

Life after Appraisals!

Reinventing performance management for the new world of work



Stuart Hearn

Founder & CEO



Performance Management



Performance Development



Helping people develop and
perform to their full potential.



ing areas in terms of their current (and if applicable, 7 = good, 10 = excellent). If appropriate provide s with the self-appraisal in. Discuss and note shes.

others (for current or new role):
18. corporate responsibility and ethics

tasks have been performed. ensure that the job description if required

N/A	Poor	Satisfactory	Good	Excellent	Comments

APPRAISAL FORM

org/division/dept:	position:	ref:
name:	time in present position:	length of service:
year or period covered:	appraisal venue:	appraiser:
appraisal date & time:		

Appraiser to complete before the interview and return to the appraiser by (date)

why?



Operational Excellence

Themes:

- Leverages technology and data
- Cost effective management
- Project leadership and management
- Executes plans and strategies with efficiency and effectiveness

Level 1 Requires Development	Level 2 Proficient	Level 3 Highly Proficient	Level 4 Role Model
<ul style="list-style-type: none"> • Demonstrates basic competency on relevant MS Office products and applications to perform the essential duties and functions of current job role. 	<ul style="list-style-type: none"> • Consistently leverages technology 	<ul style="list-style-type: none"> • Aligns business requirements to the appropriate functional or DOE technology solution. Develops innovative ways to analyze data, resulting in new productivity gains. 	<ul style="list-style-type: none"> • Expertly influences others to agree on needed outcomes, based on cost-impacting arguments. Anticipates cost changes and recommends the best solution for cross-divisional groups.
<ul style="list-style-type: none"> • Inconsistently manages projects and plans cost-effectively. Does not proactively identify and recommend the most cost-efficient course of action that benefits the team/group. 	<ul style="list-style-type: none"> • Develops clear and measurable objectives with available options and resources. 	<ul style="list-style-type: none"> • Applies most cost-effective solution to meet organizational needs. 	<ul style="list-style-type: none"> • Is sought after for leadership and project management expertise. Spends times teaching others expertise and knowledge. Has courage and determination to raise and
<ul style="list-style-type: none"> • Infrequently develops projects or work plans which measure and effectively track needed progress. 	<ul style="list-style-type: none"> • Develops clear and measurable objectives, goals, and metrics with needed milestones to assess progress against plans. Takes ownership and responsibility for the project. 	<ul style="list-style-type: none"> • Applies appropriate and timely judgment to know how and when to assess changes that need to be addressed to ensure quality and efficiency. Can translate strategy into action, and is an expediter. 	<ul style="list-style-type: none"> • Is sought after for leadership and project management expertise. Spends times teaching others expertise and knowledge. Has courage and determination to raise and
<ul style="list-style-type: none"> • Gathers information as needed or 	<ul style="list-style-type: none"> • Demonstrates functional 		

COMPETENCY FRAMEWORK

①
Near-term
goals

②
Feedback
asap after
an event

③ Regular,
future-
focused
conversations

④
Meaningful
dialogue over
form filling

= Better
differentiate
performance

F E A R

CONFUSION





How can I get managers to have more regular conversations?



How should I handle pay and promotions without appraisals?



How will I get buy-in from senior leadership?

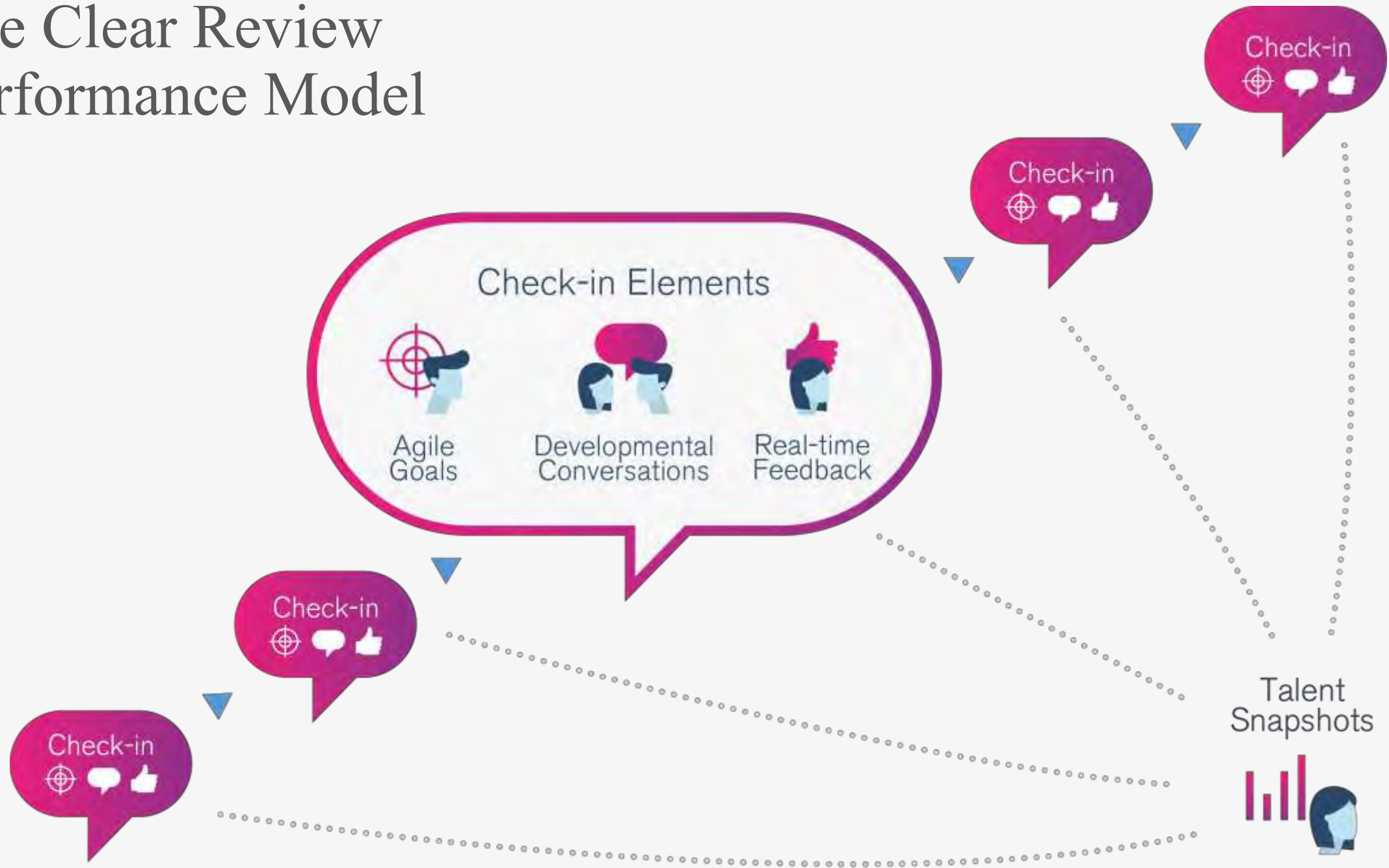


How will I know whether my managers are doing it?

