

Qualification: CIPD Diploma in Applied Human Resources

Module Name: Contributing to improving Individual and organisational Performance

Word Count: 2373

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By signing below, I confirm that the work/evidence presented is my own, unaided work. I understand the regulations pertaining to candidate malpractice and the action that may be taken as a result.

Signed: Sarah Chislett

Date: 17/09/19

Appendices

1. Performance Management Policy
2. Performance Management Procedure
3. Link to WISE (Local Intranet)
4. KPI template for agents
5. Coaching template for agents
6. Performance action plan template
7. Performance management cycle
8. Performance Management Training
9. Performance Review Training
10. KRA and Values for Team leaders/ Operational managers and support staff
11. PAS details
12. Performance review framework
13. Witness statement
14. Personal development plan
15. 360 Feedback
16. Job description
17. Bonus Criteria
18. Advise and support given to Team Leaders
19. Advise are Performance management
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21. Refer a friend
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23. Training Survey
24. Webhelp Values
25. SMART Chat and PAP refresher training

Contributing to improving Individual and Organisational Performance

Armstrong and Baron (2004) state that performance management is a process which contributes to the effective management of individuals and teams in order to achieve high levels of organisational performance. Performance management within Webhelp is one of the most used policies. We have a policy (Appendix 1) and a procedure (Appendix 2) both of which are available on our company intranet (Appendix 3).

To engage an employee to perform should not be a difficult task Purcell's AMO model explains how employees need to have the ability and skill which can be gained through the correct training, the motivation and incentives which for Webhelp this predominately is our bonus scheme and the opportunity to participate, allowing employees to be involved in processes gives them opportunities to feel empowered and engaged and want to do better regardless of their role (Employment-studies.co.uk, 2019).

As with most High performing Work organisations we have values which we expect all employees regardless of work level to adhere too, these are WOW, integrity, recognition, commitment and unity. During training everyone will be made aware of these values and it is explained that these are the behaviours we expect all employees within our organisation to demonstrate.

There are two different processes for performance management depending upon your work level. For agents they are managed through Key Performance Indicators (Appendix 4) and have weekly coaching and side by side feedback sessions (Appendix 5) to help support them with their day to day performance. This process would all be documented on the agent's cascade which is their personnel record, and this is used to build a bigger picture on their performance to understanding if they are meeting the targets required or whether they need additional support through a Performance Action Plan.

Performance Action Plans (Appendix 6) are a support process to get an employee from underperforming to optimising their performance, employees often see this process as a negative however this process is a 16-20-week process with an end goal of everyone being retained and performing to the required standard. A Blog published by Emperform states that the process of identifying root causes of poor performance, outlining clear expectations for improvement, and giving the employee a chance to remedy shortcomings, could not only save time and costs related to termination and re-hiring, it creates a culture of performance accountability for employees and their managers (CRG emPerform, n.d.). Attrition is one of the key focuses within Webhelp which is why Performance Management is so important to our organisation.

The cycle for Performance management (Appendix 7) begins with a Team Leader having a conversation with the employee to explain what they have noticed about their performance and give the employee an opportunity to be able to improve. This is built into their 121 coaching. We would normally allow between 2-4 weeks for this process. If there is no improvement after this time period, we would then move forward with issuing the

ensure managers are well equipped to deal with all situations. There is also the Employee Rights Act 1996 which includes an employee's contract, wages, paid time off, health and safety, statutory rights and dismissal. Between the Senior People Advisor and the PAS team they should eliminate any risks when it comes to the performance management of an employee.

We have recently dealt with a case where an Operations manager has asked if could demote a team leader to an agent as the team leader has been suffering with severe morning sickness and wanted support with accommodating their hours and duties short term. Having spoken to the operations manager and explained that under the Equality Act there was 9 protected characteristics and Pregnancy was one of them and that they would not be able to manage the team leaders performance due to her requiring support during her pregnancy, the Operations manager stated this had been going on for some time however there was nothing evidenced on the team leaders cascade so I advised if there was an issue with the team leaders performance they should follow the correct process as stated within the Webhelp policy to ensure we are not discriminating anyone.

I have also supported a member of the support team Claire, who has recently progressed throughout the business. She has gone from an associate consultant to a senior consultant and has recently been given a team of people to manage. Claire has recently attended her training and found that a member of her team was on a Performance Action Plan, Claire felt the process was daunting due to the fact that she hadn't managed a team before and that she hadn't started the process but was having to pick the process up half way through. I offered additional support to Claire ensuring she fully understood the process and how we would make sure that the objectives were SMART and that we weren't setting anyone up to fail throughout this process (Appendix 13)

It is also important to remember that whilst there are times, we need to support performance because they not achieving certain targets there is also going to be times when we people will be excelling in their performance and will want help to develop. This can be done through a Personal Development Plan (Appendix 14) and gaining feedback through 360 feedback and face to face feedback could support a developing employee. Woodhams states that in recent years 360-degree feedback has received a great deal of attention due to ratings being given not just by the next manager but also by organisational hierarchy (2016, pp.210) (Appendix 15).

