10 Practical Steps to Evolving Your Performance Management Process

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PEOPLE MAKE
ALL THE DIFFERENCE

> "**At its core, a good performance review process ensures timely, ongoing dialogue which includes usable, constructive feedback on behaviours as well as clear performance goals, and helps the employee to reach and sustain top performance**."
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> *From "Performance Management: One size fits none?"*
> *by Derek Carter, thrive Consulting*

Step 1: Take stock

The first step is to take stock of your existing and desired organisational culture, near-term and future strategy, your current and required levels of performance and behaviour, and the state of the performance management process itself *(e.g. levels of buy-in and usage; impact / value delivered; quality of data / insights delivered; connectedness to other processes).*

Step 2: Be clear on what the process is for

Design the process based on what you need out of it. If you are on a journey of "good to great", yours won't be the same as another organisation's that needs to focus on talent management, rapid growth, or being sold. Just remember, the process shouldn't only be about measuring and reporting on historic performance - it must actually *drive* future performance.

Step 3: Decide whether to repair, revamp or replace

Once you've completed Steps 1 & 2, the best option should be clear, but be mindful of the risks of being either too conservative or too reckless. To find the required middle ground, don't make this decision only around the board table, or the HR office – invite input from across the business and take their feedback on board before deciding what's needed.

Step 4: Put users' needs first

For maximum buy-in, your process and tools (forms, software, etc.) need to be designed with the users in mind. HR, OD, Talent Management and L&D departments all benefit from the data captured, but make sure to avoid the trap of putting *their* needs above those of the employees and managers that will be using the tools.

Step 5: Collaborate to create

In keeping with the previous 2 steps, and in a way that makes sense for your organisation's size and structure, involve users from across the business to have input into the evolved process. This will not only result in better trust and buy-in at re-launch, but will doubtless result in a better process overall, too.

Step 6: Keep it simple

Avoid any temptation or tendency to make things complex or overly-sophisticated. Less can be more, if it's designed right. Bear in mind your peoples' levels of readiness and ability to use the tools. Be on the lookout for opportunities to reduce, remove, and refine.

Step 7: Conduct user tests

Run some tests (make them as realistic as possible – maybe even consider a pilot if you have the time) and gather information on ease of use, time required, quality of conversations and impact on the people involved in terms of their motivation and relationship with each other.

Step 8: Finalise the process

Once the tests are completed, you can factor in feedback and observations to finalise the process. It probably won't – and doesn't have to – be perfect. If you've followed these steps, it will be perfectly fit for purpose and ready to launch.

Step 9: Equip and enable everyone

In all your communications and training events, make a big deal of **what** has changed, **why** it's changed, **how** you did it (i.e. in an inclusive, user-focused way) and what the **benefits** are for everyone. You'll also need to develop the necessary knowledge and skills in people to make the most of your new process – especially if some new element of technology is being introduced. But, primarily, prepare people for the types of conversations you want them to have.

Step 10: Launch, look and listen

Remember, even after re-launch, it needs to be an ongoing process of evolution to ensure the process is doing what it is supposed to do. So, make sure to gather and take appropriate action on reactions, feedback and issues.

Best of luck!

Certainly, evolving your process is a difficult but very necessary undertaking, so good luck with it and feel free to get in touch if you need any help.

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