



PERFORMANCE MANAGEMENT SOLUTIONS FOR HYBRID WORKING

A Buyer's Guide

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INTRODUCTION

If you are reading this, it is likely that you have some questions about the different types of performance management solutions available. It can be an overwhelming minefield, so we're here to help you find the perfect solution.

In this guide, we'll take you through the trends, the options and what to look out for. We'll equip you with the practical resources that will help you build your business case and provide you with knowledge you can use when it comes to performance management systems.

We also understand that it can be a long journey and that downloading this guide might just be an initial exploration. The main goal here is to provide you with a framework that supports you to find the best solution and partner for you.

Whilst we like to think our product is pretty awesome, we've put our objective hat on, ensuring that we give you an unbiased overview.



1 GETTING STARTED

1.1. What's happening in the market?

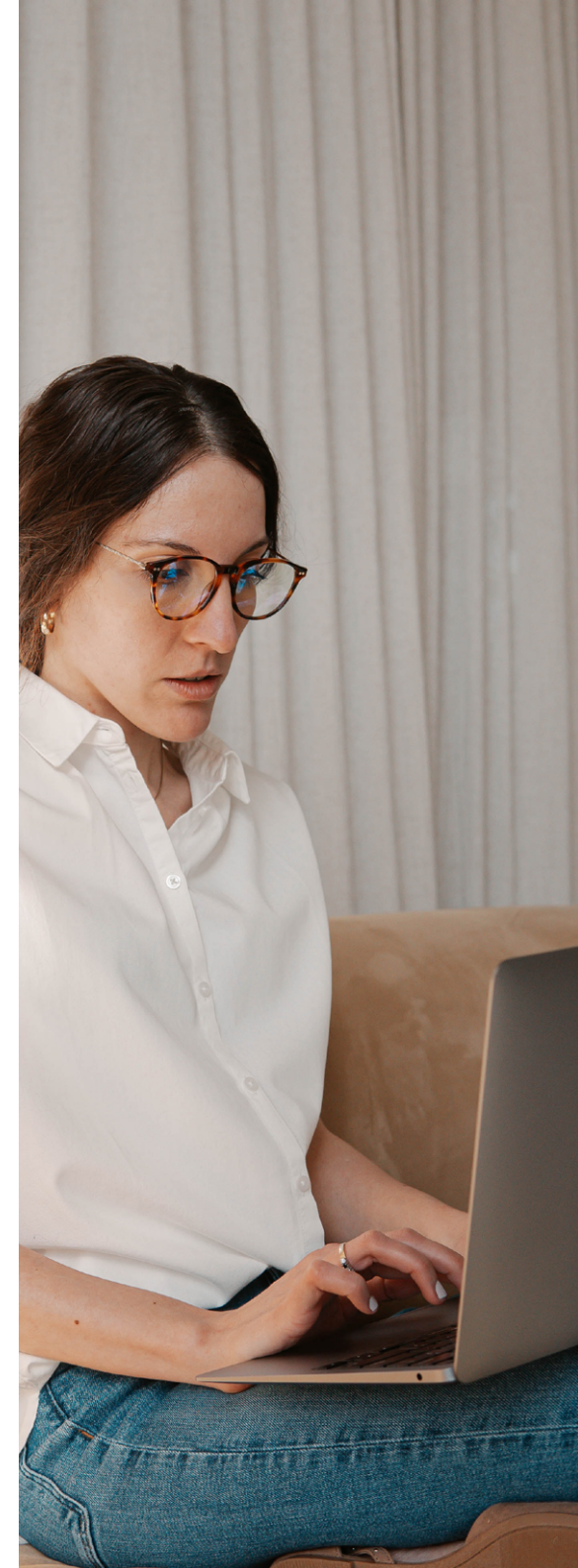
The trends in Human Capital Management and the facts

There are a number of key trends that we currently see emerging when it comes to Human Capital Management (which extends to Performance Management as well). Today, most organizations have many types of workers working from different locations. Whilst working 9-5 in the office, with limited flexibility, used to be the norm, the past few years have proved that (most) employees can work from anywhere, at any time.

