



# **THE ULTIMATE GUIDE TO PERFORMANCE REVIEWS**

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# 1. INTRODUCTION

Performance management has been a hot topic for at least 100 years. This is because, when done right, high performing organisations outperform the competition in the following ways:



**1.4X MORE LIKELY**  
to meet financial targets



**2.2X MORE LIKELY**  
to improve efficiency



**2.4X MORE LIKELY**  
to innovate



**4.9X MORE LIKELY**  
to manage change



**1.7X MORE LIKELY**  
to delight customers

Source: [Deloitte](#) Human Capital High Impact Performance Management

## But...

It can be a complicated process that consumes a lot of financial resources and time, involves a lot of paperwork, and sometimes fails to make a positive contribution to a business. Investment in performance management activities is only really justified if it helps to improve employee engagement and performance.

**So how can we make our performance management more useful?** This is what we outline in this e-book. First, we look at how performance management is changing and assess the biggest barriers to successful implementation. Last but not least, we consider the actions that can help with aligning performance management with business goals. Offering some practical steps that can help you create a better performance review approach, building trust and ultimately growing performance management to be a strong organizational muscle.

## 2. HOW IS PERFORMANCE MANAGEMENT CHANGING IN 2022 AND BEYOND?

**Only 21% of workers across the globe feel engaged with their work. Low engagement alone costs the global economy \$7.8 trillion.**

**Improving the employee experience through a more in-depth performance management strategy is the key to increasing this engagement.**

The COVID-19 pandemic accelerated a number of performance management trends which were already in motion throughout the business world prior to the global emergency.

Companies transitioning away from the traditional model of annual appraisals – which were characterized as diagnostic and reactive – are increasingly implementing performance management models which involve regular processes with an emphasis on talent management and employee well-being (often seeing the two as intrinsically interlinked).

Even before the pandemic many HR leaders were experimenting with different ways to improve their performance management but weren't sure if those efforts were paying off.

McKinsey's article, [Strategic talent management for the post-pandemic world](#), highlights 5 key elements chief HR officers need to address as part of their talent management playbook:

Source: [Gallup](#)



## 2.1. IMPORTANCE OF HIGH PERFORMING ORGANISATIONS

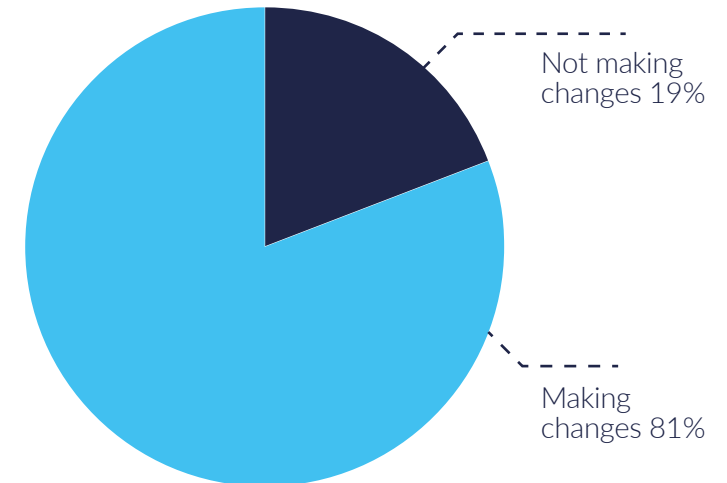
**High performing organizations understand how regular feedback mechanisms are crucial for instilling confidence in their employees, creating a mindset oriented towards progress and growth, centered around effective feedback and in-the-flow development.**

High-performing organizations experience a variety of tangible benefits in comparison to their low-performing counterparts. These include: increasing the likelihood of addressing workforce development needs, offering continuous development for leaders, improving workforce engagement and encouraging an appropriate level of risk taking which leads to innovative solutions and a more dynamic approach to problem solving.

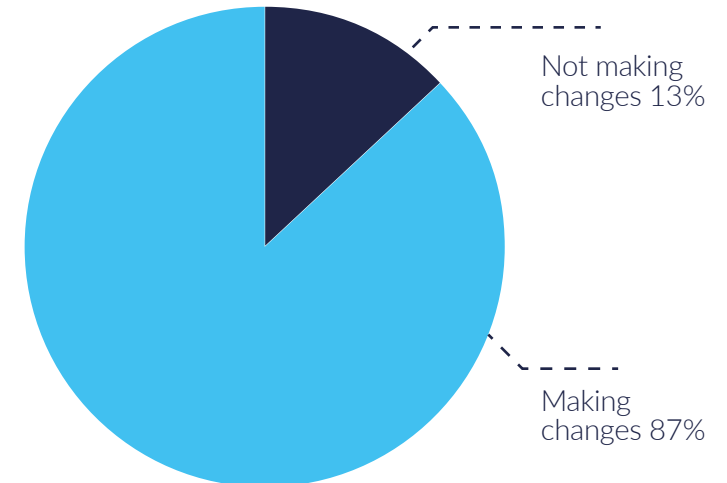
While HR leaders are increasingly adopting these new methods, data from Gartner indicates there is still work to be done to give leaders the confidence to invest focus and energy in these adjustments

### Percentage of HR leaders making changes to performance management

2019:



NOV 2020:



## 2.2. INCREASING EMPHASIS ON EMPLOYEE EXPERIENCES

**As employee experiences increasingly become a focal point for HR leaders and managers, new models of leadership have emerged in every industry.**

**These understand the totality of an employee's journey within the company, from the onboarding process through to promotion and their last working day.**

**77% of companies plan to focus on the employee experience to increase retention rates. However, only 16% of companies use technology to monitor employee engagement levels.**

Sources: [Gartner](#) & [LinkedIn](#)

This emphasis on employee experiences can be improved in a variety of ways:

- Aligning personal development plans to the broader goals of the company.
- Using onboarding programs to boost the culture and values of the organization.
- Implementing continuous feedback mechanisms to keep managers and team leaders on top of employee developments.
- Establishing rewards and achievements to boost the profile of high performing employees and model their behaviour to the wider workforce.
- Make physical and mental well-being a core element of performance management strategies





## 2.3. MOVING FROM ONCE-A-YEAR APPRAISALS TO REGULAR CHECK INS

Old habits die hard, and many businesses are still clinging on to the traditional model of annual appraisals as the core element of their performance management strategy.

