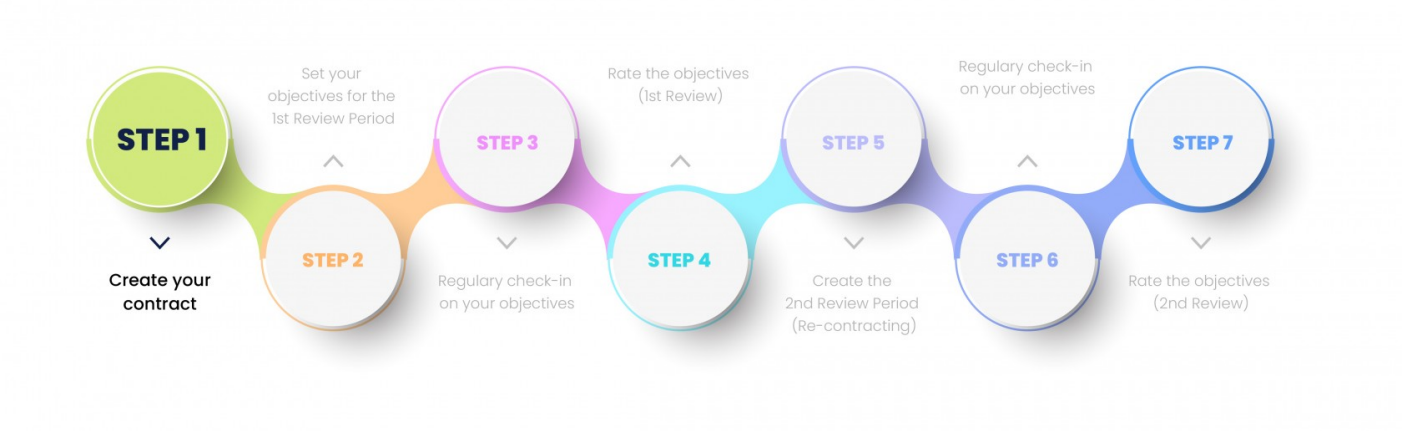
How to Make it a Success

Process: Step 1



Lesson duration

About 5 minutes

What you will **learn:**

- How and what to communicate to your employees and other stakeholders during the Performance Management process.

Communication and Change Management

Managing expectations (and sometimes even fears) is crucial when embarking on a Performance Management process. More so if a new system is part of the package. Therefore, we recommend the following types of communication when you get to this point in the process. The system has a general email that can be configured and scheduled to go out to all involved in the performance management project. See below for a typical example.

Send System Notifications



Dear Jo Soap (615455)

Please note that it is time for you and your performance manager to discuss and load your performance contract for 2021/2022.

You are encouraged to set up a face-to-face discussion with your performance manager to discuss the key performance areas that you will be focussing on for this financial year.

The deadline for the performance agreement to be finalised is **31st of August** (2021).

Where to get help

If you have any questions or concerns, please kindly contact your HR Business Partner.
If you have any technical issues using the platform, please log a call to T-Systems via e-mail or telephone.
Please provide the following when logging a technical request:

- Employee Number/Username
- Description of your query
- Screenshots if possible.

Thank you
Human Resources

Other useful information to communicate to users includes:

> What do the deadlines mean e.g. "The Performance Contract must be loaded, submitted, and approved by the manager by 31st August"?

>

> How many KPAs should there be on a typical Performance Contract?

> Is there a guideline for how many KPIs there should be under a KPA?

> Should the users make use of standard (e.g., industry-specific) KPAs and KPIs, or can they compose their own?

> Will the company be populating the KPA and KPI libraries with examples?

> Can the employees build their own contracts, and only afterwards discuss them with their managers? Or should there be a joint discussion before the contract is created?

> Can the employee and manager make use of contract templates in the library? Are there any templates in the library?

Conduct Short Training Sessions

Sometimes users get stuck on some tiny detail which they are unsure off. Arrange online training sessions, which people can attend at will, and there deal with short, impactful topics which are relevant at this stage of the process. These topics are usually supplementary to the standard training material or emphasise their importance. Examples of training sessions are:

- Copying a user's contract to another user (for managers).
- Constructing a good KPA and KPI.
- Changing the section weight of an agreement.
- Attaching documents.
- Understanding my Performance Dashboard.
- Balancing the weights of perspectives, KPAs and KPIs.
- Submitting my objectives to my manager.
- Reopening my (previously submitted) contract (if I need to make changes).

Share Process Statistics

Besides the relevant upfront communication and guidelines, once the process has started, be sure to keep the momentum by encouraging employees and managers with little bits of information, and more guidance as to what is expected from them.

Use the system reports to extract process statistics and use these to create momentum. See below for an example. This can be sent every week during the peak periods of the process - usually when approaching a deadline.

Remember, your users do not engage with the system daily and people forget a system after a month or two of inactivity. Use every opportunity to push training and guidelines and encouragement to them.

Performance Management Stats as at 10:15 on 28/1/2021

Hi Glenda,

Here is a breakdown of your performance management progress, highlighting where you have to focus. We would like to wrap up the Mid-Year Review phase by 11th Feb.

See below a summary of the whole organisation's progress. Please note it includes only people who actually started their contracts. Non-starters are omitted here.

