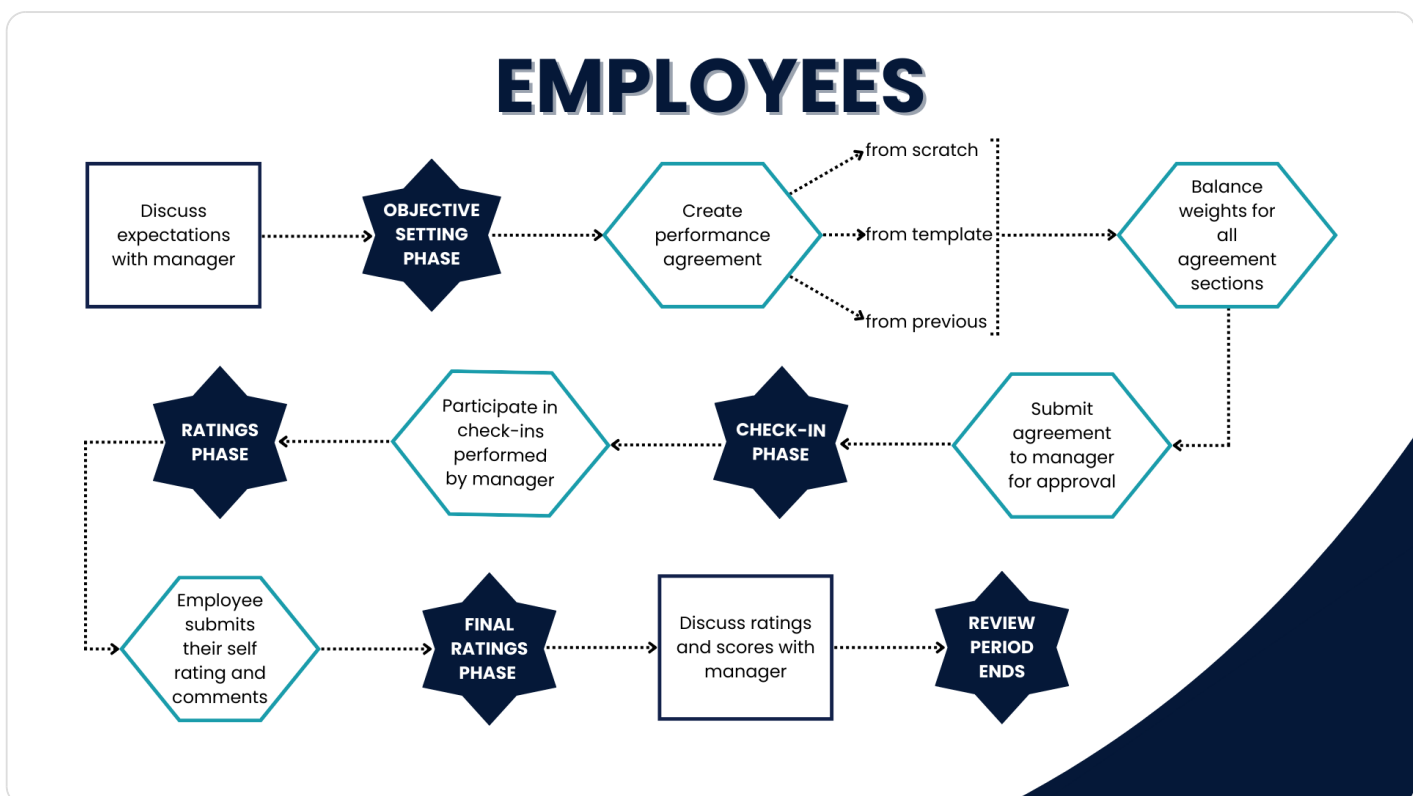
Employee Roles

Employees play a crucial role in setting **goals** and engaging in **performance reviews**, enabling them to effectively contribute to organisational goals while also driving their personal growth.

Several factors contribute to a successful performance management process:

- **Employees:**

- Open communication and mutual understanding between employees and managers are essential.
- Active engagement includes:
 - Setting clear objectives
 - Participating in regular check-ins
 - Self-assessing progress.
- This approach leads to:
 - A sense of ownership over professional development
 - The nurturing of a growth mindset
 - Alignment of personal goals with the company's priorities.