The Harvard Business Review's article [The Performance Management Revolution](#) succinctly summarizes the importance of shifting from this model to one of continuous feedback:



With their heavy emphasis on financial rewards and punishments and their end-of-year structure, annual reviews hold people accountable for past behaviour at the expense of improving current performance and grooming talent for the future ... **regular conversations about performance and development change the focus to building the workforce your organization needs to be competitive both today and years from now.**

Regular conversations allow leaders to keep their finger on the pulse of the business in real-time so that problems are addressed long before they become insurmountable.

One of the main barriers to conducting regular reviews is the perceived time involved. However, the right performance management tools can ensure that managers and leaders can schedule and conduct regular feedback sessions without impacting negatively on their time management.

The screenshot displays a user interface for adding a review template. The top section, titled '+ Add Review Template', instructs the user to 'Choose the type of review you want, select from existing templates, or select Custom to create a review.' Below this, there are four template options: 'Monthly' (represented by a calendar icon), 'Quick' (represented by a clock icon), 'Custom' (represented by a gear icon), and 'Wellbeing' (represented by a heart icon). A 'Next' button is located at the bottom right of this section. The second part of the screenshot shows a 'Monthly One 2 One' review form. It includes a section for 'Quantity of work' with the question 'Does the employee complete his or her share of the assigned work load?' and five radio button options: 'Needs improvement', 'Requires development', 'Meets expectations', 'Exceeds expectations', and 'Exceptional'. Below this, there is a section for 'Abilities, knowledge and'.

**Improve performance and engagement with regular check ins**

[Find out how](#)



# 2.4. MANAGING PERFORMANCE IN THE FLOW OF WORK

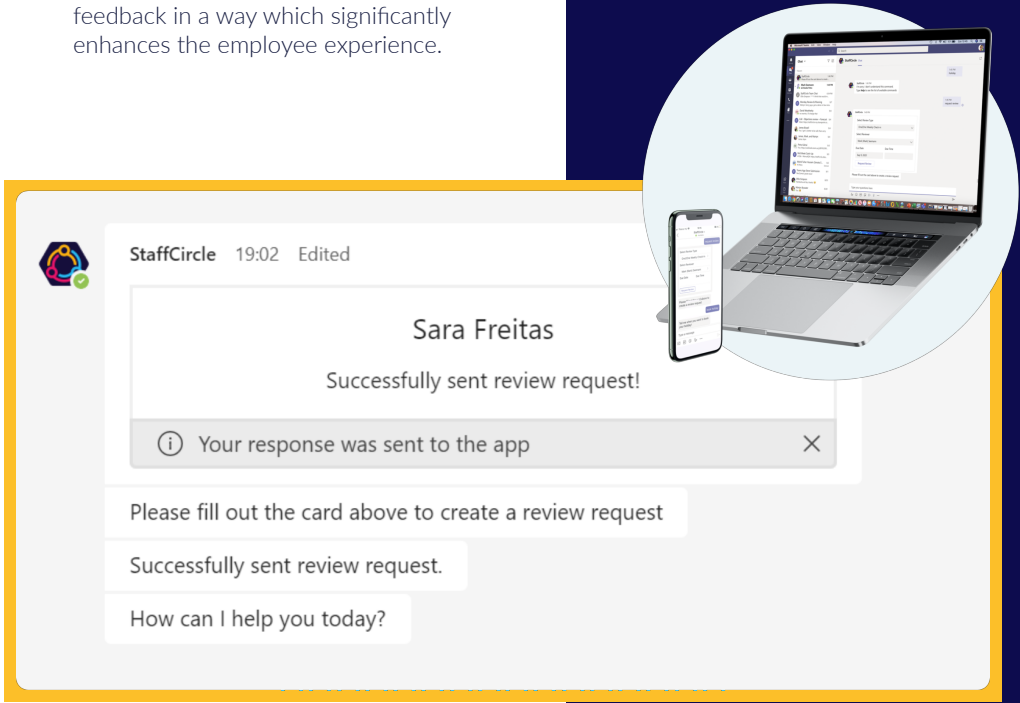
High-performing organizations are able to generate better results from their approach to performance management compared

to their low-performing counterparts in a number of key aspects which manage performance in the flow of work:

LOW PERFORMING ORGANISATIONS	HIGH PERFORMING ORGANISATIONS
Over-emphasize ratings and reviews	Balance ratings and reviews with purpose and mindset
Use command and control culture	Foster a culture of trust and transparency
Fixed outlook mindset	Growth outlook mindset
Individual and competitive orientation	Team collaboration orientation
Rewards volume	Rewards value
Inconsistent and infrequent feedback	Effective feedback and in-the-flow development
Individuals responsible for development	Peer development with learning networks
Results-centred leadership	Human-centred leadership
Traditional email and paper-based comms	Embrace technology, AI and data analytics

Source: [Deloitte](#)

In an era of social media in which everyone is used to instantaneous feedback via easy to use apps, the right performance management tools will allow businesses to adapt to this flow of work model of human-centred continuous feedback in a way which significantly enhances the employee experience.



Watch how it works →

Accelerate adoption by making the process of check-ins super easy for your team directly from the familiar interface of Teams, without needing to go online or open a browser





Source: [ONS](#)

## 2.5. A NEW ERA OF HYBRID WORK

**Just as the pandemic has accelerated the shift away from annual reviews towards continuous feedback, so too has the increase in hybrid and remote working accelerated.**

84% of UK workers who had to work from home because of the coronavirus pandemic plan to embrace a hybrid working model in 2022 and beyond. 78% of those who worked from home in some capacity said that hybrid working gave them an improved work life balance.