Performance Management Policy (UK, India & South Africa)

Document Control			
Document Revisions	Version (V)	Revision Date	Revisions By
Performance Management Policy	V1	13.07.2011	
Performance Management Policy review	V2	26.11.2013	Melanie Buckley
Policy Review and restyle	V7	01.04.2014	Luke Kinsella
Version Control Register	V7.1	05.11.2014	Lorraine Shaw
Performance Management Policy (UK, India & South Africa)	V8	10.08.2015	Lynn Smith
Small amendment to suit South Africa	V8.1	12.02.2016	Shona Smith
Additions to update	V8.2	19.11.2017	Bryony Alexander

Introduction

In line with our values, this policy has been developed to demonstrate our **commitment**, **unity** and **integrity** in creating a culture of continuous improvement and to treat you the way we would expect to be treated with regards to performance.

It is our aim to foster a culture of high performance and achievement, supporting you to be the best you can be. We want you to reach your full potential in your role and will encourage you every step of the way to reach the highest standards of performance.

What is Performance Management?

Performance management is a continuous process of developing, maintaining and improving performance and is based on the principle that the performance of each individual within the organisation contributes to the organisation's overall performance in the achievement of its goals.

Why do we need a Performance Management Policy?

Webhelp UK, India and South Africa is committed to delivering an outstanding service to its customers and clients. In order to achieve this it is important that we have a robust performance management framework in place for setting and clearly communicating performance standards and expectations, observing and providing feedback, and reviewing your performance either through regular coaching sessions or performance review meetings with your Line Manager.

Who does this Policy apply to?

This Policy applies to all employees of Webhelp UK, India and South Africa. It also applies to those people operating on behalf of Webhelp, such as contractors and agency staff. In these situations the Manager responsible for the contractor or agency member of staff will be responsible for making them aware of this Policy.

I am a Contact Centre Associate (CCA); how will my performance be reviewed?

As a Contact Centre Associate (also known as an Advisor or Agent), you will have regular coaching/1-1 sessions with your Line Manager where you will receive feedback on your performance as well as discussing any support, training or development required to enable you to maintain and improve your performance in your role.

I am not a CCA; how will my performance be reviewed?

This policy is non-contractual and may be varied, altered or replaced from time to time and the company reserves the right not to apply certain aspects of the policy if it is appropriate to do so.

Performance Management Policy (UK, India & South Africa)	HRP09	V8.2	Official Use Only	13.07.2011	19.11.2017
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Top Tips for... Performance Management

(For Freshers and Managers)

1. **Set clear expectations** of performance standards within your team and at an individual level, so that if the time comes when you need to manager someone's performance, it doesn't come as a surprise. Ensure your employees know what is expected of them.
2. **Early intervention** is the best and most successful approach to manage performance. Have supportive conversations with your employees as early as possible when you identify that there might be an issue – sometimes simple coaching and guidance can really turn their performance around quickly.
3. **Talk about specific examples of poor performance** that are based on facts and not opinion, when broaching the subject of underperformance with your employee.
4. **Do not over-generalise** the issue or "gloss over" the key areas they need to work on – be specific and seek to gain the employee's agreement that there are performance issues.
5. **Listen to the employee** and determine why they have not been performing – is it a conduct or a capability matter?
6. **Don't be afraid to have difficult conversations** about performance. Performing to the required standard is a fundamental part of everyone's job and can have a detrimental impact on the business if not addressed. As a manager we rely on you to have these supportive, albeit sometimes difficult conversations.
7. **Think about what support you can offer** and only commit to things which you know you can deliver on. Get the message across that creating an action plan allows you both to have a structured plan in place and work together to help the employee reach the performance targets.
8. **Create performance action plans WITH the employee**, rather than "putting them on" a plan. Create the SMART objectives together, ensuring they are truly specific to the individual employee's needs, and encourage the employee to consider what commitments they can make to improve their own performance.
9. **Be consistent and fair, and foster a culture of continuous performance improvement.** If performance management and improvement is part of everyday life in your team, action plans can be viewed as another tool to help support someone to get there rather than a reactive tool.
10. **Seek further advice where necessary**, particularly for more complex cases or ones that require or may benefit from a different approach. HR and/or your line manager will be able to provide support and advice, and talk through possible options with you.

Top Tips for Performance Management	HRG63	V1.1	Official Use Only	09.12.2013	21.08.2014
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Performance Management Procedure (UK)



Document Control			
Document Revisions	Version (V)	Revision Date	Revisions By
Performance Management Procedure	V1	26.02.2018	Bryony Alexander

Introduction

In line with our values, this procedure has been developed to demonstrate our **commitment**, **unity** and **integrity** in creating a culture of continuous improvement and to treat employees in the way we would expect to be treated with regards to performance.

It is our aim to foster a culture of high performance and achievement and supporting you to be the best you can be. We want you to reach your full potential in your role and will encourage you every step of the way to reach the highest standards of performance.

Who does this procedure apply to?

This procedure applies to all employees of Webhelp UK.

Why do we need a Performance Management Procedure?