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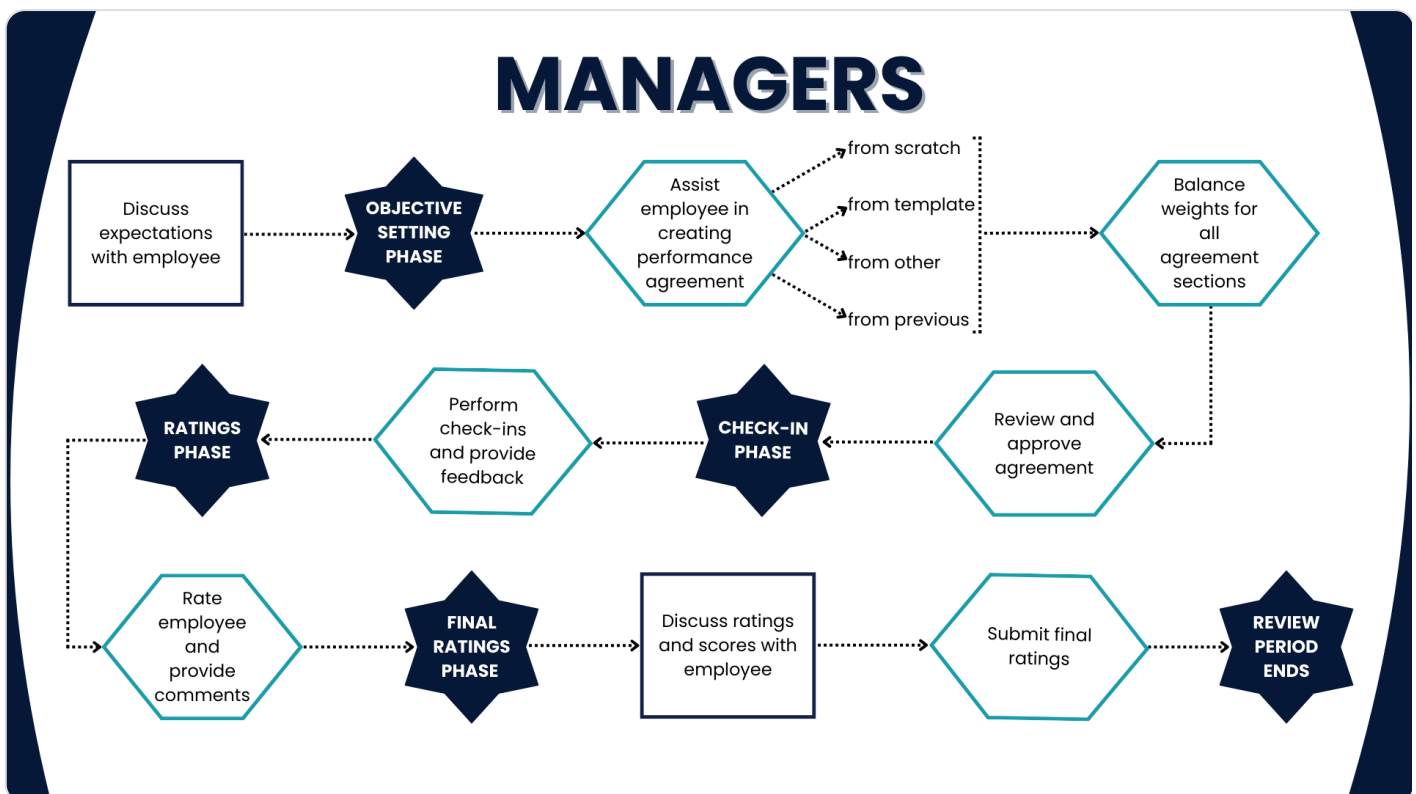
Managerial Roles

Performance managers play an important role in **guiding** and **evaluating** their team. Managers are involved in setting objectives, providing feedback, and conducting performance reviews to drive employee growth and success.