This leads companies into a new era of hybrid workplace modeling, which offers the best balance of both worlds.

One of the key challenges of this new model is ensuring that employees are well connected with one another regardless of their physical location, and facilitating the right tools and processes will be necessary to maintain uninterrupted workflow between employees working on-site and those who continue to work from home.



**Add Review**

Please select people you would like to assign 'Monthly Review' to

Person: [Dropdown]

Reviewers:

- Sarah Reed
- Amanda Taylor
- John Greeny

**Schedule New Review**

Select Review Type: [Dropdown]

Select Reviewer: [Dropdown] James Smith

Due Date: [Dropdown] Time: [Dropdown]

[Schedule Review](#)

**Make the review process consistent and effortless**

[Find out how](#)

### 3. BIGGEST BARRIERS TO THE SUCCESSFUL IMPLEMENTATION OF PERFORMANCE MANAGEMENT

Successful implementation of an effective performance management strategy is as much about avoiding common pitfalls as it is about putting the right processes in place – sometimes, what works well for one business is detrimental to the success of another.

Some of the common barriers to successful implementation of performance management are:



#### Attempting to serve too many functions

Performance management can be broken down into a wide variety of constituent components, so make sure the correct measures are being used to achieve the desired outcomes.



#### Processes are too time-consuming and burdensome

The point of performance management is to streamline processes to allow for better time and energy management, not create unnecessary tasks which eat up the working day.



#### Over-emphasizing rules and processes

While everyone likes to know they are playing by the same rules, don't allow these to inhibit creative thinking and innovation, as well as the fostering of healthy collaborative relationships.



#### Employees lack faith in the outcomes

It's common for employees to believe that managers sometimes play favourites, so processes should be mindful that fairness and transparency sits at the core.



#### Implementation is half-hearted

When introducing new processes to your performance management systems, ensure they are implemented consistently. Requirements of employees and managers must be communicated.

## 4. HOW TO WIN AT PERFORMANCE MANAGEMENT

Understanding the right questions to ask before embarking on a performance management program is equally as important as knowing which pitfalls to be mindful of. Transforming performance management in a way which works for your business means starting off on the right foot.

Deloitte's series on transforming performance management recommends 5 basic questions you should ask yourself:

1

**What is the purpose of performance management at our organization?**

Focus on proactive strategies which engage employees across the workforce, rather than addressing issues only affecting a small proportion of employees.

2

**What outcomes do we want to drive?**

Create a strategy which seeks to develop the skills of your employees while rewarding the right behaviours to promote more of the same.

3

**What unique cultural elements need to be considered when changing performance management at our organization?**

Define what makes your company unique and reflect this through culture so the right talent is attracted to your organization.

4

**What experience do we want employees to have and what do we want them to say about performance management at our organization?**

Identify the mechanisms which drive engagement and motivation – then double down on them.

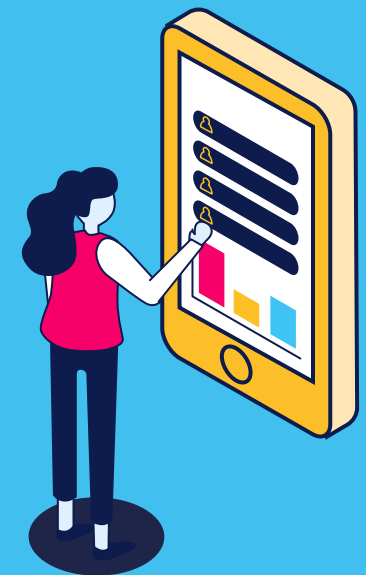
5

**What data do we want performance management to provide for leaders, managers, and employees that it is not providing today?**

Decide what metrics matter the most for gauging performance outcomes, then implement the technology to collate and analyse this information.

Answering these questions will ensure that a performance management strategy is crafted to tailor the requirements of your business and focusing time and energy where it matters the most.

Effective performance management isn't just about reducing the amount of effort required to implement it; it's about increasing the utility of these processes to maximize the end results.



StaffCircle's performance management platform improves employee engagement levels by 74%

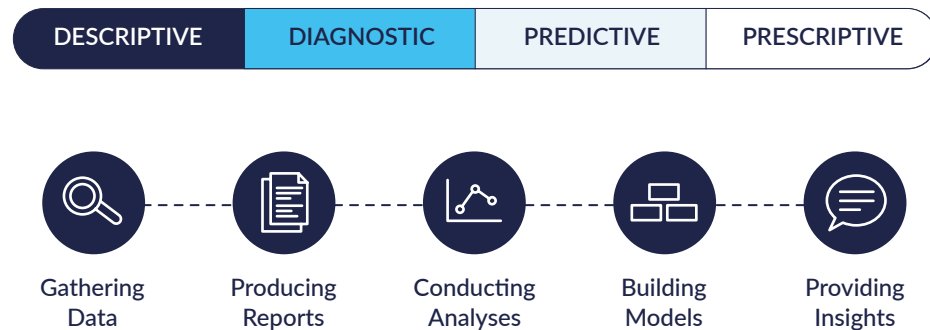
**Watch how it works →**

## Making the most of people analytics

Whenever possible, performance management decisions should be driven by clear data. But often the amount of data available can be overwhelming, so this needs to be accompanied by analytics and reporting processes which make this data meaningful.

Integrating data streams into the performance management workflow leverages it in a way which maximizes worker productivity. This allows

managers and leaders to produce reports in real-time which help them better understand the dynamics which matter the most, then using this data to build models which will boost the behaviours necessary for optimal outcomes.