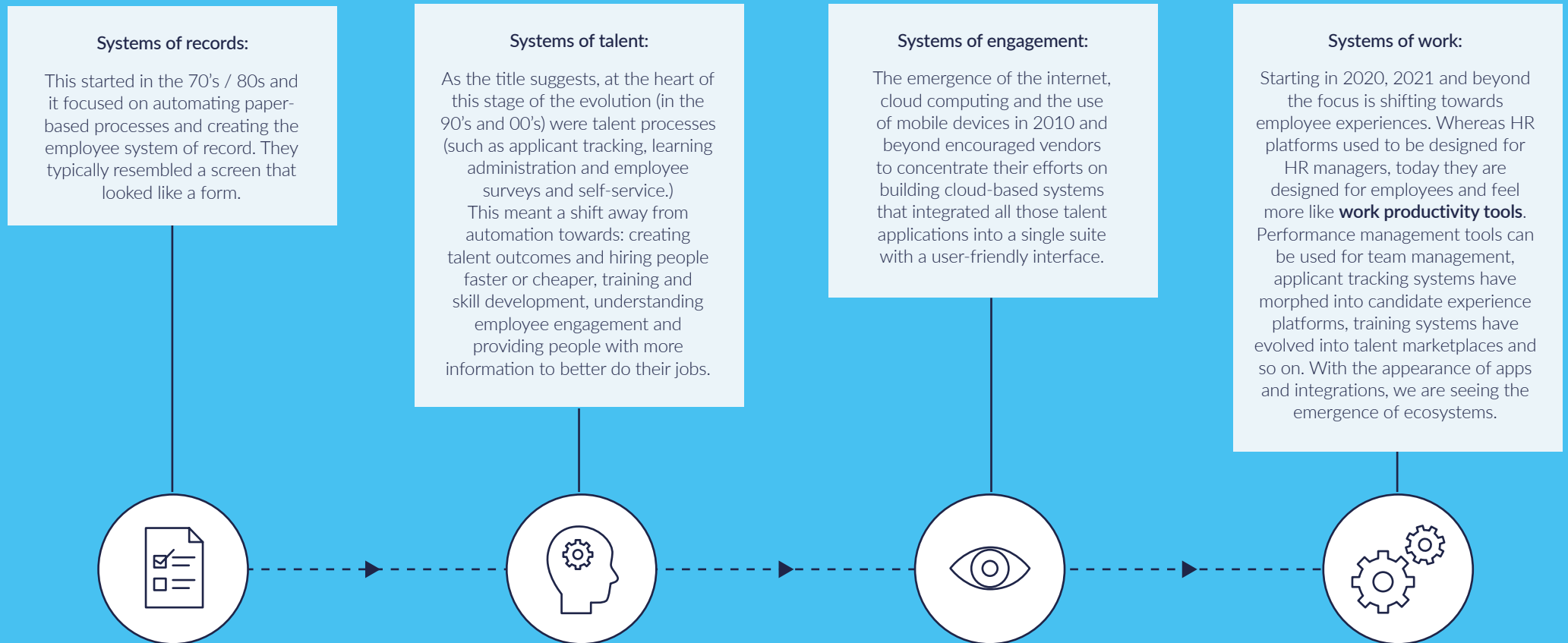
Unsurprisingly, this has changed expectations and mindsets towards a flexible working model. As such, the hybrid working model has increasingly been adopted.

But the increase in working digitally can result in an 'Always On' mentality, with work-life balance taking a back seat and employees undergoing more stress. It is no surprise that all of this is having an impact on the output per hours worked, with productivity slowing down.

Consequently, the focus in Human Capital Management has shifted to systems that make an employee's work-life easier. This has led to moving away from 'systems of records' to 'systems of design'. In other words, **HR software used to be designed for HR managers, today it is designed for employees.**



In his annual HR Tech Market report leading industry analyst Josh Bersin highlights the following key stages when it comes to the changes in the use of workforce related technology:



1.2. Where does performance management sit?

As mentioned earlier, with the changes to the way we work there's now a huge emphasis on employee-centric people management initiatives.

So, systems which are designed for employees, essentially aim to create better employee experiences. There is a direct correlation between external customer satisfaction and how an employee feels about working at a company, therefore employee experiences influence overall company performance.

Research by [Gallup](#) revealed that companies that have higher employee engagement encounter:



When we consider what contributes to someone's experience as an employee, usually we only think of onboarding and perhaps team activities. But talent experience is a lot more than that. It pans across a number of elements of the talent lifecycle.

Performance management sits within this cycle and plays a key part in someone's career progression, sense of success and their desire to stay with a company or within a role.



**TALENT MANAGEMENT -
A PROCESS:**



There is a lot more research on the topic and we have only just scratched the surface. Because every business is unique, it could be useful to collate a list of key facts that can support your own situation.

1.3 Resources for building your Business Case

Here, we have collated a list of resources from the most widely trusted industry leaders for you to help determine what good looks like.