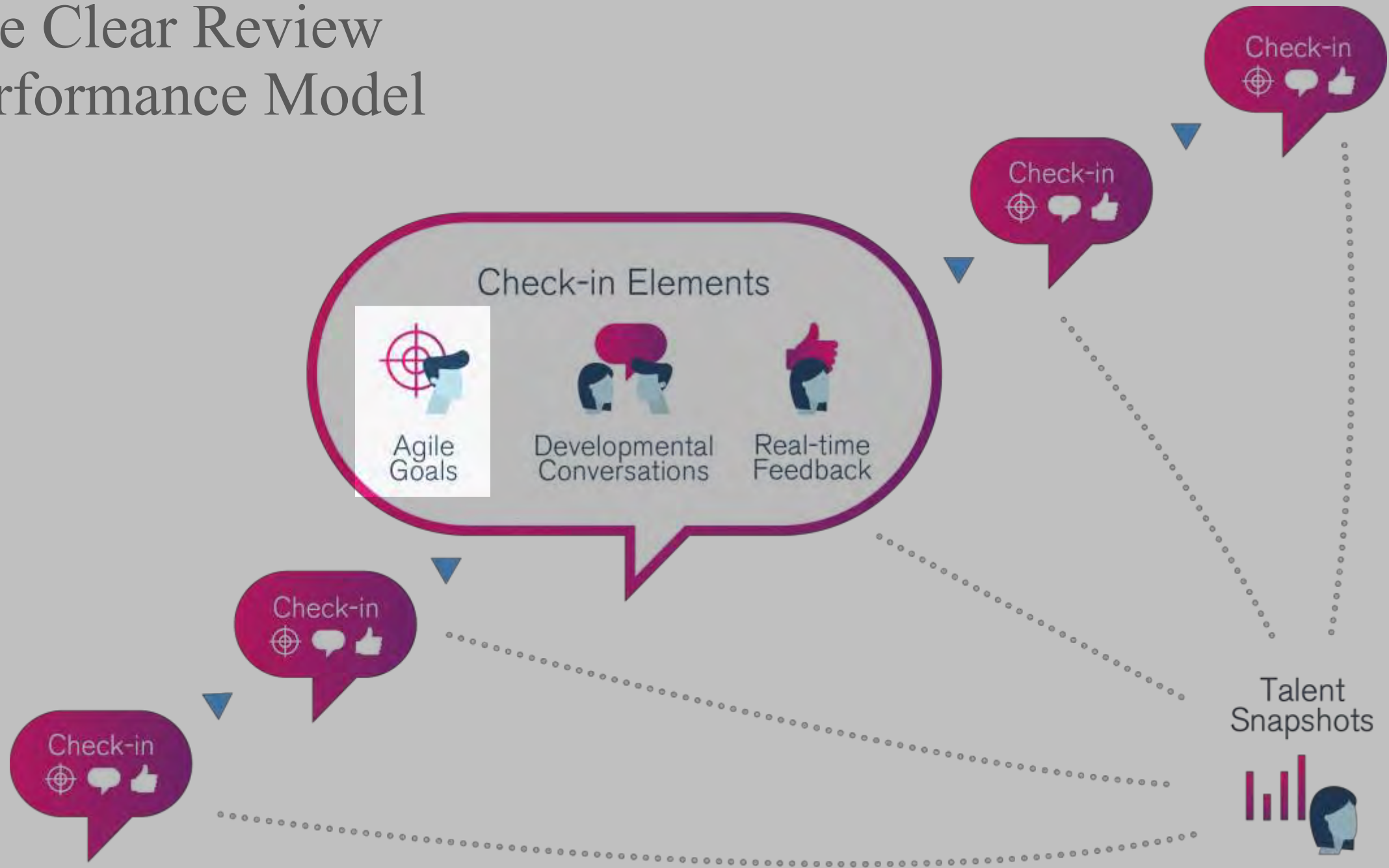
How can I encourage feedback to be given more frequently?