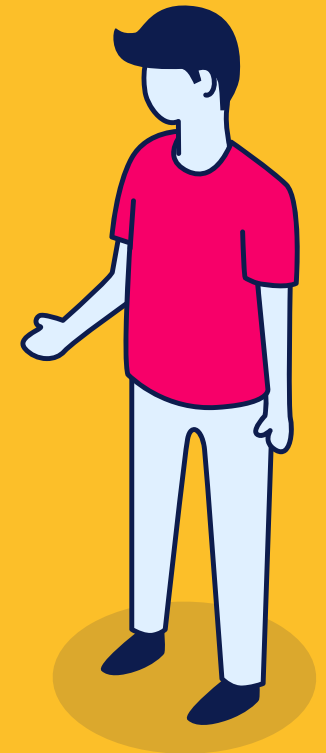
Source: [Deloitte](#)

## 5. PRACTICAL GUIDANCE

Before you read on, the most important questions to ask when tackling the performance management beast are:

Why are we doing this?  
and  
What is the outcome we're trying to achieve?

The answers to these should drive everything you do.



## 5.1. PERFORMANCE MANAGEMENT CHECKLIST

In this section we have pulled together a checklist for planning, executing, and evaluating your performance conversations.

You can use these pointers face to face or for digital performance management.

### PREPARATION:



#### The environment:

Consider whether the discussion will take place virtually or face to face. If it is virtually, make sure that you have a platform to connect with your team member. Whenever possible try to minimise interruptions.



#### Timing:

The frequency of your performance check-ins can determine how current your information is. Whereas 'once a year' appraisals look back on someone's past performance and as such tend to be descriptive and diagnostic, regular check-ins are more predictive and provide real-time information if any issues need to be tackled before they become problems.

### What's the objective and what should we measure?

#### Defining or re-visiting performance goals:

Oftentimes these are based on competency frameworks and job descriptions. If you haven't yet done this, think about linking individual objectives to departmental then overall company objectives. Enabling the employee to see how their work feeds back into the bigger picture creates transparency and purpose.

#### Determine the type of review:

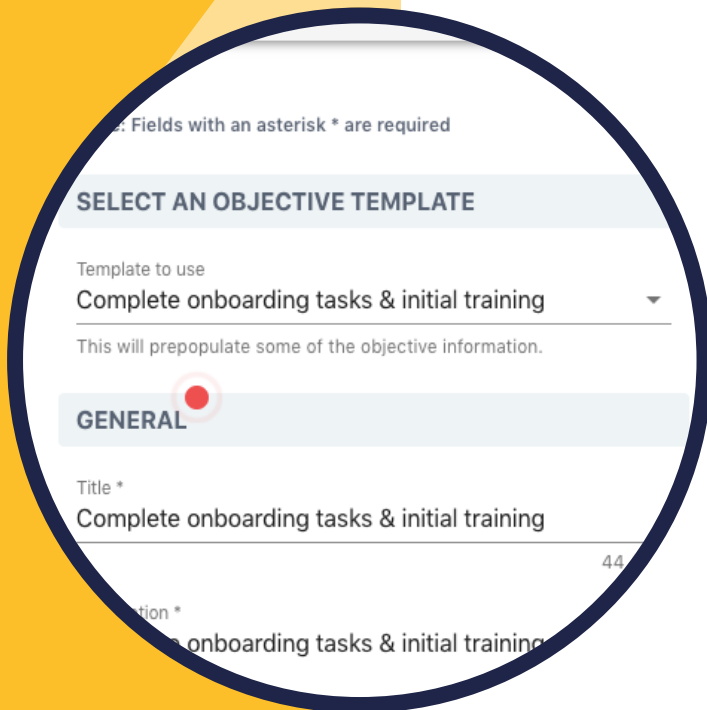
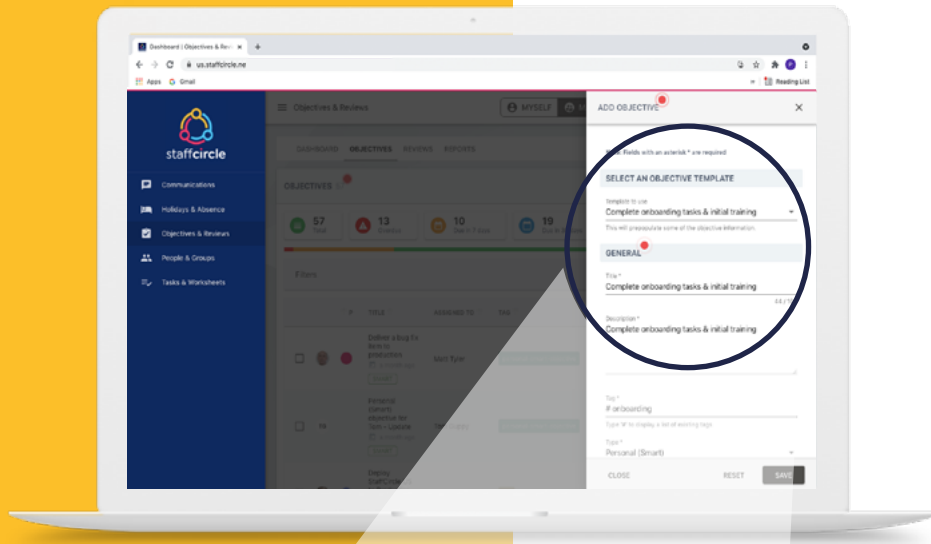
Is it just going to be between the manager and employee? Or will you include self-assessment and peer review as well? The more sources provide feedback the more accurate the assessment will be. A performance management system where employees can provide continuous feedback to each other (comments, awards and rewards) can help avoiding recency bias which is a cognitive bias that favours recent events over historic ones (basically we forget things).



#### TOP TIP

From leading HR analyst for Deloitte, Josh Bersin:\*

Having competency models around jobs is a brittle approach because every time we change the job title we architecturally need to change the skills and competencies associated with it. Rather than job competencies, think about repeatable business capabilities that one would need in order to be good in a role. Define these business capabilities and link these to job roles instead.



