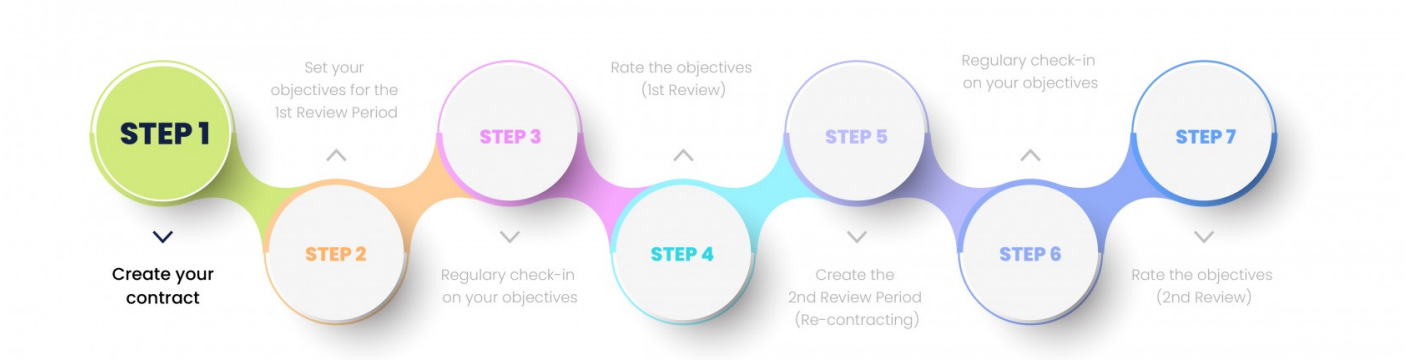
The Performance Management Dashboard - For Managers

Process: Step 1



Lesson duration

About 15 minutes

What you will **learn:**

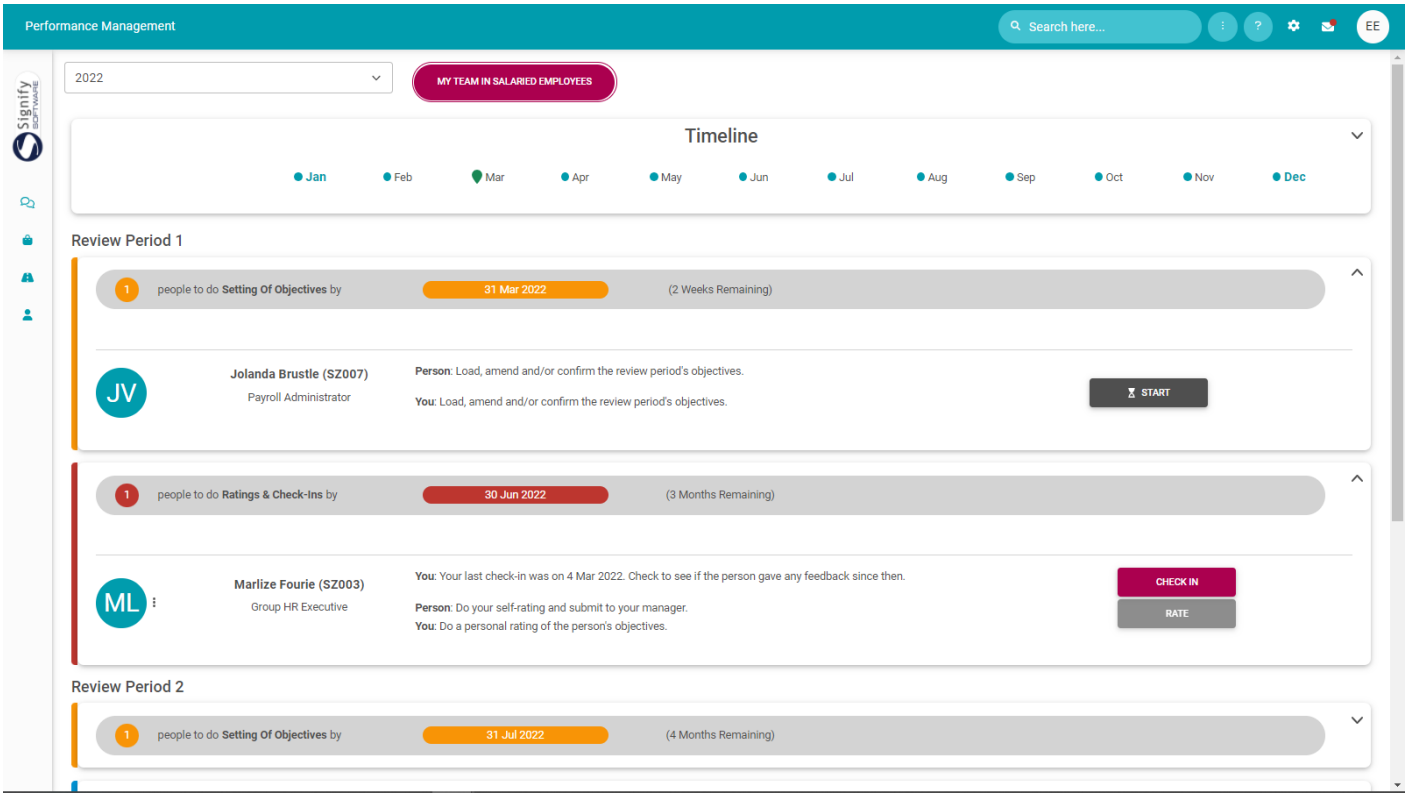
- What managers **can do** on their dashboards.
- How to **switch** between groups of people.