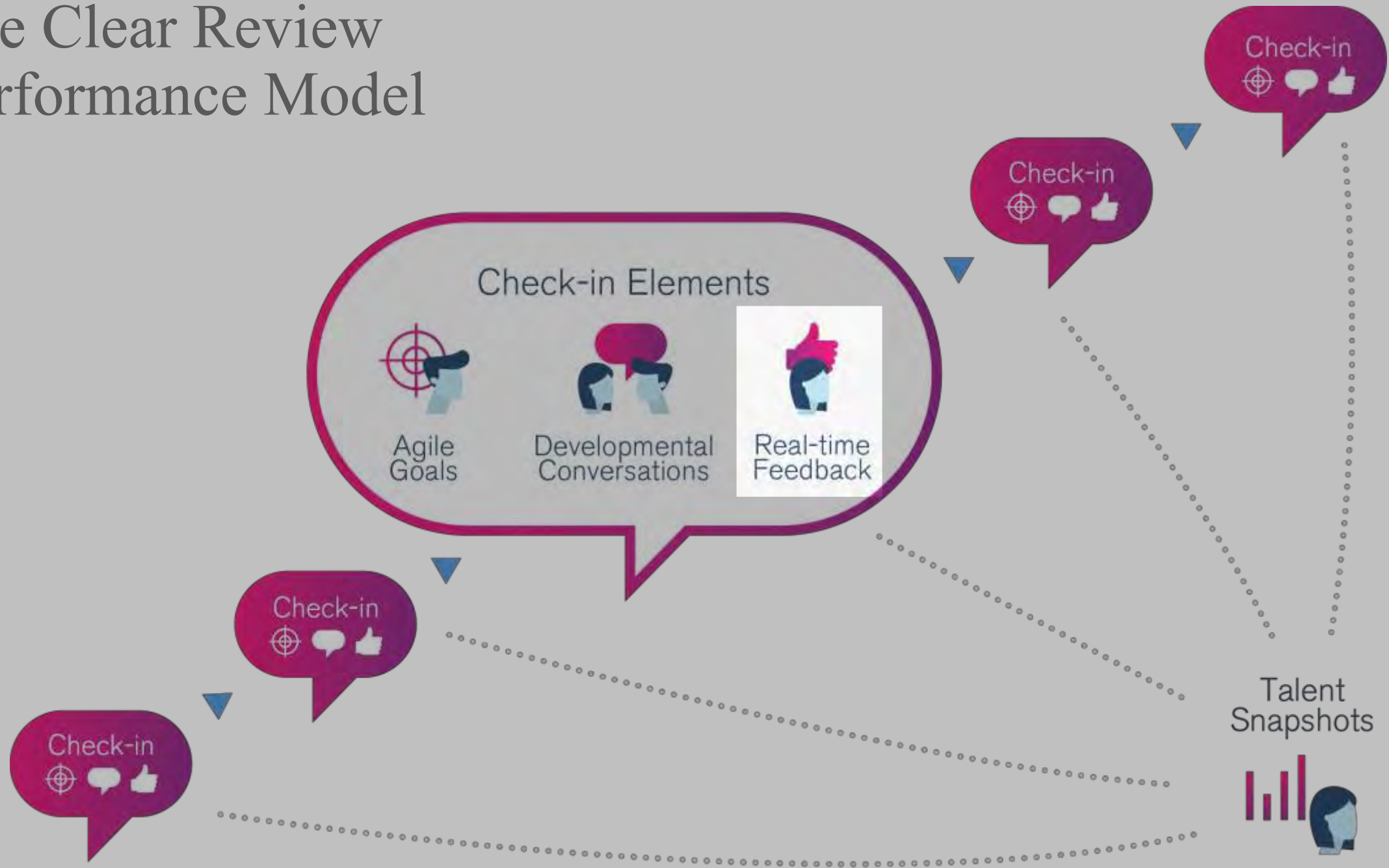
The Clear Review Performance Model



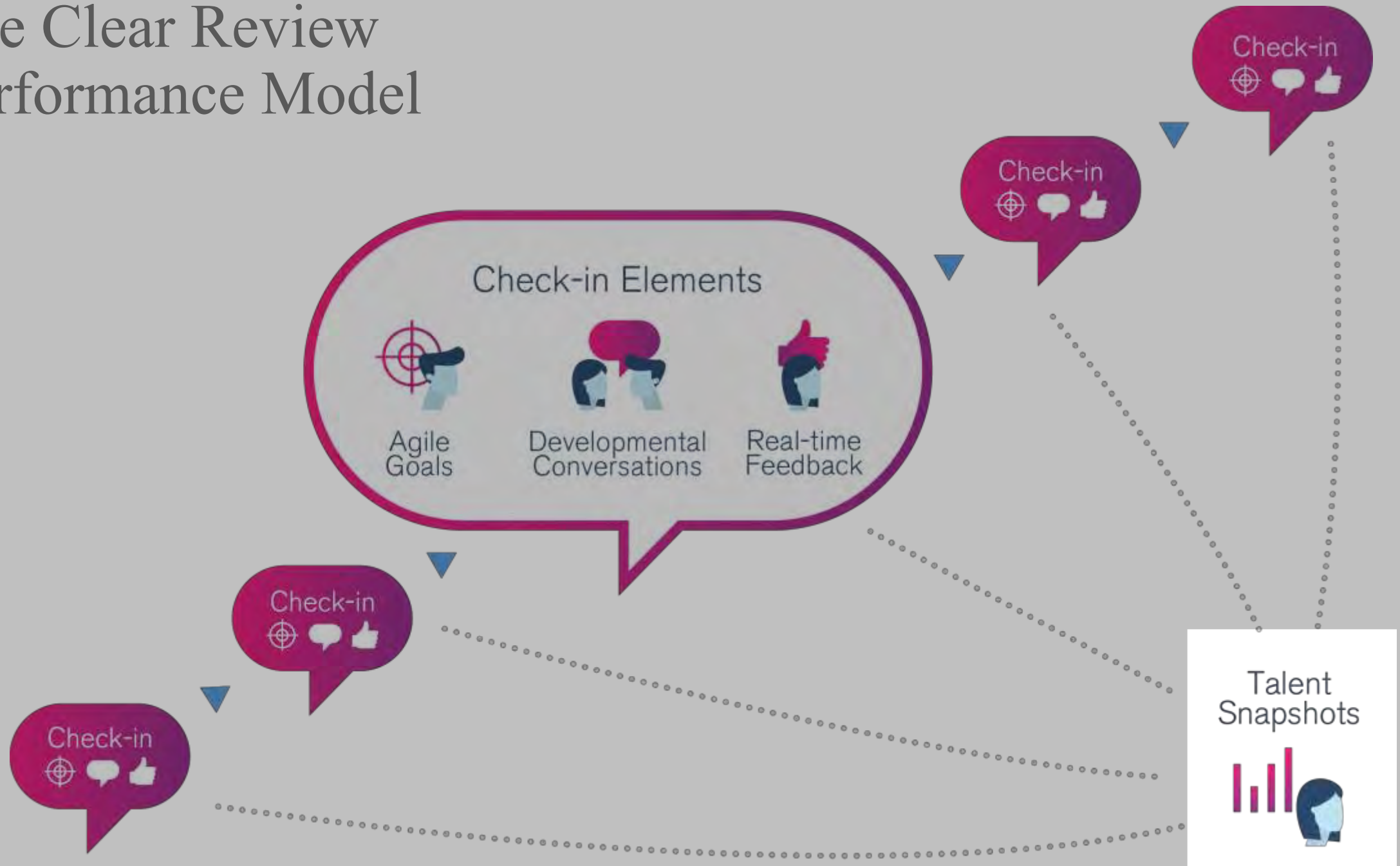
The Clear Review Performance Model



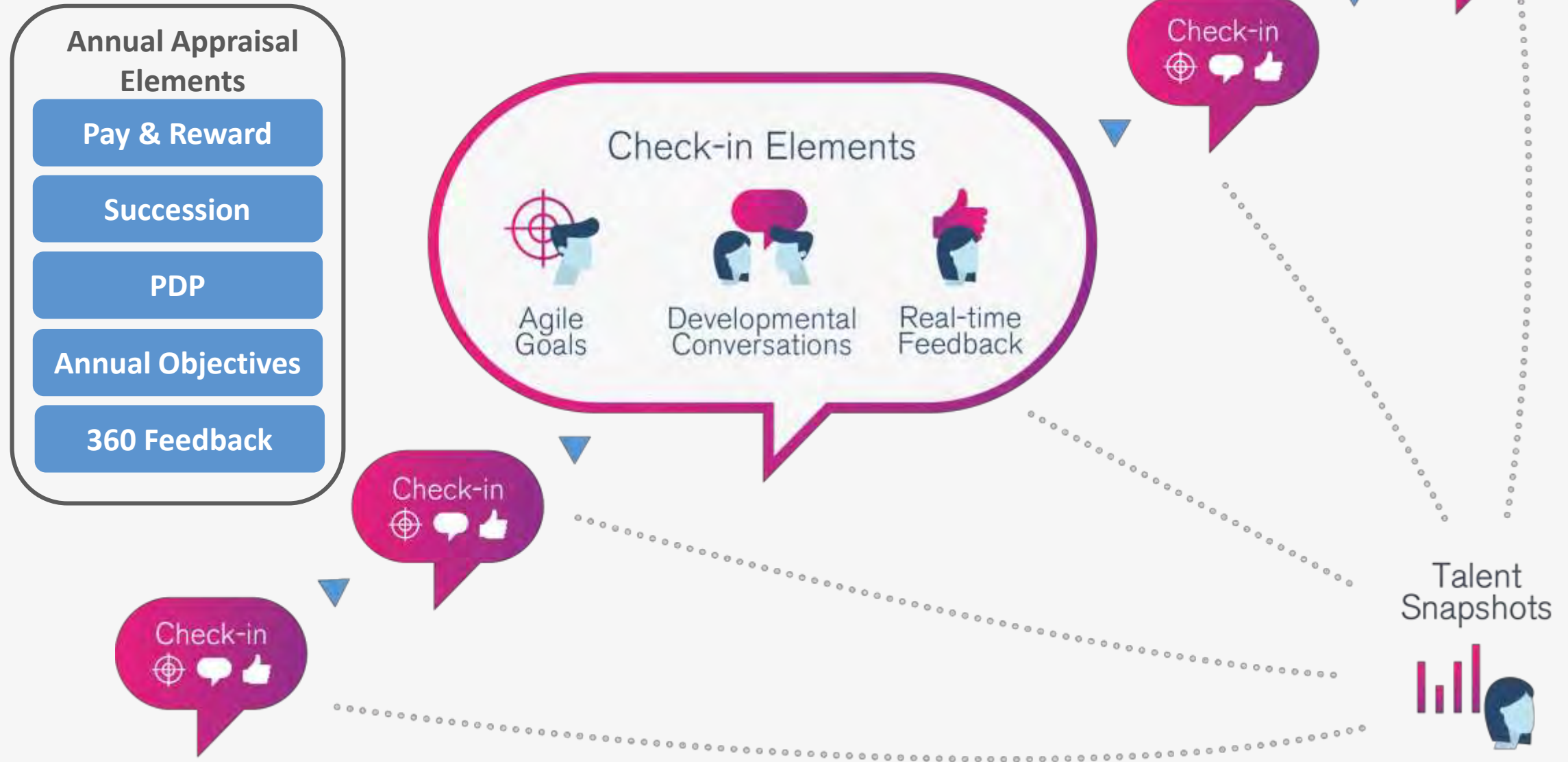
The Clear Review Performance Model



The Clear Review Performance Model



The Clear Review Performance Model



CITY OF LONDON
OFFICE OF RAIL AND ROAD
Waltham Forest
Llywodraeth Cymru Welsh Government
Valuation Office Agency
THE SUPREME COURT

Public Sector



Virgin money
LMAX EXCHANGE
Clydesdale Bank
CAXTON fx
REDINGTON
 Financial Services

CELLO HEALTH INSIGHT
CLINIGEN GROUP PLC
KIMAL
star
 delivering healthcare innovation
 people for healthcare
 uniphar

Healthcare/Pharma

AMNESTY INTERNATIONAL
GREEN CLIMATE FUND
GREENPEACE
 Not for Profit
INVESTORS IN PEOPLE

HarperCollins Publishers

PINEWOOD
CSM
 Media & Advertising
doc10

RICOH
 northern ireland water

Aston Villa Football Club next

Coventry University
AQA
tes global
LEIGH Academies Trust
 Education

Steelcase

cintra
metaswitch
omnitracs
 innovation, driven.
exponential-e
 APPLIED INNOVATION
Technology
SOVA
SMARTASSESSOR
 Next Generation E-Portfolio Software

JACK WILLS
FIGLEAVES
Interpet
DERWENT GROUP HOLDINGS

Kennedys
GERALDEVE
gleeds
chaucer.
 CONSULTING
steer davis gleave
 Professional Services