### Be transparent:

Make sure that you set clear expectations, outline what will be covered and communicate if the employee needs to prepare anything in advance. This can prevent anxiety or worry.



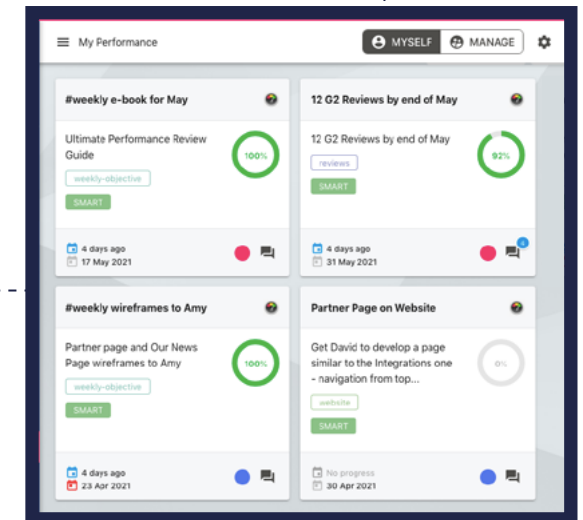
### Keep a record:

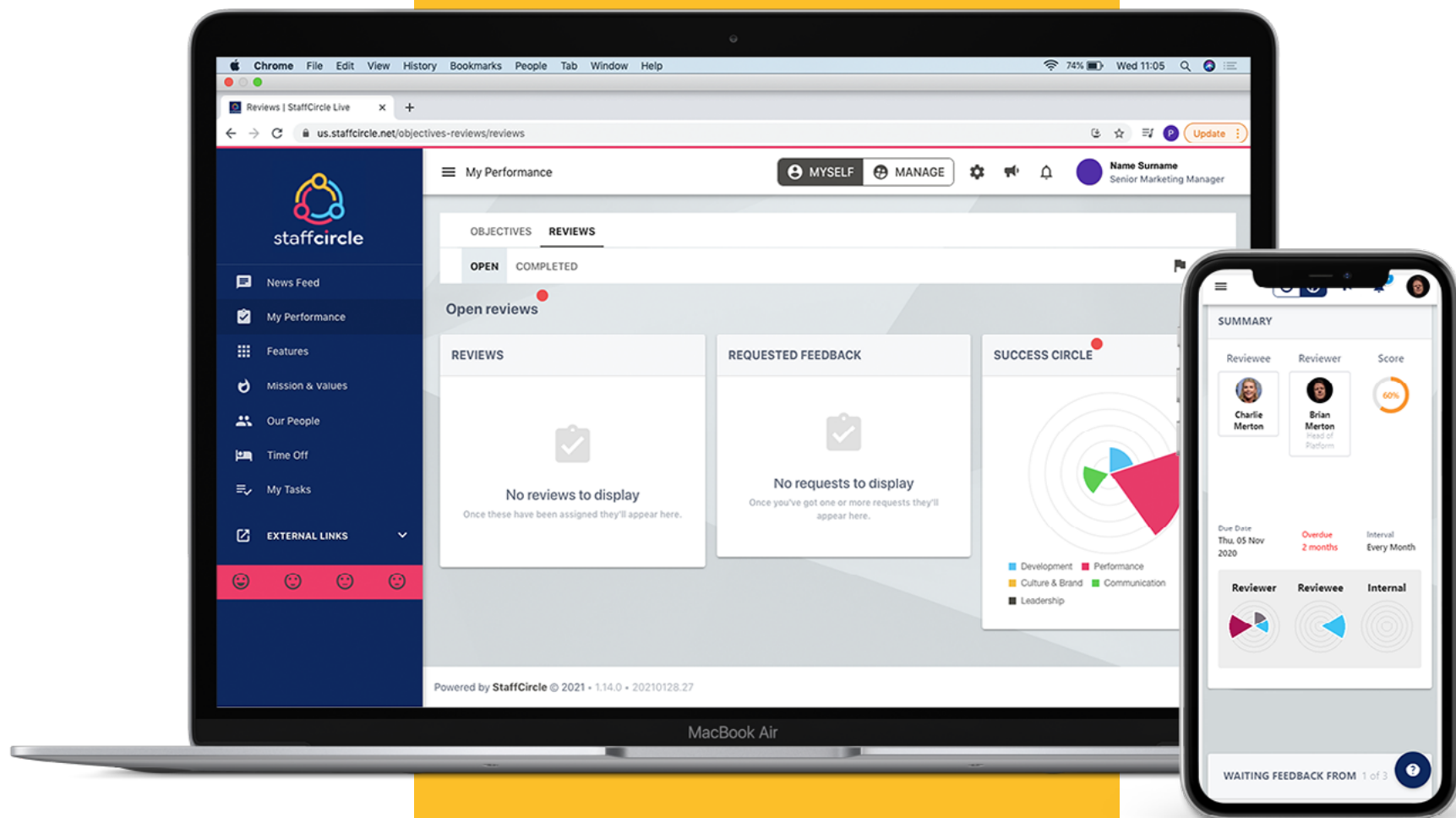
Doing this will help with measuring and documenting progress. Having a pre-set template either on paper or digitally can help with consistency. A digital system will turn these records into real-time information which will be at your fingertips whenever you need it. Similarly, the employee will also have transparency.



### Collate data:

Depending on your approach to performance management (e.g. paper based or you need to request information from other sources) collate background information on progress and feedback from co-workers. You can digitise this whole process by utilising a performance management platform, which should allow you to get all of this in seconds, many offering visual representation on employee performance and behaviour in a form of a chart or graph.