- How to know **what to do** when managing contracts.
- How to **access** employee contracts.

The Performance Management Dashboard for Managers

Every user forming part of the Performance Management process gets access to their own Performance Management Dashboard. If a person manages other users or employees, the person fulfils the role of performance manager and gets access to a Performance Management Dashboard for Managers.

The activities described below are from the viewpoint of a performance manager, assisting their employees during the performance management process. Except for the submission of objectives (done by an employee themselves) and the submission of self-rated objectives (also done by an employee), a performance manager has control over all aspects of an employee's Performance Contract. If you are a performance manager, we recommend also viewing The Performance Management Dashboard for Employees section. On this page, we will focus on additional functionalities only.



What can a manager do on the Performance Management Dashboard for Managers?

- Manage their own Performance Contract (in their capacity as a regular user).
- Manage the performance contracts of the manager's own, direct reporting lines.
- Manage the performance contracts of ad-hoc groups of people - if assigned to this manager.
- Create a new performance contract for their employees.
- View existing and previous Performance Contracts of employees.

Determine the progress of a Performance Contract phase of an employee and determine the next step.

Get overall progress stats for his/her department.

Print employee contracts.

Perform Check-ins on employee performance agreement objectives. And view the reply from the employee.

#1 Switch between groups of people

A performance manager has access to their own Performance Management Dashboard, similar to those of other users, as seen below. However, a manager can also switch to a separate view which allows for the management of the Performance Contracts of other users.



- At the top of the dashboard page, select the applicable performance year, then click the toggle button to switch to the contracts of that team.



The view displays the regular performance cycle timeline, as well as a list of employees or users in the selected group.
Note that you could have access to 3 types of people or people groups via the toggle button. Although the groups - and your responsibilities towards them - may differ, you have the same access (features and functionalities) to the individuals.

Your own Performance Contract

Employees reporting to you as their direct line or performance manager.

> Employees in other groups (e.g. Senior Management). These do not necessarily report toyou, but you might be responsible for their Performance Management.

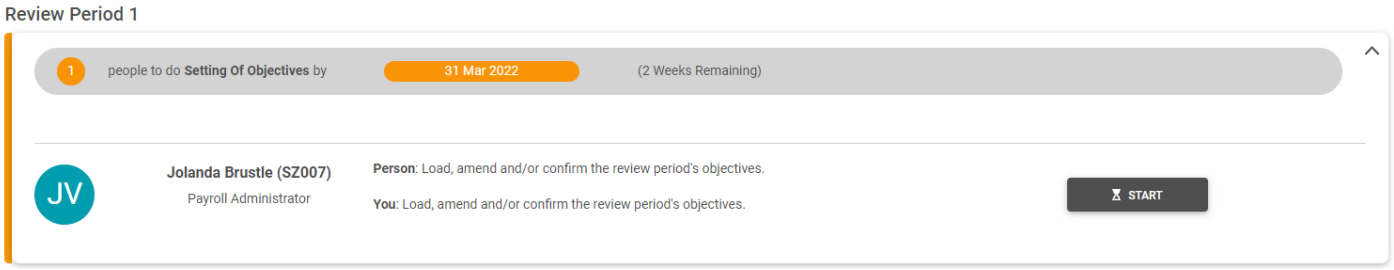
#2 Where should you focus?