Common Success Factors



Started with why



Talked and listened



Built momentum

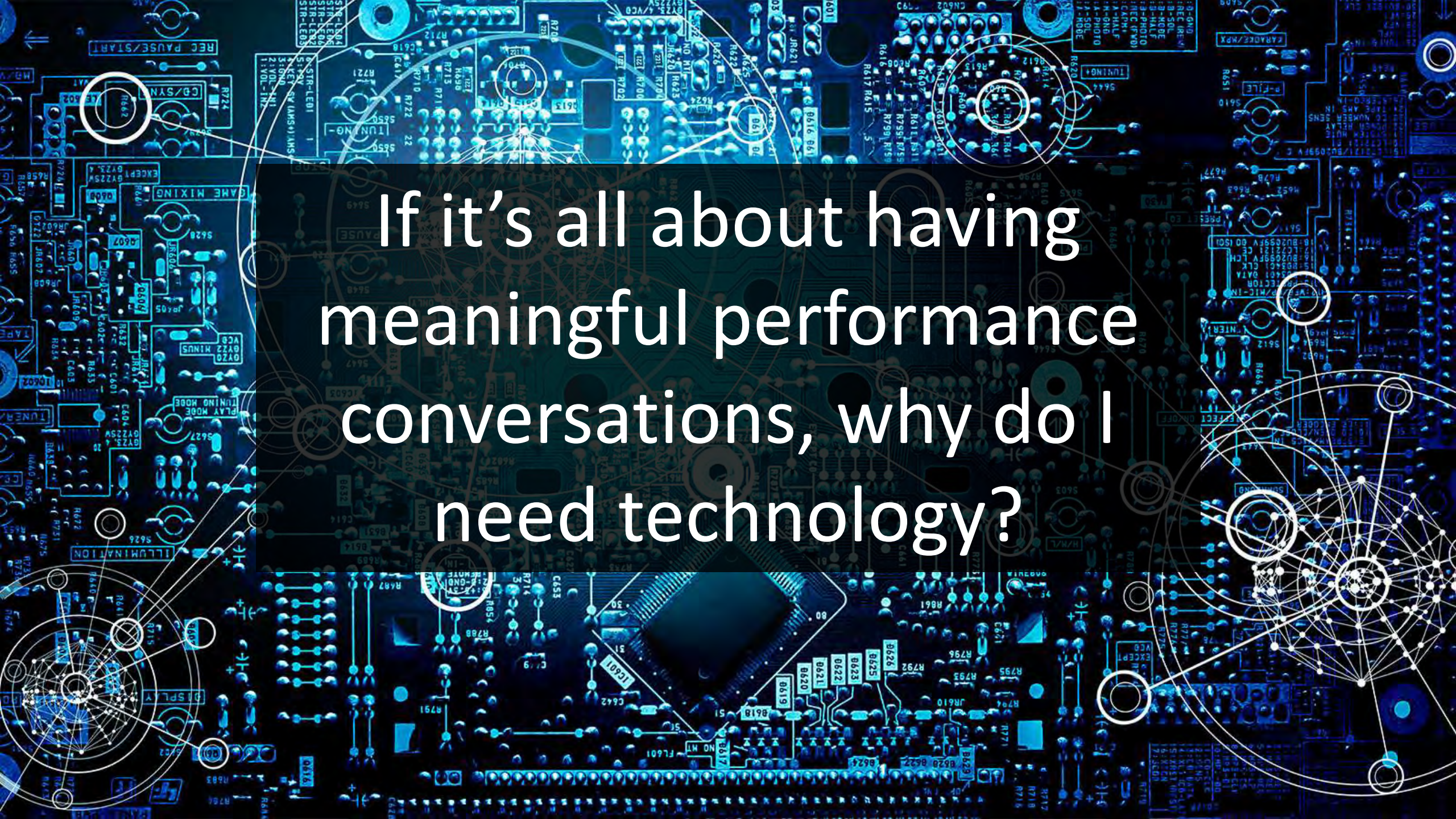


Created accountability



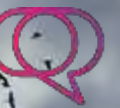
Used the right technology





If it's all about having meaningful performance conversations, why do I need technology?

1. Visibility





Valuation Office Agency

- Part of UK Central Government
- 4,000 employees
- Multiple sites





Reports

Stuart Hearn ▾

Goals

Feedback

Check-ins

Actions

Your Team

Reports

Admin

Goals



have 1 or more current Goals

Feedback



Check-ins



have had a Check-in in the last 12 weeks

Detailed Reports

Goals by person

Download

Personal Development Goals

Download

Performance Goals

Download

Check-ins by person

Download

Feedback by person

Download

Key metrics

Active users in the system: **16**

Current Performance Goals: **13** of which **1** is not yet approved

Current Personal Development Goals: **5** of which **0** are not yet approved

Check-ins in the last 12 months: **18** for **15** people from which **11** actions were assigned

Feedback in the last 12 months: **21** comments by **10** people

The image shows a low-angle shot of a complex, multi-level metal framework, likely a scaffolding or a structural steel frame for a building. The structure is composed of numerous vertical and diagonal beams connected by joints, creating a dense, geometric pattern. Several workers are silhouetted against the bright blue sky, working on different levels of the structure. The workers are positioned at various heights, some appearing to be climbing or adjusting the framework. The overall scene conveys a sense of industrial activity and structural complexity.

2. Framework



Our New Performance Approach



Goals



1-3 quarterly goals



Feedback



Given at least monthly



Check-ins



Every 12 weeks





Your Team

[Help](#) [Print](#)

[+ Add team goal](#)

Direct Team

Wider Team

Talent Reviews

Stuart Hearn ▾

Goals

Feedback

Check-ins

Actions

Your Team

Goals



88%

have 1 or more current Goals

[Report](#)

Feedback



75%

have received feedback in the last 4 weeks

[Report](#)

Check-Ins



88%

have had a Check-in in the last 12 weeks

[Report](#)

	Goals	Feedback	Check-ins	Actions	Summary
Debbie Jameson		Needs			
Benjamin Longacre			Due		
Stephanie Chung	1 overdue				



Your Team

Help

Print

+ Add team goal

Direct Team

Wider Team

Talent Reviews

Stuart Hearn

Goals

Feedback

Check-ins

Actions

Your Team

Goals



have 1 or more current Goals

Report

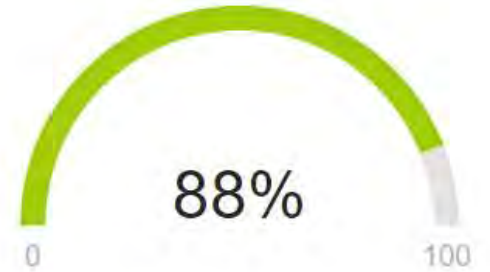
Feedback



have received feedback in the last 4 weeks

Report

Check-Ins



have had a Check-in in the last 12 weeks

Report

	Goals	Feedback	Check-ins	Actions	Summary
Debbie Jameson					
Benjamin Longacre					
Stephanie Chung					



Your Team

Help

Print

+ Add team goal

Direct Team

Wider Team

Talent Reviews

Stuart Hearn

Goals

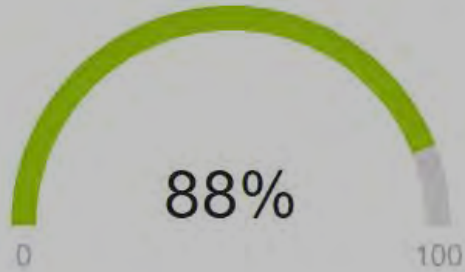
Feedback

Check-ins

Actions

Your Team

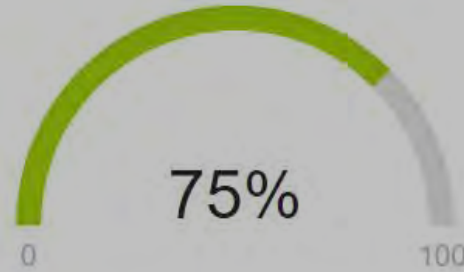
Goals



have 1 or more current Goals

Report

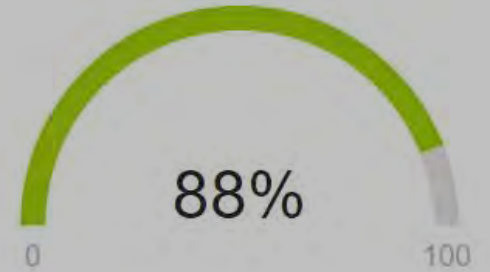
Feedback



have received feedback in the last 4 weeks

Report

Check-Ins

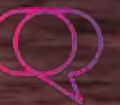


have had a Check-in in the last 12 weeks

Report

	Goals	Feedback	Check-ins	Actions	Summary
Debbie Jameson					
Benjamin Longacre					
Stephanie Chung					

3. Behaviour Change



Fogg Behaviour Model





$$B = MAT$$

Behaviour = Motivation
Ability
Trigger



Triggers

You are due for a Check-in meeting Updates x


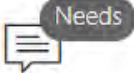










 **ClearReview** via [amazonses.com](#) 10 Jun (4 days ago)   

Oliver,

It's time to arrange a Check-in meeting with Debbie Jameson. You should be having a Check-in meeting with Debbie at least every 12 weeks.

Before the meeting, remember to update your progress against your objectives [here](#).

When you hold your meeting, please ensure that you or Debbie create a Check-in Meeting record and capture any arising actions and notes [here](#).