## DURING THE REVIEW:



### **Lead with positivity:**

The sole purpose of sharing feedback is to get the employee on the right track. Therefore, it is essential to choose 'positive set of words' that sound motivating. You could start with talking about the valuable contributions of the employee. However, this doesn't mean that performance issues shouldn't be addressed. (See next chapter on giving effective feedback)



### **Take a human approach:**

There might be underlying circumstances that lead to a behaviour or performance. By being personable you can uncover these and have a positive impact. Most leaders and HR professionals face the conundrum of engagement with low performing employees most likely to be unengaged. However, these types of underlying social behaviours can be changed by taking a human approach to performance management.



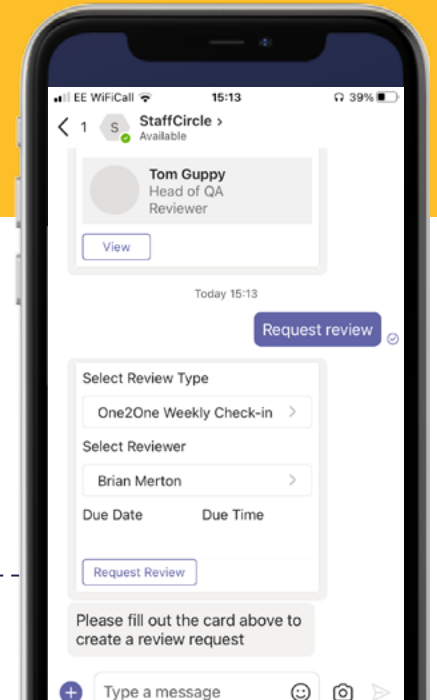
### **Give your undivided attention:**

This means finding a space and time free from distractions. Have you ever talked to someone whilst they were distracted by e-mails, messages or other people? When that happens, the message is that 'other things are more important'. By focusing on your employee, you will send a clear message that you value them and their time.



### **Schedule the next review:**

Regular discussions facilitate better assessment of skills and capabilities, resulting in more focused performance objectives.



## AFTERWARDS:



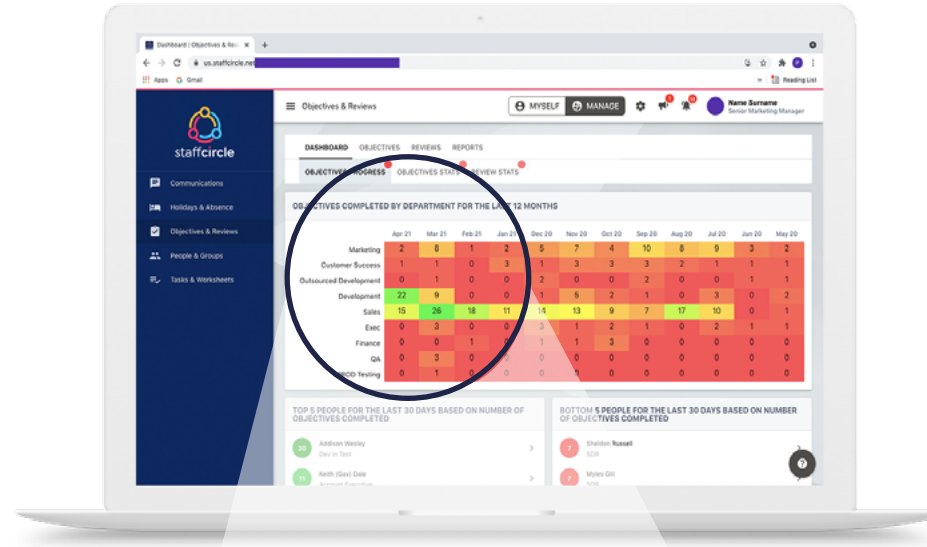
### Share your notes:

If you do this digitally, you can automate the process which can save a lot of time.



### Track agreed goals:

Regularly review goal progress to see what's going well or where employees need help. If you have real-time information, you can recognise or re-evaluate and create a plan for improvement or tap into their areas of strengths.



### Obtain feedback:

Reviews should be a two-way process, where employees have a voice. Therefore, it is good practice to allow them to summarise their takeaways from the meeting and feed-back their thoughts on what was discussed.



**SUPPORTING INFORMATION**

SUMMARY CONTENT

CONVERSATION

Add your comment...

No comments

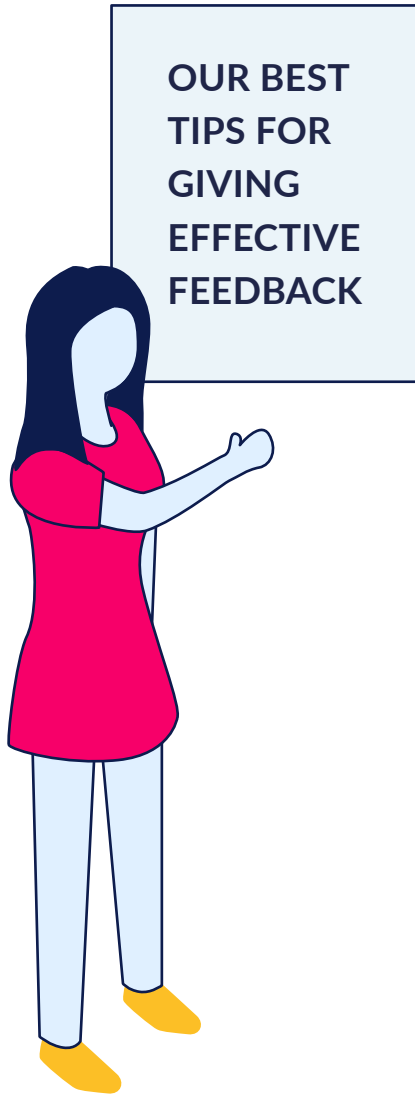
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DOCUMENTS

No documents to display

Once files have been uploaded, they'll appear here.

## 5.2. GIVING EFFECTIVE FEEDBACK



### OUR BEST TIPS FOR GIVING EFFECTIVE FEEDBACK

#### Don't tell them what to do. Instead...

- Talk about what you would do in a similar situation
- Talk about your own past experiences. Ask them about their own
- Get them to self assess

For example: 'When xyz happened, I did... and the outcome was...'