Managing several employees with contracts in various stages and phases of the Performance Management cycle can be daunting.

We took the guessing out of the management by grouping the employees according to the following phases. Just note the phases will repeat for each review period in the Performance Contract.

As a manager, you can assist with every step, but in the tables below, we assume the employee will perform their tasks to the fullest.

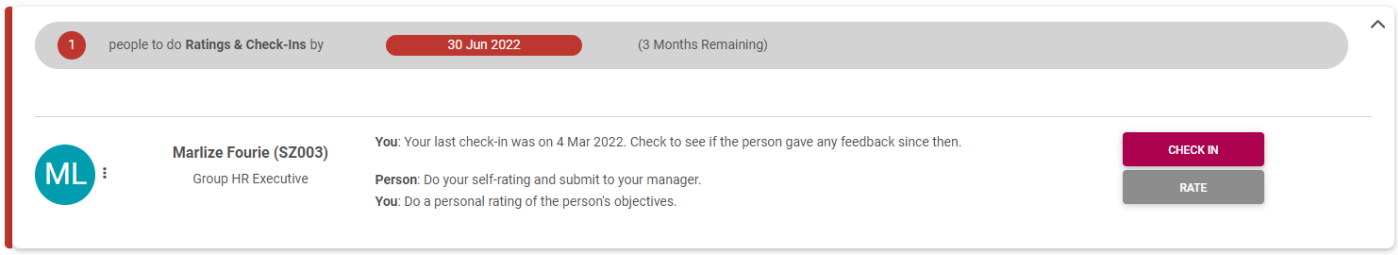
This employee is in the Objective Setting phase.



And this is what is supposed to happen.

EMPLOYEE'S ACTIONS	THE MANAGER'S ACTIONS
• Create their Performance Contracts. • Discuss and confirm their objectives with the manager • Load the objectives into the agreement. • Submit their agreement for your approval.	• Discuss and confirm the objectives with the employee. • Approve the agreement.

This employee is in the Rating and Check-in phase.

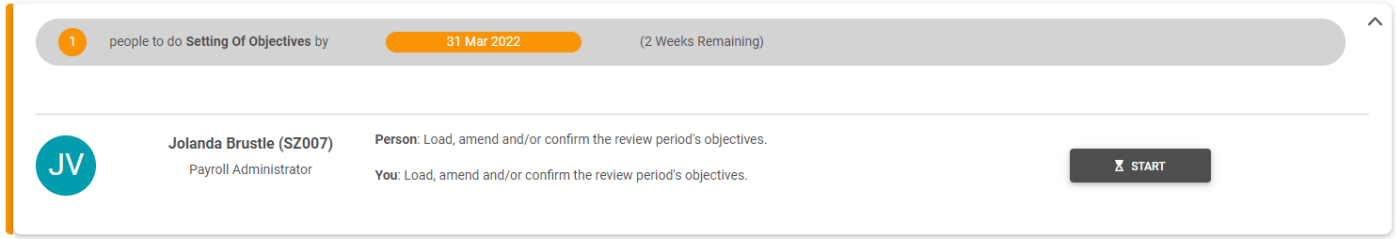


And this is what is supposed to happen.

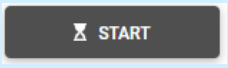
EMPLOYEE'S ACTIONS	THE MANAGER'S ACTIONS
• Reply and act on any Check-in guidance the manager may have given if the Check-ins are open. • Do a self-rating on their objectives once the rating phase is open. • Submit the self-ratings.	• Do occasional Check-ins on employee objectives, and guide as needed, if the check-ins are open. • Do a personal rating of the employee's objectives once the rating phase is open. • Discuss the employee's self-rating versus your personal ratings, then provide the objectives' final ratings. • Approve the review period.

#3 Access the agreements of employees

If employees have been linked to a manager, the manager can perform all actions on the employee Performance Contracts, except submitting the objectives and ratings.



The following actions are at the manager's fingertips.



Click **START**, **CONTINUE**, **RATE,** and/or **VIEW** - or whatever the phase requires.



Click **DELETE** to clean out all the review period's objectives and start over.

Click the **More** or **Action Plan** icon to print the contract, and to see all uploaded documents.

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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