	Goals	Feedback	Check-ins
Debbie Jameson			
Benjamin Longacre			
Stephanie Chung			
Amelia Khan			



Ability



Time



Brain Cycles



Disruption



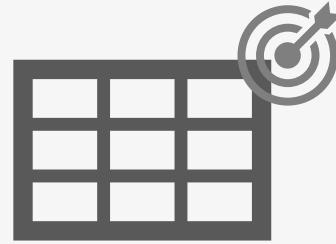
Preparing for a Check-in Conversation



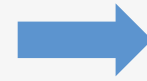
Notes



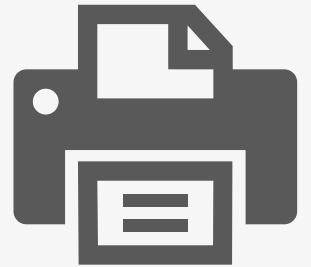
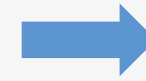
Guidance



Objectives



Feedback



Print





Amita Kaur's Check-ins

Help

Print

+ Add a check-in



Stuart Hearn

Your Team

Amita Kaur

Goals

Feedback

Check-ins

Actions

Summary

Upcoming



None



Schedule

This month



No Check-ins

August



24 August 2018
with Stuart Hearn

July



13 July 2018
with Stuart Hearn

June



22 June 2018
with Stuart Hearn



Show more

Preparing for a Check-in

- ① Ensure that progress made against goals is up to date on the Goals screen.
- ② Click below to view a printable summary of goal progress and feedback.
- ③ Add a Check-in if you have not already done so.

View summary



Check-in Meeting: Amita Kaur

with Stuart Hearn on 29 Sep 2018 [Change date](#)

Stuart Hearn ▾

Your Team

Amita Kaur ⊗

Goals

Feedback

Check-ins

Actions

Summary

Prompts for Discussion

- **Actions from last check-in.** Have agreed actions been completed? If not, what can be done to ensure they are completed in the next week?
- **Goals.** What progress has been made? Are there any obstacles? How might they be overcome? Do any goals need to be added or changed?
- **Feedback.** Review recently received feedback. Does it highlight any strengths or areas for development?
- **Using strengths.** Has the individual been able to do what they do best in their role recently? How can they better utilise their strengths on a day-to-day basis?
- **Issues or concerns.** Does either party have any issues or concerns to discuss? What specific actions will be taken to address them?

Actions

Add an action...

2 actions from last Check-in

Notes

Add a note...

2 notes from last Check-in





Check-in Meeting: Amita Kaur

with Stuart

Stuart Hearn

Your Team

Amita Kaur

Goals

Feedback

Check-ins

Actions

Summary

Notes from last Check-in



Stuart Hearn All objectives on track except branding objective. We agreed actions to unblock this and get it back on track.

09 Feb 2016 12:00

Prom

- A t
- C
- or changed?
- **Feedback.** Review recently received feedback. Does it highlight any strengths or areas for development?
- **Using strengths.** Has the individual been able to do what they do best in their role recently? How can they better utilise their strengths on a day-to-day basis?
- **Issues or concerns.** Does either party have any issues or concerns to discuss? What specific actions will be taken to address them?

Actions

Add an action...

2 actions from last Check-in

Notes

Add a note...

2 notes from last Check-in



Check-in Meeting: Amita Kaur

with Stuart Hearn on 29 Sep 2018 [Change date](#)

Stuart Hearn ▾

Your Team

Amita Kaur ⊗

Goals

Feedback

Check-ins

Actions

Summary

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- **Issues or concerns.** Does either party have any issues or concerns to discuss? What specific actions will be taken to address them?

Actions

Add an action...

2 actions from last Check-in

Notes

Add a note...

2 notes from last Check-in





Ch
with

Amita Kaur's Goals

+ Add goal

Current History

Expand all

Stuart Hearn

Your Team

Amita Kaur

Goals

Feedback

Check-ins

Actions

Summary



Performance Goals

Run management training workshops on giving and receiving feedback

Due: 30 Nov 2018

On track

Options

Create and communicate new 3 year HR action plan

Due: 21 Dec 2018

Not started

Options

Personal Development Goals

Understand the key concepts of continuous performance management

Due: 01 Dec 2018

On track

Options



Stuart Hearn ▾

Your Team

Amita Kaur ⊗

Goals

Feedback

Check-ins

Actions

Summary

Ch
with

Amita Kaur's Feedback

Feedback Received



Katie Murray

Thanks for staying late last night to help me with the board report. Really appreciate your support and commitment to your team.

16 Jan 2018 16:22



Stephanie Chung

Thanks so much for the fast turnaround on the customer report. It really helped me out!

14 Jan 2018 17:38 Delight Customers



Christopher Peake

For the next presentation, perhaps email out the handouts to attendees after the event rather than providing printed copies on the day.

14 Jan 2018 17:36 Keep it Simple



Debbie Jameson

I received some great feedback from customers about the

Feedback Given



Well done on bringing in that new client. That's really going to help us to achieve our quarterly sales target.

28 Oct 2018 8:32 Make an Impact



I thought your presentation at the monthly meeting was insightful, informative and to the point.

28 Oct 2018 8:31 Make an Impact



Might be worth trying to involve key stakeholders in advance of the next project to reduce opposition.

28 Oct 2018 8:31 Collaborate



You did a great job, the project was on-time and on-budget. Well done.

Feedback requested:

"How I managed the purchase order system rollout"