#### Make it meaningful.

Research shows that people learn better from what went well. Walk them through in detail, when something goes well

For example: 'I wanted to tell you that I was really impressed with the way you handled that call. I could tell, that you covered every angle to make the customer happy. I appreciate the extra time and energy you spent on this.'

#### Use 'I' messages.

No we don't mean your iPhone... Rather: shifting the focus from 'You' to 'Me'. Instead of attaching a label focus on what it means.

For example: 'This is not very strategic thinking' Instead: 'I'm not clear on what you mean.'

#### Be factual not interpretive

Humans are biased. We all interpret the world through our own lenses. As such, it is important that there is a quantifiable, measurable part to feedback as well.

For example: target numbers and skills-gap analysis.

#### Be clear on objectives

Without goals, there is no progression towards anything. There is nothing to give feedback on if the objectives are not clearly defined or there are none.

Make sure you don't keep moving the goal posts as it will make giving effective feedback a lot more difficult.

#### Create a learning environment

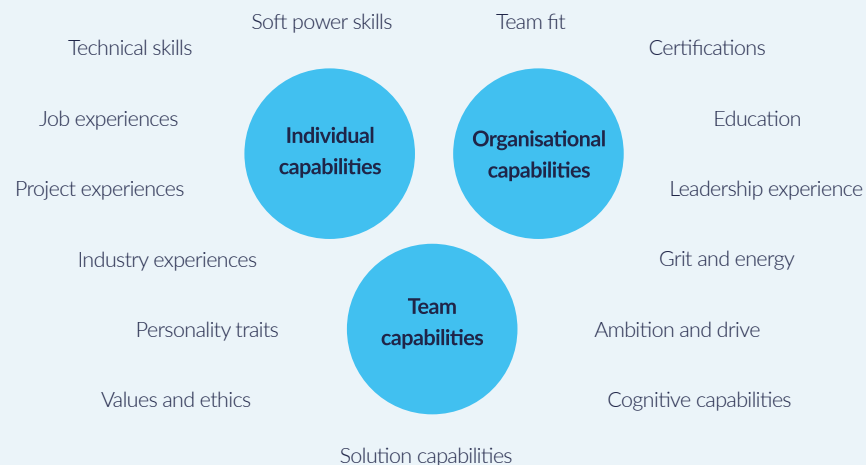
Criticism and labelling are likely to result in a judgemental and demotivated work environment.

Instead: Recognise behaviours that align with your organisational success, create an internal organisational channel dedicated to learning

## 5.3. 25 SMART PERFORMANCE REVIEW QUESTIONS THAT WORK

### What kind of questions should we ask?

This will depend on your performance objectives and industry but it could worth thinking about questions in relation to capabilities.



Source: Josh Bersin, The Many Facets of Capabilities

Linking to these capabilities we have collated 25 questions that can get you started or give you inspiration. To keep the review concise we recommend to pick and choose those that resonate the most. We grouped the questions under the following headlines:

### 25 Questions

#### INDIVIDUAL AND ORGANISATIONAL GOAL ALIGNMENT:

- 1. What are the key success drivers in the company?**  
This will give you a good idea on whether your employees know the success drivers in your company.
- 2. Which of our organisational goals do you feel is more aligned with personal goals?**  
This can indicate how connected the employee is to the organisation
- 3. What changes would you make in the company if you were able to?**  
This question can give insight into the day-to-day lives of employees and identify things they love about the company or aspects that they don't agree with.

#### OVERALL PERFORMANCE:

- 4. What are the things you are most proud of accomplishing during this month/quarter/year?**
- 5. What were your biggest goals for this month/quarter/year? ?**  
Again, this question will highlight how much the employee can link their own goals to the organisational ones.
- 6. Out of these, which ones did you manage to achieve?**
- 7. What challenges do you foresee for those you haven't achieved yet?**  
This question can pinpoint any obstacle or additional skill or training requirements.
- 8. What motivates you to get your job done?**  
Intrinsic motivators (doing work you love, serving others, innovating, creating) are far more powerful than simply getting a pay reward or progression.

## 25 Questions

### EMPLOYEE STRENGTHS:

- **9. Are there any skills that you use outside of work and wish you could also use for your role as well?**  
A recent study by Deloitte (Human Capital Trends 2021) highlighted the importance of "empowering workers with agency and choice over what work they do, unleashing their potential by allowing them to apply their interests and passions to organizational needs". Unleashing employee potential is what differentiate
- **10. What do you feel most proud of achieving since your last review?**
- **11. Which aspect of your job do you look forward to the most on a regular basis?**
- **12. What did you do that delivered the most results this month/quarter/year?**

### AREAS FOR IMPROVEMENT:

- **13. What has been your most challenging part of the job so far?**  
This is instead of asking "what are your weaknesses?" This is a more positive approach.
- **14. What skills have you got that you believe you could use more effectively?**
- **15. Which aspects of your job do you least enjoy and why?**

## 25 Questions

### JOB RELATED:

- **16. Is there a part of your job you would do differently?**  
Sometimes employees have solutions but no forum to raise them. This review question gives them a chance to share.
- **17. What can be done to make your role more enjoyable?**  
Feedback on this can highlight how the individual feels about potential remote working, the tools and equipment provided to carry out their job, variety of tasks or the role itself.
- **18. What makes you the most productive?**
- **19. Under what type of conditions do you do your best work?**
- **20. What do you enjoy most about your job?**

### PROGRESSION:

- **21. If you could do anything within our company, what would it be?**  
This question will give you insight into your employee's career and personal aspirations.
- **22. Where would you like to progress?**
- **23. If you had to prioritise what is the most important to you, out of these categories, which one would you choose? Recognition, additional responsibility, the opportunity to lead or networking?**

### TEAM FIT:

- **24. What is it like to work within your team/department?**  
By asking this question you can uncover information on team dynamics or if there are any tensions.
- **25. What do you think to the level opportunity provided to connect with your team and/or manager?**

## 5.4. FIVE STEPS FOR DEALING WITH LOW PERFORMANCE

Your company will have set rules for officially tackling underperformance in a form or a policy or procedure. So, in this part we focus on turning around problematic behaviours by taking a coaching approach. Our suggestions are loosely based on recommendations by the Harvard Business Review.