Bi Annual	Objective Settings	Started		474
		Completed	Employee	447
			Manager	435
	Mid-Year Review	Started		250
		Completed	Employee	227
			Manager	162
	Objective Settings Updated	Objective Updated		0
		Completed	Employee	14
			Manager	14

You have 45 people in total who are currently part of the PM rollout. Find below a breakdown.

Objectives Phase

1. Employees who started and submitted their contracts and had the objectives approved by their managers (These can all start their reviews immediately) = **32**
2. Managers who still need to APPROVE the objectives of employees (before the employee can start the review) = **0 (Well done!!)**
3. Employees who started, and their manager(s) have already approved their mid-year objectives, but the employee(s) STILL HAVE TO SUBMIT = **3**
   (These employees won't be able to score their contracts unless it is submitted first)

					Mid-Year Objectives			Mid-Year Review			Final Review Objectives	
						Submitted	Approved		Submitted	Approved	Submitted	Approved
Employee Number	Employee Name	Employee Surname	Position Title	Line Manager	Started	Employee	Manager	Started	Employee	Manager	Employee	Manager
1234	Jean	Smit	Engineer: Machine Services	Piet Du Toit (947)	Yes	No	Yes	No	No	No		
321	Pete	Rajh	Engineer: Instrumentation	Piet Du Toit (947)	Yes	No	Yes	No	No	No		
4567	Werner	Oelofse	Engineer: Production Services	Piet Du Toit (947)	Yes	No	Yes	No	No	No		

4. Employees who started but haven't SUBMITTED THEIR OBJECTIVES yet = **1**

					Mid-Year Objectives			Mid-Year Review			Final Review Objectives	
						Submitted	Approved		Submitted	Approved	Submitted	Approved
Employee Number	Employee Name	Employee Surname	Position Title	Line Manager	Started	Employee	Manager	Started	Employee	Manager	Employee	Manager
7055	Lyle	Peters	Engineer: Junior	Werner Oelofse (4567)	Yes	No	No	No	No	No		

5. Employees who haven't started doing their objectives yet = **3**

Employee Number	Employee Name	Employee Surname	Position Title	Line Manager	Performance Agreements Allocated
2111	Paula	Nkosi	Clerk: Accounts	Zarah Parker (5111)	No
3555	Lenay	Roos	Clerk: Materials Administration	Zarah Parker (5111)	No
7263	Misha	Jeffer	Occupational Health Nursing Practitioner	Zarah Parker (5111)	No

Mid-Year Review Phase

6. Employees who started, submitted and got their Mid-Year Review periods approved, and then scored their periods and also proceeded to create their Final Review period = **2 (These are your stars!)**

					Mid-Year Objectives			Mid-Year Review			Final Review Objectives	
						Submitted	Approved		Submitted	Approved	Submitted	Approved
Employee Number	Employee Name	Employee Surname	Position Title	Line Manager	Started	Employee	Manager	Started	Employee	Manager	Employee	Manager
4222	Hilton	Federer	Superintendent: Logistic BVL	William Du Preez (12345)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
3265	Erico	Lanard	Superintendent: Forming	William Du Preez (12345)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

7. Managers should be **doing and/or approving** the reviews of employees = **1**

					Mid-Year Objectives			Mid-Year Review			Final Review Objectives	
						Submitted	Approved		Submitted	Approved	Submitted	Approved
Employee Number	Employee Name	Employee Surname	Position Title	Line Manager	Started	Employee	Manager	Started	Employee	Manager	Employee	Manager
4567	Valancia	Weideman	Facilitator	Jenni Daniels (896)	Yes	Yes	Yes	Yes	Yes	No		

8. Employees who need to **complete** their reviews and **submit** it to their managers = **1**

					Mid-Year Objectives			Mid-Year Review			Final Review Objectives	
						Submitted	Approved		Submitted	Approved	Submitted	Approved
Employee Number	Employee Name	Employee Surname	Position Title	Line Manager	Started	Employee	Manager	Started	Employee	Manager	Employee	Manager
6119	Tamara	Pele	Engineer: Quality	Gerard Scheuer (8899)	Yes	Yes	Yes	Yes	No	Yes		

9. Employees who **should be starting** their mid-year reviews = **2**

					Mid-Year Objectives			Mid-Year Review			Final Review Objectives	
						Submitted	Approved		Submitted	Approved	Submitted	Approved
Employee Number	Employee Name	Employee Surname	Position Title	Line Manager	Started	Employee	Manager	Started	Employee	Manager	Employee	Manager
9874	Andre	Beetge	Manager: Plant	Stephen Van Eck (3044)	Yes	Yes	Yes	No	No	No		
4623	Elmer	Isaacs	Clerk: Accounts	Zarah Parker (5375)	Yes	Yes	Yes	No	No	No		

Regards

Your Performance Administrator

Recommended further reading

- Glossary of terminology and definitions
- How to Use Performance Management with Success
- The Employee's Performance Management Dashboard
- Open an Existing Contract
- Create a New Contract
- Functionalities and Layout of the Performance Management Dashboard
- The Manager's Performance Management Dashboard
- Overview of The Performance Agreement Screen
- Set your objectives - Part 1 (Working with KPAs and KPIs)
- Set your objectives - Part 2 (Working with the other sections)
- Perform a Check-in
- Rate your objectives



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