HR Technology 2021: The Definitive Guide by Josh Bersin:

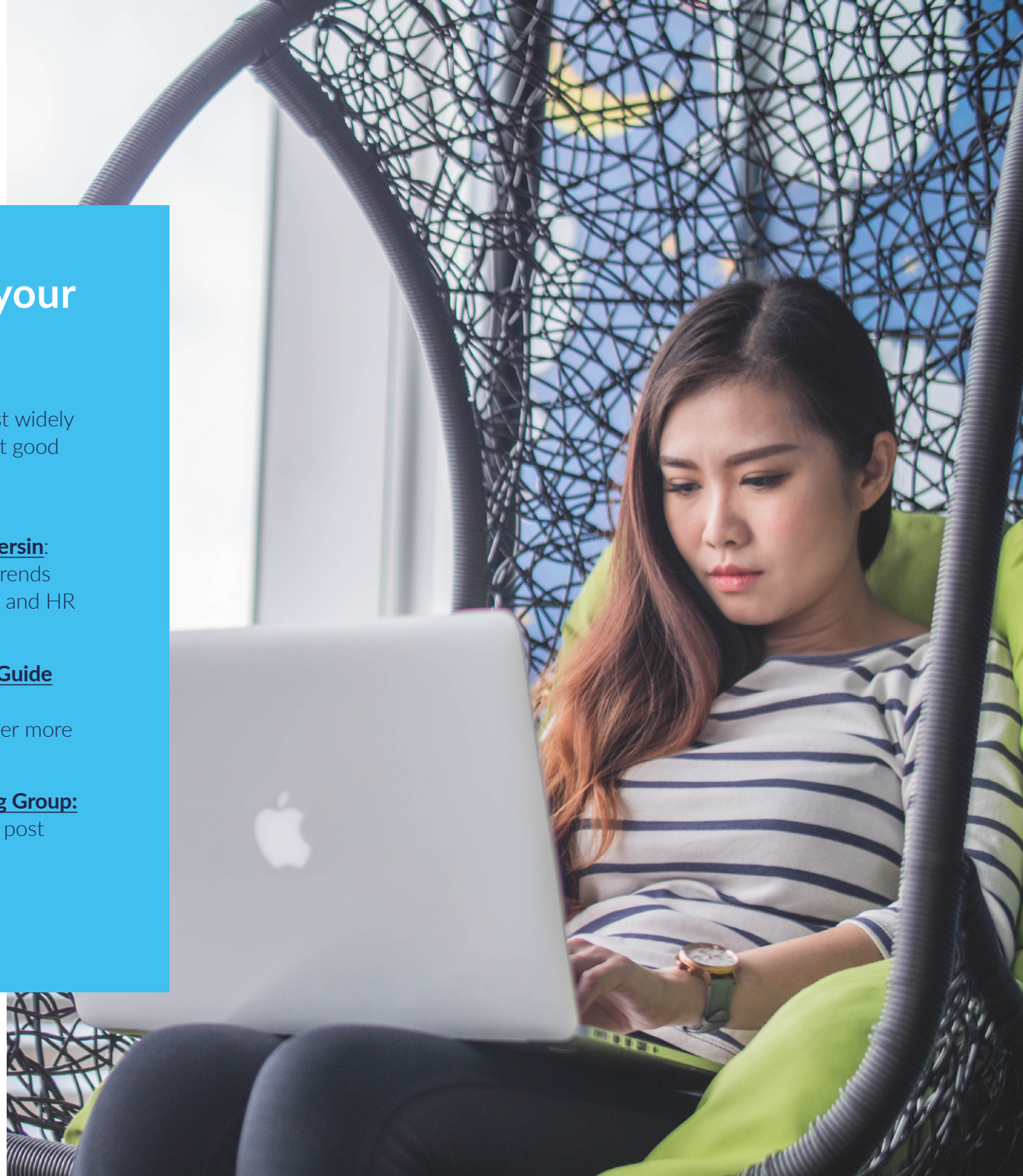
This guide provides detailed information on the latest trends and approaches when it comes to people management and HR Technology.

The Secrets to Employee Experience: The Definitive Guide by Josh Bersin:

This guide delves into why Employee Experiences matter more than ever before and provides a framework for action.

The How to of Hybrid Work by the Boston Consulting Group:

This article talks you through a systematic approach to post pandemic hybrid ways of working.



1.4. Situation Analysis – Where are you now?

Perhaps you already have a HR system that incorporates performance management and are looking to replace/update it.

You may use Word documents combined with Excel and be looking for a way to streamline your back office.

You might have a system that works well and just want to add an extra module.

The possibilities are wide ranging. Regardless of your circumstances, we have to start somewhere.



COLLECT BACKGROUND INFO

The resources listed in section 1.3 will give you a good general idea of where you are at in comparison to the latest trends. However, this is only one side of the coin.



DETERMINE WHAT YOUR TEAM NEEDS - IDENTIFY YOUR CHALLENGES

This is a crucial step. If your team doesn't buy into the new system, they won't use it. If they don't use it there will be no data to analyse or report on.

If you already have a system in place, talk to your employees, managers, HR department – everyone involved who uses it. Is there a pattern to complaints? Do employees agree on features they'd like to see? What do they like about the existing platform? What works? This will also be useful to identify what type of software you need.