Several factors contribute to a successful performance management process:

- **Managers:**

- Ongoing guidance and constructive feedback help employees stay on track.
- Key responsibilities include:
 - Providing timely feedback and support
 - Discussing self-ratings and providing balanced assessments
 - Adjusting objectives to align with business and individual needs.
- This approach results in:
 - A culture of continuous improvement
 - More accurate and actionable performance outcomes
 - Increased motivation and productivity.



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Administrator Roles



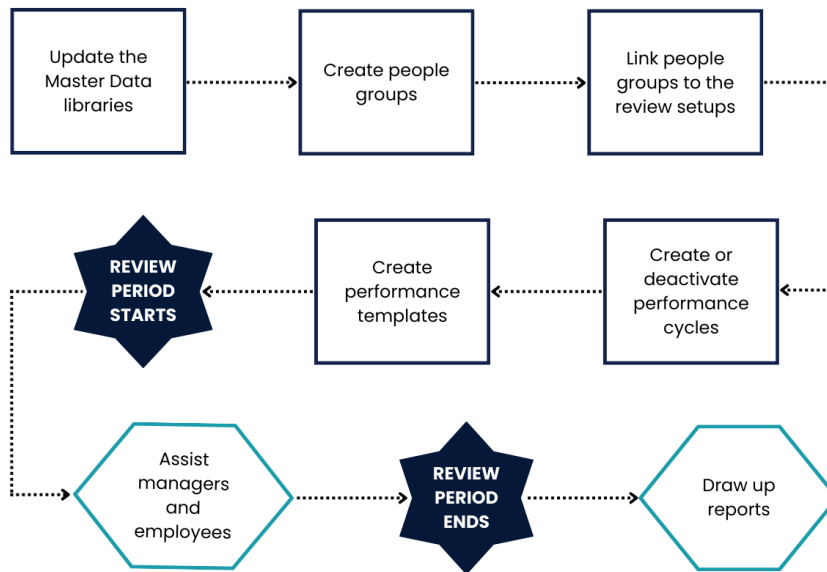
Effective administrators should **manage** and **support** performance **processes** effectively. An administrator has several responsibilities, from configuring system settings to drawing reports, thereby ensuring smooth and accurate performance management.

Several factors contribute to a successful performance management process:

- **Administrators:**

- System accuracy and smooth operation enable an effective performance management process.
- Primary responsibilities include:
 - Managing key data and performance cycles
 - Generating insightful reports for informed decision-making
 - Creating and maintaining agreement templates and review setups.
- This support ensures:
 - A structured and efficient performance management system
 - Clear alignment of reviews with organisational goals
 - A seamless experience for employees and managers.

ADMINISTRATORS



How Performance Management Works



Effective performance management relies on the **collaboration** between employees, managers, and administrators. When these roles work together harmoniously, it creates an efficient and productive environment, promoting individual and organisational growth.

A piggy bank is positioned in front of a target, symbolizing financial goals and savings. The target has a red bullseye in the center. The entire graphic is set against a dark blue background with a large teal circle behind the target and a large magenta circle above it.

The performance management cycle is a continuous process that helps employees achieve their goals and improve their performance.



1

This stage involves setting clear, measurable, achievable, relevant, and time-bound (SMART) goals for employees.



2

Regular check-ins allow managers to provide feedback, monitor progress, and address any challenges employees may be facing.



3

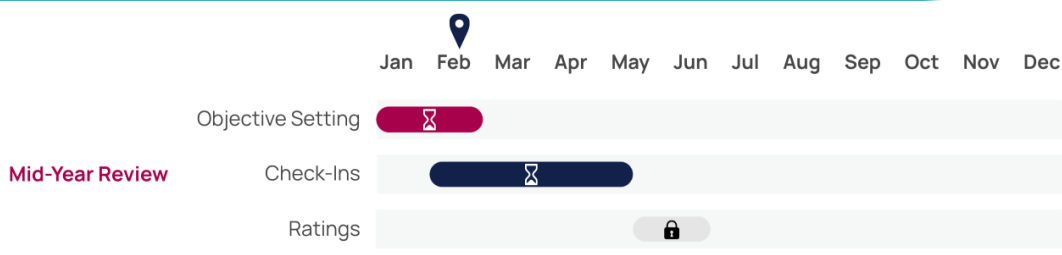
This is a formal assessment of an employee's performance against their set goals and expectations.

