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Evaluating Performance Management Systems

You've identified that you have a challenge. And it could potentially be a very big one. Your performance management process isn't working efficiently. And it's impacting all of your people. We chat with individuals every day who are researching just how to meet this challenge. If we've learned one thing during our decade of experience working with HR teams and their counterparts, it's that performance management can be a bear. When it comes to performance management, one size certainly doesn't fit all. So we put together this template to assist with identifying just what steps need to be taken to get performance management on track.

Welcome to your definitive performance management evaluation worksheet. The perfect place to gather your thoughts, identify your issues and focus on what comes next.

IDENTIFY ISSUES

Are you purchasing a performance management system for the first time?　Y　N

If yes, what is your current process for conducting performance reviews or managing performance?

Are you changing from another performance management system to something else?　Y　N

If yes, list the things you like about your current system. Be specific.

List the things you dislike about your current performance management system and its effects on the organization:

INTERNAL CONSIDERATIONS

What is the business case for selecting or changing your performance management system or process?

If you cannot clearly show the problems you identify above are affecting productivity, employee turnover or client satisfaction, you might be hard pressed to find the budget to finish the project. Select a metric that illustrates your point and obtain the following:

- Industry statistics for competitors or similar companies
- Best use case examples from vendors after implementing a performance management system
- Analyst findings/reports around companies with performance management processes in place
- Your current performance management...performance

Identify Stakeholders: Who will want to work on this project? Who needs to be on this project? In the matrix below, identify the stakeholder, their title, and accountability within the project scope. In the skill level box, select what skills, if any will be needed to complete the project.

NAME	TITLE	DUTY	SKILL

Measurement: Using your answers from the IDENTIFY ISSUES section, try to identify a few ways in which you and your team will measure success. Write these down here:

DESIGN

Performance management systems are not all created equal. Every organization has different processes, different issues, different motivators. Defining your specific needs will go a long way in helping you determine which system is the best fit for you down the line:

Do you want to (put these in order):

_____ Improve organizational results

_____ Focus on strategic performance priorities

_____ Shift focus during times of change

_____ Develop employees

_____ Align company goals

_____ Raise the performance bar

_____ Attract and retain HIPO employees

_____ Improve relationship with colleagues and employees

_____ Increase meaningful work for employees

_____ Build teams and increase cooperation across the enterprise

_____ Identify opportunities for succession planning and advancement

_____ Make goals and objectives more clear

A performance management system, at minimum should provide these basic functions:

● Automate job openings and pre-populate job descriptions
● Align performance with pre-set goals
● Standardize employee performance reviews
● Organize the talent acquisition and management process

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Additional functions may include:

- Deconstructing goals into easy to implement steps
- Priority lists and/or reminders for users
- Reallocation of resources when project priorities shift
- Real time progress updates
- Visual representation of progress, goals and resources
- Public recognition functions
- Social collaboration elements
- Communication within the platform
- 360 performance reviews
- Automated reviews

QUESTIONS TO ASK

Which of the features above does my company need?

Think in terms of what your team needs 3-6-12 months from now. Will social collaboration be important then? What about real-time progress?

Which of these features are a "nice to have"?

How hard is it to use?

Lots of systems work perfectly in the demo environment but confound post-implementation. Ask for references of companies similar to your size and industry, to see if a team like yours can work within the same environment. Ask about additional training options before, not after, you make a decision.