EXAMPLE QUESTIONS

- Does the current system/approach meet your needs? Yes/No
- What could be improved? (Provide details)
- What works well in the current approach to performance management?
- What are your current biggest challenges with performance management? (E.g. time consuming / not user friendly / can't easily find information)
- Is there anything that could be useful for the future?
- On average how much of your time do performance management related tasks take up?
- Do you think that the current approach to performance management has a positive impact or improves output?
- Can you easily report on (if non managerial: see your own) performance results?

1.5. The most common challenges we hear about

- **Lack of visibility** and reporting capabilities (information is saved on individual hard drives or in separate documents which results in having to chase information or it becomes problematic to process)
- **No real-time data** means difficulty in course correcting and solving problems before they take root. Performance management initiatives becomes prescriptive and diagnostic in nature rather than something that provides real insights
- **Lack of consistency** in manager approach to performance management (frequency, questions, communication etc)
- Managers wanting a solution that **'talks them through' performance reviews**
- Employees wanting visibility and **transparency of their progress**
- **Bias** (intended or unintended) when conducting performance reviews or appraisals



2

**OPTIONS: THE GOOD, THE BAD
AND THE UGLY**

Organizations today have the option to go with a single suite of products or to choose point solutions or modules and work to integrate them in order to share data across platforms.

But one thing is certain: you need a platform that is not only easy to use, but actually easy to build and customize.

2.1. Point solutions

Point solutions tend to have a singular focus and therefore aim to solve one main issue. If your HR department has specific challenges that need to be addressed, point solutions can provide the answer. Because of their focused nature they can often solve your problem with excellent features and user experience.

Point solutions can lead to a wide use of different systems that individually do a great job in their particular area, but are not capable of integrating with each other. As such, you may end up having to enter the same data multiple times or learn to use a variety of different systems.

2.2. Modules

Modules are similar in nature to point solutions. However, the difference is that they tend to be an individually functional element of a Human Capital Management (HCM) platform or Human Resource Information System (HRIS). So, you can buy a robust part of a single system, which gives you flexibility for the future to purchase other modules and end up with one single source of truth.

Most organizations have a HR information system (HRIS) in place already, and almost all HRIS have an appraisal or performance management module that can be 'bolted on' at some (mostly low) additional cost.

(For example, StaffCircle has 3 modules Performance Management, HR Operations and Comms & Culture and you can decide to add the Comms & Culture or Performance Management Module to your existing HR software.)

2.3. Suite Solutions

Suite solutions are best explained as a 'one-stop-shop' that helps businesses streamline and organize the tasks associated with the employee life cycle. This is done by encompassing all the moving parts of HR. Suite solutions comprise of various modules which often include HR Administration, Recruitment, Payroll, Succession Planning, Org Charts, Comms tools, Performance Management etc.

Most suite solutions only require data to be entered once, which can then be used in a variety of ways across the system, due to its integration with HR processes. It is also customizable, allowing companies to tailor features to the way the business is run.

Of course, it is impossible for one software to cover everything, but if you choose a platform with a robust integration marketplace, you won't be missing anything *(for example adding a learning software to your HR software in a way that still feels like one unified system).*

2.4. EX Platform

Think of Employee Experience (EX) platforms as the next generation of HR tools - An HCM or HRIS solution that has deep integrations with other software that enable a seamless end user experience.

Market leader Josh Bersin defines it as [the] "platform that lets a company design this multi-step, multi-flow experience, integrate it with all the various IT and HR applications needed, and abstract the user from the complexity behind the scenes." *(for example StaffCircle is a suite solution with ever developing EX capabilities.)*

Aspects like communications and online communities, regular check-ins, discussions and transparent and continuous performance management (as opposed to once-a-year appraisals) become critical influences of an employees' overall experience with a business.