An Overview of the Performance Cycle

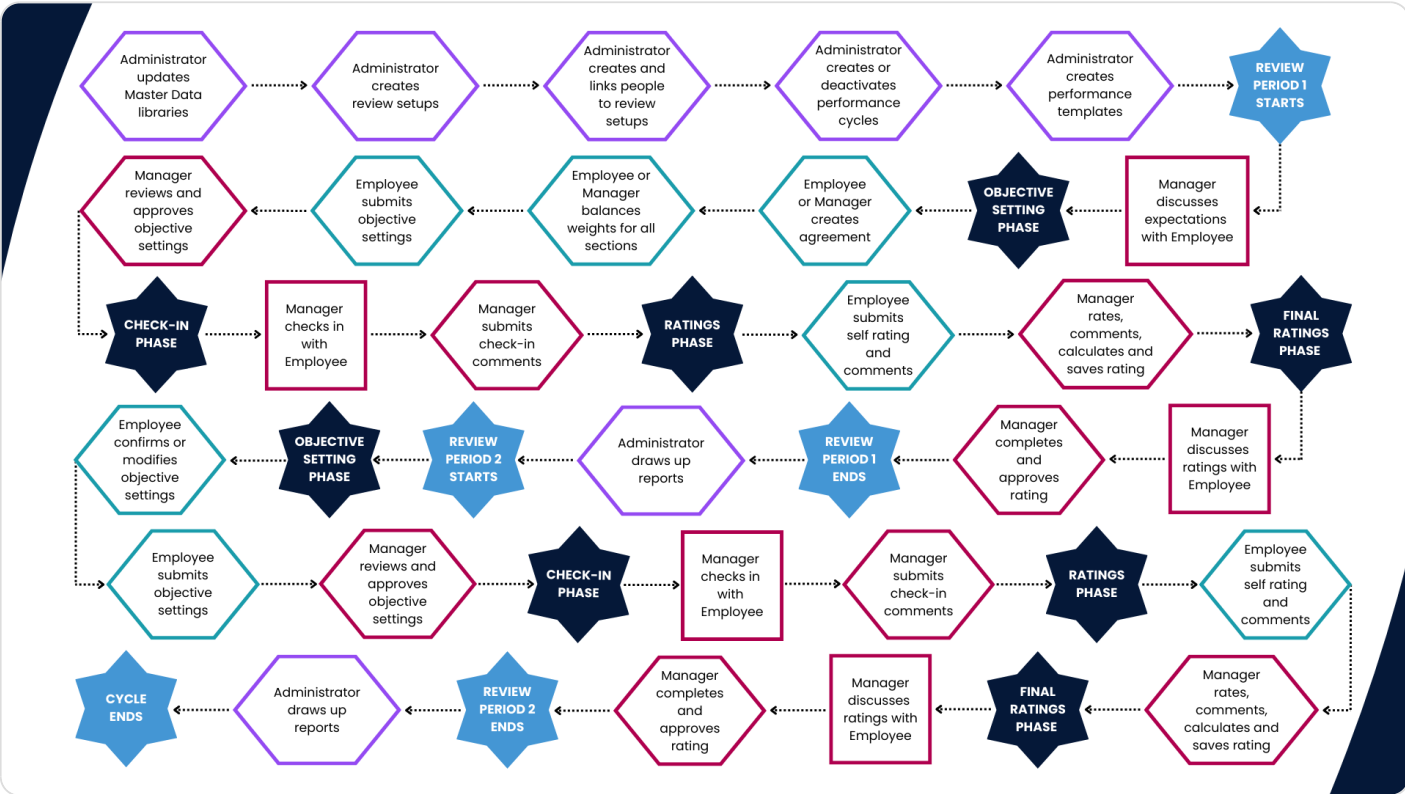
The performance management cycle can be divided into multiple stages, called Review Periods. A Review Year can have one or more Review Periods.

For this example, we will be looking at a performance setup with two Review Periods, namely a Mid-Year Review and a Final Review.

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Below is an example of a performance cycle containing two review periods with check-ins enabled. Performance management requires collaboration and communication between administrators, managers, and employees.



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