04 Aug 2016 11:53



Check-in Meeting: Amita Kaur

with Stuart Hearn on 29 Sep 2018

Change date



Stuart Hearn

Your Team

Amita Kaur

Goals

Feedback

Check-ins

Actions

Summary

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Actions

Amita Kaur Circulate first draft of HR roadmap to team

Due: Fri 05 Oct 2018



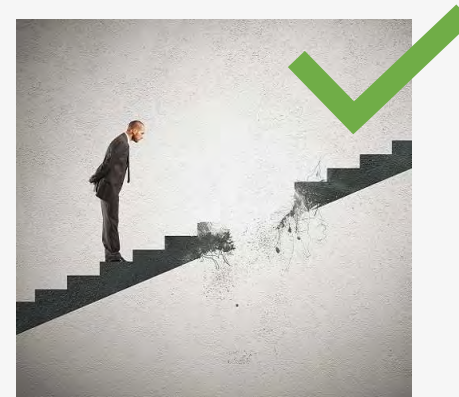
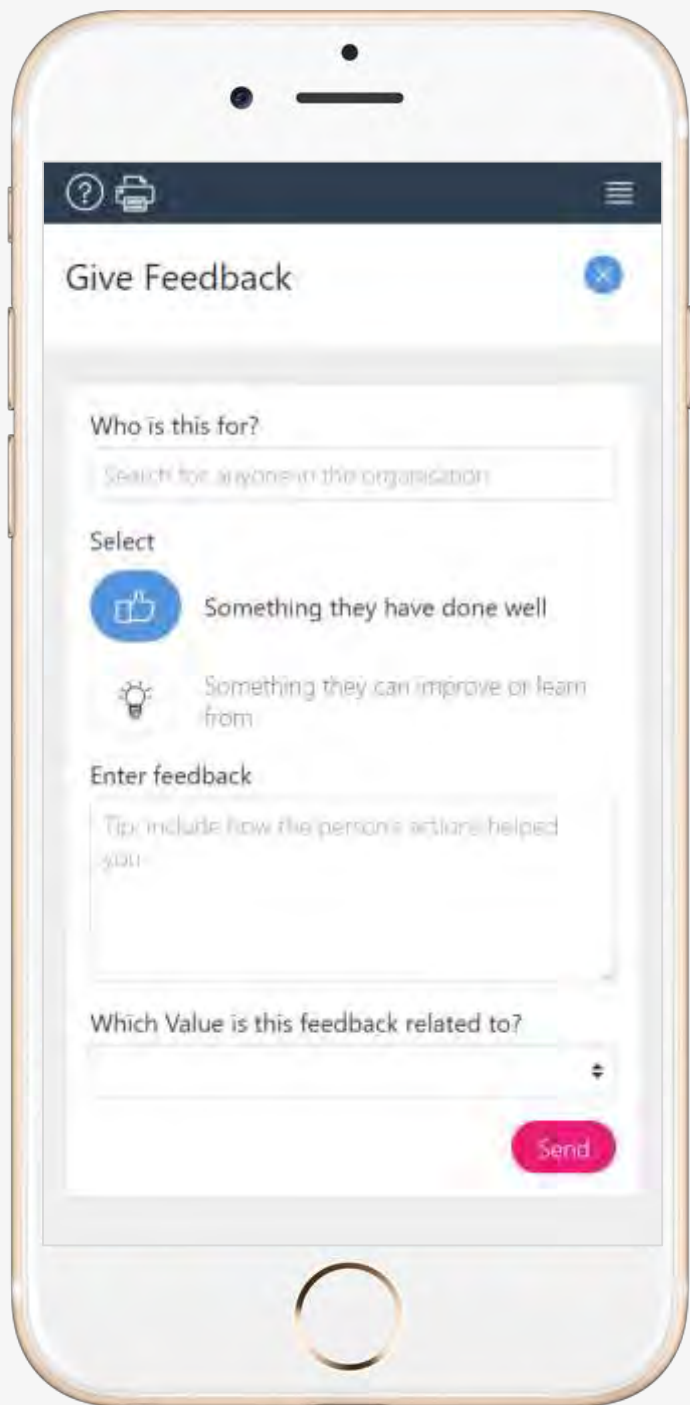
Notes



Stuart Hearn Discussed how milestones need to be reviewed weekly with team to ensure projects stay on track

29 Sep 2018 12:45





“It adds real structure and I look forward to receiving and giving feedback”

Kerry Bircumshaw, Bank Manager



Tech as a Behaviour Catalyst

Action in Clear Review:

Having a conversation



Resulting Behaviour:

↑ 33%

Feedback Mindset Behaviour



Data from 50,000 users

Resulting Behaviour:

↑ 48%

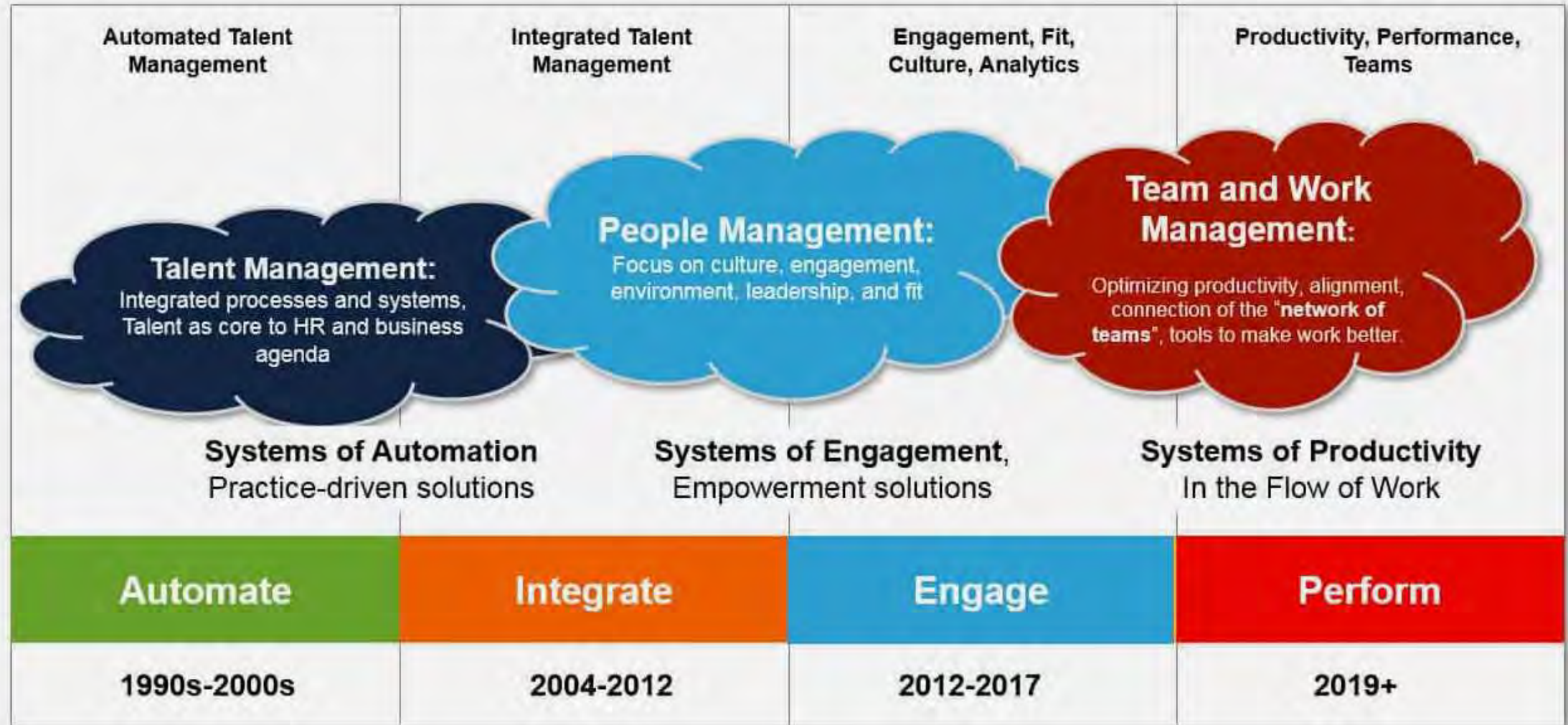
High-Quality Conversation Behaviour

Action in Clear Review:

Giving/Receiving Feedback



Talent Technology Evolution



Source: Josh Bersin



A.I.