3 COMPARISON & PRICING

3.1 Comparing the different solutions

	POINT SOLUTIONS	MODULES	SUITE SOLUTIONS	EMPLOYEE EXPERIENCE PLATFORM
Best Use	Your overall system works well but you need to solve a niche or specific problem	You need a 'one-stop-shop' system to cover all areas of the employee lifecycle (either because you are starting from scratch or your current solution doesn't meet your needs)	You have a HR Information System in place and are looking to 'bolt-on' an additional performance / appraisal module rather than buying an entire new software solution	The next generation of employee portal. You want a solution that combines engagement, wellbeing, productivity, collaboration, and communication tools that's accessible, unified, and easy to use
Advantages	<p>Deep functionality for one specific area</p> <p>Maintenance can be easier vs. many</p> <p>Speed of implementation can be faster</p>	<p>Typically scalable, meaning you can start small and focus on your most critical business processes</p> <p>Adopt features as your business changes and grows</p> <p>Data can be entered once and used in a variety of ways</p> <p>Reporting and analytics are more reliable and robust</p> <p>Your team only needs to learn to use one type of system</p>	<p>Flexibility to add further modules later and end up with one single source of truth in the future</p> <p>You are getting a part of an already robust system</p>	<p>Encompasses the entire employee journey, from onboarding to off-boarding and every touchpoint in between</p> <p>Improved employee engagement</p> <p>Enables knowledge sharing, building online communities and connecting employees across the business to remove silos</p> <p>By grouping the tools employees need into one platform EX platforms eliminate time wasted on switching between different applications</p>
Disadvantages	<p>Having to manage multiple systems from multiple vendors</p> <p>User experience can become jerky</p> <p>Total cost can be higher due to having to pay different vendors</p>	<p>Potentially higher upfront costs</p> <p>You will be more dependent on one single vendor (this is only a disadvantage if their service is poor)</p>	<p>How smooth the end user experience will be, depends on the integration capabilities and marketplace of the software you are purchasing</p> <p>You will have multiple systems to navigate and learn</p>	<p>The challenge, is how the user interface of EX platforms manages the increasingly vast collection of capabilities and apps in a way that doesn't overwhelm users</p> <p>One tool may be easier than multiple disconnected tools, but ease of use depends on the user interface</p>
Example	Appraisal scheduling software	A system that does everything from performance management to engagement surveys	Performance Management Module	A suite solution with a robust marketplace and deep integrations for point solutions. It facilitates and tries to improve every interaction an employee has with a company.
Cost	\$	\$\$-\$\$\$	\$\$	\$\$-\$\$\$

Due to our product type we naturally lean towards suite solutions and EX platforms, but the earlier table objectively highlights that suite solutions and EX platforms outweigh the benefits offered by point solutions and

modules. StaffCircle aligns more in the category of EX platforms that of course is a type of suite solution. As such it also gives you the option to purchase individual modules.

USEFUL QUESTIONS TO CONSIDER WHEN CHOOSING

- Does the performance management system need to integrate with or be a component of other systems?
- Will you need the system to accommodate people besides full-time employees?
- To what degree will the new system impact the day-to-day work of the departments involved in the implementation (e.g. IT)?
- Do we need a quick solution or one that we can scale later?
- What is our budget and priorities?
- What is our expected growth trajectory?
- What is the ROI of implementing a new tool?



3.2 Pricing considerations

We touched on the general pricing differences between the options available. Whilst it's difficult to tell you exactly how much you should be paying or what good pricing looks like, there are some general principles that can help guide your decision-making process.

Quote vs Pricing Calculator

You might have to go down the traditional route of requesting a quotation. For this to be accurate, you would have to talk to the vendor about your specific requirements and book a demo or consultation.

In other cases, the pricing is more straight forward and based on number of licenses/users. Some software providers offer a transparent pricing tool/calculator and even a detailed return on investment report which includes savings on absenteeism and onboarding (*we fall within this category, and you can see our example [here](#)*).

Pricing components

Usually there are three pricing components to consider: the annual subscription cost; the cost of implementation and the minimum contract length you sign up for.



Subscription cost = the number of users x annual cost per user (There may be an option to turn certain additional modules on or off)



Implementation costs tend to vary, from a couple of thousand to tens of thousands. Again, due to every situation being unique, what looks good will vary from organization to organization. However, if the cost is very high, it could be a warning sign that the platform requires major configuration.



Minimum contract length often depends on the size of the spend, sometimes it is prescribed by the vendor. As software providers have to commit their resources upfront, they could waive implementation costs for a three or five year contract because these upfront investments can be absorbed. Whereas a one-year-contract is too short for the same provisions.

4 SIZE MATTERS

4.1. Software solutions for different size companies

Depending on your own circumstances your needs will vary. The size of your business will determine what type of performance management software will be most suitable. Some will only have capabilities suitable for small businesses and would not cope with the extended requirements of an enterprise, whilst others are super powerful but would be an overkill for a small company.

Generally, we tend to split the market of software solutions according to three different sizes, however it is worth noting that often there's a cross-over between the different categories.



Enterprise level



Mid-market



Apps for small businesses



4.2. Enterprise level

The goal of enterprise software is to enable the activities of large organizations, supporting a wide range of different user roles.

'Enterprise level' software usually equals suite solutions where performance management tends to be only one aspect of a broader offering.

PROS	CONS
Robust and well-known systems	Inflexible towards individual client needs and lack agility and responsiveness
Have the infrastructure to handle complex set ups domestically and even globally	The most expensive type of software – contract value tends to range between hundreds of thousands and millions
Their systems tend to be easy to configure	Often clunky user experience
Offer a wide range of portfolio	Long sales cycles
A good range of applications and integrations available in the marketplace	Can require a lot of training to deploy

4.3. Mid-market

Although there are no clear boundaries between enterprise and mid-market software, organizations between 100 – 5,000 employees tend to fall into this category. Their operations are scaled versions of enterprise

software providers with shorter sales cycles (between 6 months to a year). Similarly to their enterprise counterparts, these providers offer suite solutions with performance management being an optional element.