1

### Acknowledge the problem:

The key to change and achieving a positive outcome is acknowledging that there is a problem. You also have to ensure that someone is managing the process. Too often, underperformance gets ignored or the responsibility gets transferred.

2

### Get to the bottom of it:

There could be a variety of reasons why someone's performance is falling behind. These could include, lack of skills, lack of clarity around expected outcomes, poor person-job fit, poor cultural fit, personal differences between manager/team members, mental health issues or other personal

3

### Agree a plan:

Here, it is important that the underperformer acknowledges that there is a problem. Without this, success is unlikely. Based on two-way discussions with the underperformer, agree a plan where both parties commit to specific targets and actions. Ask them open ended questions and get them to come up with solutions. You can use the Effective Feedback Guide in this book to help you with this. Or use the 20 Coaching questions overleaf, based on the most common coaching framework the GROW model (Goal, Current Reality, Options, Will or Way Forward) focusing on Options and Way Forward.

circumstances – just to mention a few. Getting feedback from a variety of sources (including the underperformer's own view) could be useful and give an objective outline. Sometimes data can pinpoint the exact cause e.g. performance started changing when there was management change. Regardless, identifying the cause of the issue will help remedy it. However, it is important that this is done in an impartial and confidential manner.

OPTIONS	WILL OR WAY FORWARD
1. What are your options?	1. How are going to go about it?
2. What do you think you need to do next?	2. What do you think you need to do right now?
3. What could be your first step?	3. Tell me how you're going to do that.
4. What do you think you need to do to get a better result (or closer to your goal)?	4. How will you know when you have done it?
5. What else could you do?	5. Is there anything else you can do?
6. Who else might be able to help?	6. On a scale of 1 to 10, what is the likelihood of your plan succeeding?
7. What would happen if you did nothing?	7. What would it take to make it a 10?
8. What has worked for you already? How could you do more of that?	8. What obstacles are getting in the way of success?
9. What would happen if you did that?	9. What roadblocks do you expect or require planning?
10. What is the hardest/most challenging part of that for you?	10. What resources can help you?
11. What advice would you give to a friend about that?	11. Is there anything missing?
12. What would you gain/lose by doing/saying that?	12. What will one small step you take now?
13. If someone did/said that to you what do you think would happen?	13. When are you going to start?
14. What's the best/worst thing about that option?	14. How will you know you have been successful?
15. Which option do you feel ready to act on?	15. What support do you need to get that done?
16. How have you tackled this/a similar situation before?	16. What will happen (or, what is the cost) of you NOT doing this?
17. What could you do differently?	17. What do you need from me/others to help you achieve this?
18. Who do you know who has encountered a similar situation?	18. What are three actions you can take that would make sense this week?

Provide an opportunity for feedback on any additional resources required (e.g. better equipment to do the job) It is important that the actions agreed are

specific and measurable so that after a set time frame progress is easy to monitor. For example:

**"Be better with sales performance" is neither specific nor measurable.**

**Instead...**

**"Make 100 sales calls every week until Day.Month.Year" is measurable.**

**It's worth breaking down the outcome into actions. (What specific actions would create the desired outcome)**

**4**

#### **Review progress regularly:**

This is where many organisations fall short. Continuous evaluation is key to getting better and assessing either positive changes or no movement. Refer back to the time-scales agreed within the original plan and keep to them. A HR software can help automate this process and provide you with real-time information on progression, including feedback from co-workers.

**5**

#### **Take action:**

If there is a positive change praise the results and behaviour, however if there's no change make the consequences clear. This can be triggering a formal procedure including capability or disciplinary.

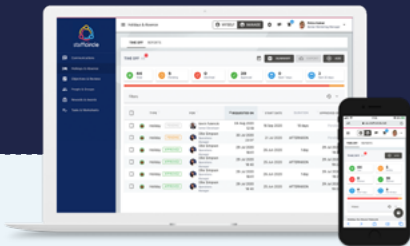




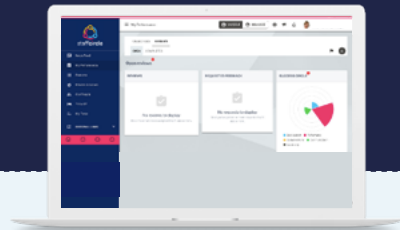
## 6. CONCLUSION

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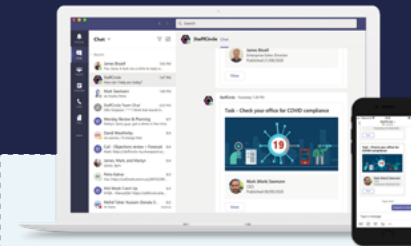
There is a shift from traditional once-a-year appraisals towards regular feedback and check-ins. Whilst appraisals are good diagnostic tools, in today's disrupted world they enable a reflective rather than a future-facing predictive approach. Regular check-ins and real-time data allow you to pinpoint shortfalls, change direction pivot and quickly course correct. Conversely, once a year discussions are slow and clunky. Similarly, digital solutions and software can provide easy to access data that informs strategic decisions whilst paper-based approaches are time consuming and slow. Identifying what matters the most and gearing data around this can make the difference between performance reviews that work and those that don't.



Holidays and Absence



Success Circles Competency Framework



Microsoft Teams Integration



Objectives Heat Map

Talk to us about how you could future proof your performance management, employee engagement and communications, even from within Microsoft Teams without having to suddenly change your existing system.

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