Success Story



10,000 employees



Goals

100%



Check-ins

99%



Feedback

78,000

↑ Employee Engagement

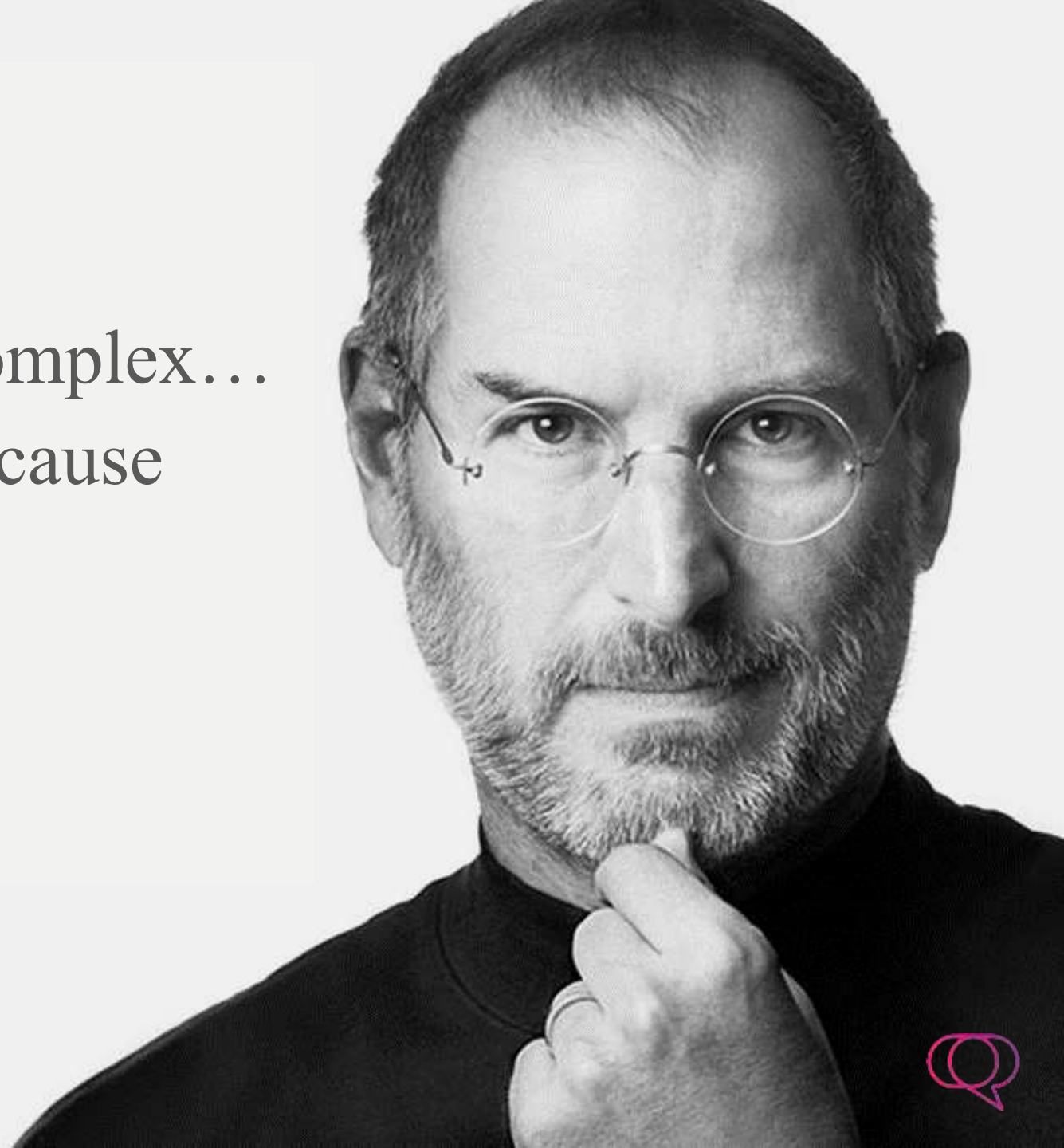


Simple.



“Simple can be harder than complex...
but it’s worth it in the end because
once you get there,
you can move mountains.”

Steve Jobs



“Building a high-performance coaching culture is an ever-evolving project, not a final destination.”

Sarah Lee-Boone, Director of People & OD

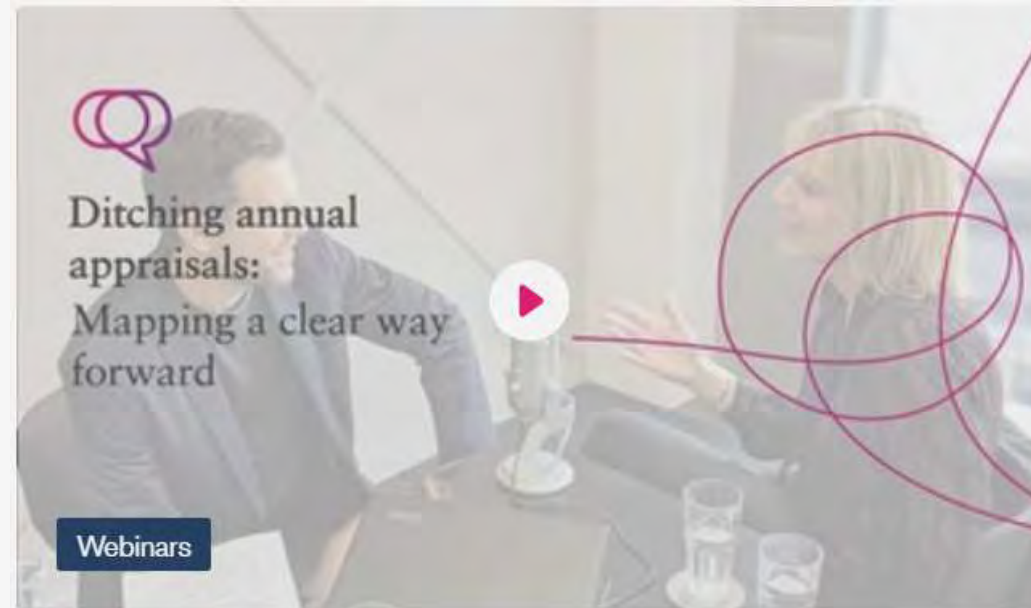
CIM

The Chartered
Institute of Marketing



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Your Questions



Stuart Hearn
Founder & CEO | Clear Review



www.linkedin.com/in/StuartHearnUK