PROS	CONS
More personalized approach	Not as well-known as larger providers
Flexibility towards individual client needs	Might be fewer integrations and apps available
Often rapid execution	Not always suitable for complex set-ups
Lower price	Certain features might be under development
Similar to enterprise, there is a good range of applications and integrations available in the marketplace (for most mid-market software)	
More engaging user experience	
Shorter sales cycles	

4.4. Apps for small businesses

Usually in software terms, when we talk about apps for small businesses, we mean 100 employees or less. These types of apps tend to be point solutions. Here, the sales process is often

geared towards an automated, 'self-service' approach as opposed to a consultative process. Once the software is deployed, adoption is less of a concern with leaders having more visibility of their team.

PROS	CONS
Short sales cycles with a self-service approach	Not customizable
Simple 'off the shelf' solutions	Unsuitable for bespoke problems
Easy implementation and deployment	Can end up having to switch between multiple apps or systems which can make the user experience cumbersome



5 THE PITFALLS AND HOW TO AVOID THEM

5.1 Level of data and user interface

We mentioned in the beginning of the guide that the user experience for HR platforms has changed. The focus has shifted away from HR being considered as the main user of software to the employees. As such, user interface and ease of use are now critically important. If your users don't engage with the system, you'll miss out on the benefits of the insights a fully-integrated system deliver.

If the software provider offers a free trial, it could be beneficial to get a group of people (focus group or committee) together to test and evaluate the solution.

5.2 Ease of customization

Software customization refers to mapping existing business requirements and processes. The processes are automated without making changes to the existing workflows. This makes implementation smooth and easy, as opposed to one size-fits all software you can't customize. The caveat here is how easily you can make changes. Do you need to ask the vendor every time you want to amend a form field, or can you easily do it yourself? Whilst off the shelf solutions can be appealing because of their low price, you could incur hidden costs due to customization.

Branding is another consideration, where you can input into the look and feel of the software, like change in color scheme, fonts, layout, logo, menus, reports, features and more. Believe it or not, this can also impact user engagement.

5.3 Security

As HR software stores and processes large amounts of data, security could be a weak point of any solution. Usually, a custom software tends to be more difficult to hack as it requires more effort to learn how to breach the system. Additional considerations should be around a built-in virus scanner, whether the software is cloud based or not and if you have remote access to the full range of applications, with the same level of security and privacy as in-house systems.

6 EVALUATING VENDORS

6.1. Questions to ask

When you get to the point of investing into a HR solution or performance management module you will see that the volume of tools and platforms can be

confusing. So, to make sense of it all and as a degree of reassurance we recommend asking the following questions:



Of course, vendors can vary widely when it comes to customer satisfaction. However, asking a combination of the below questions should give a holistic unbiased view of their general approach to product development and customer care.

1

DOES IT APPEAL TO USERS?

Remember systems of work and think beyond just departmental leaders. Most technology nowadays has a much wider user base. Whilst an easy to use and engaging interface can help create exceptional employee experiences, a system that only leadership loves but the wider team doesn't use will be ineffective at collecting data and consequently your analytics will suffer.

2

DOES THE PROVIDER HAVE A CULTURE OF SUPPORT?

The key here is culture. This implies not only resource availability, or an initiative externally imposed by the vendor on its employees, but an inner drive that stems from the company's values and mission. Is the vendor sales-driven or flexible with their products? Vendors who really want to understand your needs will tell you if their product is a good fit for you or not.

3

DOES THE VENDOR HAVE REFERENCEABLE CUSTOMERS?

If there is evidence of positive feedback from their current user base it is likely that the provider is doing something well. Impartial and vetted review sites such as [Capterra](#) and [G2](#) will give you insight into what end users think of certain software. Case studies are also a good place to look. Are they just vague PR exercises or do they offer specific relatable results?

4

DOES THE VENDOR HAVE A POSITIVE TRACK RECORD WHEN IT COMES TO LEADERSHIP AND FINANCE?

Is their staff happy and knowledgeable when it comes to answering questions about the product? Are they growing or had any financial issues? Reviewing their online brand and understanding how their employee's engage with the company gives a broader overview.

6.2. What to ask in a demo?

Sometimes the thought of demos can be daunting. We are of the opinion that they are great for deciding whether the vendor is a good fit for you and vice-versa. This should be a two-way process, where if they can't meet your requirements, they should tell you honestly.


Otherwise, there is a risk that there will be a gap between your expectations and what is delivered in the end. They could end up promising things they can't necessarily deliver.

We have pulled together a list of questions you can ask when you participate in a demo. Your business needs will be different from other companies, so it's difficult to give feature focused suggestions. However, in section 8 we created an extensive checklist that you can use to score and evaluate different providers and solutions.

Whilst 'features and functionality' should be an important part of your decision and cost comparison, you should also ask about the future and what the vendor is planning to add to their software and when – often referred to as their product roadmap.

USEFUL QUESTIONS

- What is the background / story of the software? Which specific problems does it solve?
- Tell us about your existing clients? How do they compare to us in size and requirements?
- How do you calculate your costs? *(If you can't find information on their website, get the sales advisor to break down the calculations)*
- What integrations (software or compatible apps) do you currently have? Are you planning on adding more?
- Could you show me what we can customize ourselves (or the available customizable features)?
- How does your platform help us align performance management to our values/behaviors?
- When was the last upgrade released?
- How does licensing work?



**IMPLEMENTATION
CONSIDERATIONS**

As performance management software is really a form of IT technology, implementation decisions should be similar to those of other IT software.

A clear strategic objective (*What outcome do we want to achieve with the use of a performance management software? What problems are we looking to solve?*) should be at the core of decisions that drive performance expectations along with a correct ROI calculation.

Most reputable technology companies will put emphasis on the bottom line.

You should also consider the employee experience and 'employee personas' to have a clear vision of who will do what once the system goes live. Bottom out beforehand what would you want each group to do.

FIRST STEPS

Although a lot of software implementation can be automated it still requires some human intervention. Like any other technology, HR software requires development, configuration, and maintenance work. Therefore, it is useful to look at what is usually involved in the implementation stage.

THE PROCESS OF IMPLEMENTATION

Last but not least, we should be looking at implementation not as a linear process but more like an ongoing cycle. The process should start with gathering data then get to a point of monitoring and training the system whilst the gathering of data continues.



CHECKLIST FOR SELECTING THE RIGHT PERFORMANCE MANAGEMENT SOLUTION

This checklist is designed to guide you through 4 key aspects of any software: System Features, Implementation & Customer Support, Technical Features and costs.

Our checklist allows you to make notes, then score each element 1-5 (with 1 being a low score which indicates the element doesn't really meet your requirements, and 5 being a high score that closely aligns with what you need).

Giving an overall score to different sections and doing the exercise for each different software you are reviewing allows you to get an accurate picture of which specific areas of the software are strongest and how they compare to each other.

As this is an objective list, we covered as much as we possibly could. Of course, you can add your own bespoke criteria and disregard criteria that isn't important to you.

8.1. System Features

USABILITY		
Points to consider	Notes / Answers	Score
Is the software accessible 24/7 to users online on any browser or other platform?		
Can the software be customized with company branding and colors?		
Can single-sign on be enabled to assist with login?		
Can performance management features link to cultural features?		
Does the application integrate with email for calendar reminders and notifications?		
What is the end user training process?		

OVERALL SECTION SCORE: _____

PERFORMANCE MANAGEMENT *(Including reviews and appraisals)*

Points to consider	Notes / Answers	Score
Are there any pre-loaded templates that can be used?		
Are the performance review forms easy to configure to meet your requirements?		
Can you customise review forms yourself?		
Can the system require comments for certain ratings (i.e. can you force comments to help with the accuracy of ratings?)		
Can you weight sections of a review and/or evaluation criteria?		
Are numeric and text-based ratings available?		

Points to consider	Notes / Answers	Score
Can employees and/or managers add goals and development plans?		
Can you tie goals to organizational objectives?		
Can departments have shared objectives?		
Can users update the status of goals throughout the review cycle?		
Can the system accommodate regular, mid-year or quarterly check-ins or reviews?		

OVERALL SECTION SCORE: _____

360 PEER REVIEWS & CONTINUOUS FEEDBACK

Points to consider	Notes / Answers	Score
What features are in place to enable 360° feedback?		
Can performance review forms be 'converted' to 360° feedback?		
Can users track and view the results of 360° feedback?		
Does the system allow users to send real-time feedback to other users?		
Are 360° feedback & ongoing feedback settings configurable?		
Does the software have performance logs?		
How is feedback and/or logs incorporated into performance review forms?		

OVERALL SECTION SCORE: _____

REPORTING & DASHBOARDS

Points to consider	Notes / Answers	Score
What type of reporting features does the system offer?		
Can reports be exported into various formats?		
What dashboards do users have access to? Is this configurable?		

OVERALL SECTION SCORE: _____

8.2. Implementation & Customer Support

Points to consider	Notes / Answers	Score
Can the vendor provide a time-line example? Does this meet with your expectations?		
What is the average timescale for the implementation process?		
Will you have a dedicated person from customer success to help you manage the implementation (including set-up and project training)?		
How will training be completed? Have they got offline support materials (videos, knowledge base)?		
What kind of training do they offer?		

Points to consider	Notes / Answers	Score
Has the vendor got any reference to customer support in reviews? Is it generally good?		
Can additional training or support be obtained?		
Will you need additional support with upgrades?		

OVERALL SECTION SCORE: _____

8.3. Technical Features

DEPLOYMENT & SECURITY (HOSTED SOFTWARE)		
Points to consider	Notes / Answers	Score
What is the system uptime? (The best standards are 99.9% or higher)		
Does the vendor have security policies? What are these and how robust are they?		
Does the vendor offer encryption (they should!) What kind of encryption? (You should be looking at HTTPS protocol)		
What are the technical requirements for set-up?		
What are the technical requirements for ongoing maintenance?		

Points to consider	Notes / Answers	Score
How often does the vendor release upgrades and how are these handled?		
Are the upgrades included in the original costs / pricing?		
What safety accreditation(s) does the vendor have?		

OVERALL SECTION SCORE: _____

DEPLOYMENT & SECURITY (ON PREMISES)

Points to consider	Notes / Answers	Score
What hardware is needed for the software?		
What are the technical requirements for set-up?		
What are the technical requirements for ongoing maintenance?		
How often does the vendor release upgrades and how are these handled?		
Are the upgrades included in the original costs / pricing?		
What safety accreditation(s) does the vendor have?		

OVERALL SECTION SCORE: _____

IMPORTING DATA & INTEGRATIONS

Points to consider	Notes / Answers	Score
Can data such as employee details and records be imported into the platform?		
How are employee records and information updated?		
What other software or platform can the software integrate with?		
Does the software have an open API? (Open APIs are published on the internet and shared freely, allowing the owner of a network-accessible service to give a universal access to consumers)		
What formats can performance reviews, appraisals and other information be exported to?		

OVERALL SECTION SCORE: _____

8.4. Costs

DEPLOYMENT & SECURITY (HOSTED SOFTWARE)		
Points to consider	Notes / Answers	Score
What is included in the costs? (Only licenses or upgrades as well? What about hosting?)		
What level of technical support is included in the costs?		
Are business support costs and training costs included?		
Do set up costs include super-user and end user training?		
Are there any integration related costs?		

OVERALL SECTION SCORE: _____

COST	
Licenses and Setup:	
a) Cost per license (user/year)	
b) Total number of users	
c) Total licenses costs (a * b)	
d) Costs for additional modules	
e) Training & implementation costs	
f) Other fees (hardware, integration etc)	
Total first year costs (c+d+e+f):	
Ongoing costs:	
g) Ongoing support costs/year	
h) Ongoing license costs	
i) Total ongoing costs	
j) Contract term	
Total contract (f+j*i):	

	SECTION SCORE
8.1. System features	
8.2. Implementation & Customer Support	
8.3. Technical Features	
8.4. Costs	
OVERALL VENDOR SCORE:	

9. The Bottom Line

Having a good infrastructure for Performance Management has perhaps never been more crucial than in the world of hybrid working. The key here is ensuring that the system you implement contributes to creating better employee experiences. This way, you won't only future-proof your organization, but the system will help with talent attraction, retention and increased productivity.

There are many options when it comes to selecting the right solution. These will vary from business to business. First, we recommend conducting a situation analysis which will help you clarify your main objectives and what is it that you want to achieve.

Then you should consider your growth trajectory and the size of your business. These will impact on the type of vendor you should seek out. Clarifying your goals and drivers behind the need for implementing a new solution will also help determine the type of software that will benefit you most.

This can be a point solution (focusing on one specific area) modules (bolt-ons parts of another robust system) suite solutions ('one-stop-shop' or a more overarching system) or an Employee Experience platform (essentially a suite solution that combines engagement, wellbeing, productivity, collaboration, and communication tools).

Other considerations we recommend include, costs, training, customer support, security, implementation, user interface, ease of customization and future plans regarding technical developments.

We hope you find this guide useful and that it will provide you with a solid framework. The aim here is to give you the best overview to help you decide what is most suitable for your own unique situation. And if you do decide to [check us out](#) to be a contender, we will love it! We will also tell you if we don't turn out to be a good match. After all, all good relationships are built on trust.

- Mark and the StaffCircle Team



Comms and Culture
Create exceptional employee experiences and drive engagement

A laptop and a smartphone are shown side-by-side. The laptop screen displays a dashboard with various charts and graphs, including a bar chart and a circular gauge. The smartphone screen shows a similar interface with a list of items and a circular gauge.

Success Circles Competency Framework
Link employee feedback to competencies or values of your organisation

A laptop screen displays a dashboard with a central circular gauge and several data points. The interface is clean and modern, with a dark blue header and white content area.

Microsoft Teams Integration:
Complete many of your HR tasks with Microsoft Teams

A laptop and a smartphone are shown side-by-side. The laptop screen displays a Microsoft Teams chat window with a message and a card. The smartphone screen shows a similar interface with a list of items and a circular gauge.

Objectives Heat Map:
Departmental Performance at a glance

A laptop screen displays a heatmap with a grid of colored cells (red, yellow, green) representing performance data. The interface includes a header with navigation options and a list of items below the heatmap.

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.

[staffcircle.com](https://www.staffcircle.com)