Webhelp is committed to delivering an outstanding service to its customers and clients. In order to achieve this it is important that we have a robust performance management framework in place for setting and clearly communicating performance standards and expectations, observing and providing feedback, and reviewing your performance either through regular coaching sessions or performance review meetings with your Line Manager.

The Performance Action Plan can be used to either improve performance, maintain performance or develop further within the business.

What does the Performance Management Procedure consist of?

Through coaching and call feedback (if applicable) your Line Manager will identify areas of performance which require improvement. The Line Manager should raise this informally in the first instance, this should be done with the employee through a coaching session and the conversation should be captured on the employees coaching record/notes screen on cascade.

If the reason for poor performance is due to capability then your Line Manager should give you a reasonable period of time to demonstrate the required improvement in performance and continue to provide support through regular coaching, 1 – 1 sessions and call feedback. Clear expectations should be set around what is expected and how you can get there.

Performance Management Procedure	HRPR60	V1	Official Use Only	26/02/2018	26/02/2018
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Performance Management Procedure (UK)

If you haven't demonstrated the required improvement following the PAP you may be invited to a Capability Hearing to discuss your overall performance. See the Conduct/Capability Policy & Procedure for further information on this. The performance management cycle will then continue following this meeting.

If you begin to underperform again after demonstrating you are capable of performing to the required standard this will be managed in line with the Conduct/Capability Policy & Procedure. If throughout the PAP your Line Manager identifies that the performance is due to Conduct rather than Capability this will also be managed in line with this Policy & Procedure and may be investigated. See the Conduct/Capability Policy & Procedure for further information on this.

I'm a Line Manager - How do I set up a Performance Action Plan? (PAP)

To set up a PAP you should select the employee's record on cascade, then choose the Performance – Action Plan screen. After choosing to add a new record you will have the option to choose a stage, the 3 stages of a PAP are –

Formal – If an improvement is required in a specific area

Maintenance – If the employee is achieving a level of performance which needs to be maintained

Development – If the employee is looking to develop within the business or within a specific area of their choice

Please always remember to ask the employee to input their feedback in the employee section and sign off the PAP at each stage.

I'm a Line Manager - How do I set up a Maintenance/Development Plan?

A Maintenance or Development plan can be set up in the same way as Formal performance action plan, the stage chosen in the drop down on Cascade should be maintenance. During a maintenance plan the review period may not need to be weekly however can be reviewed bi-weekly or monthly to ensure maintained performance is sustainable.

Performance Management Procedure	HRPR60	V1	Official Use Only	26/02/2018	26/02/2018
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SharePoint

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Countries > UK, SA & India > Policies & Procedures > People > Performance and Development

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Leave and Working Hours

Onboarding

Performance and Development

Performance Reviews

Recruitment

PERFORMANCE AND DEVELOPMENT

Click on the document title for your policy or procedure. Some policies and procedures are Region wide while some are country specific. Please check this before choosing your policy or procedure. 

Performance Management Review

[Performance Management Review Policy - UK, South Africa and India](#)

[Performance Management Review Procedure - UK, South Africa and India](#)

[Managers Guide to Performance Review - UK, South Africa and India](#)

Learning and Development

[Learning, Training & Professional Membership Policy UK, South Africa and India](#)

[Learning, Training & Professional Membership Procedure](#)



EMPLOYEE NAME	
MANAGER	
DATE	



Home life	Work life / Holidays	Wellbeing / Attendance

KPI Performance	Target	Actual	Achevied
CPC	£31		
FCR	66%		
NPS	20		
PTP Conversion	70%		
Direct Debit	6%		
ACW	100		
HOLD	120		

SMART objective 1
SMART objective 2

Coaching Journey Form

Coachee:

Coach:

Start Of Journey Date:



Coaching Session Date: _____

•What Went Well?

•••••

•How Can You Improve?

•••••



Coaching Session Date: _____

•What Went Well?

•••••

•How Can You Improve?

•••••



Coaching Session Date: _____

•What Went Well?

•••••

•How Can You Improve?

•••••

Viewing: **2015-16 Performance Review**

Performance Management. Managing Poor Performance. When a manager identifies an underperforming employee, they should meet with the employee informally in a 1-1 meeting/coaching session to discuss the reason for under performance and give them a chance to demonstrate the required improvement.

If the employee fails to demonstrate the required improvement in their performance and the reason is found to be capability, a Performance Action Plan should be creating detailing the area for improvement, support to be given and timescale for improvement.

Plan Start Date			
Is the Employee in an Extra Support/Coaching Programme ?		Stage	

Summary of Area Where Improvement/Development is Required

Reason for Plan *			
Improvement/Development is Required			

Detail Here Employees' Past Performance and the Standard Expected by the Organisation

Provide Details of Performance History

Employee Objectives (Set SMART Objectives)

Employee Objectives

Support Offered. (e.g. Training, Call Listening, 1-1 Coaching, Work Shadowing)

Support Offered to the Employee

Commitments from Employee

Commitments details from employee

How Often Will Objectives be Reviewed

Review Frequency

Timescales when improvement in performance is required.

First Review

First Review Employee Feedback

First Review Line Manager Feedback

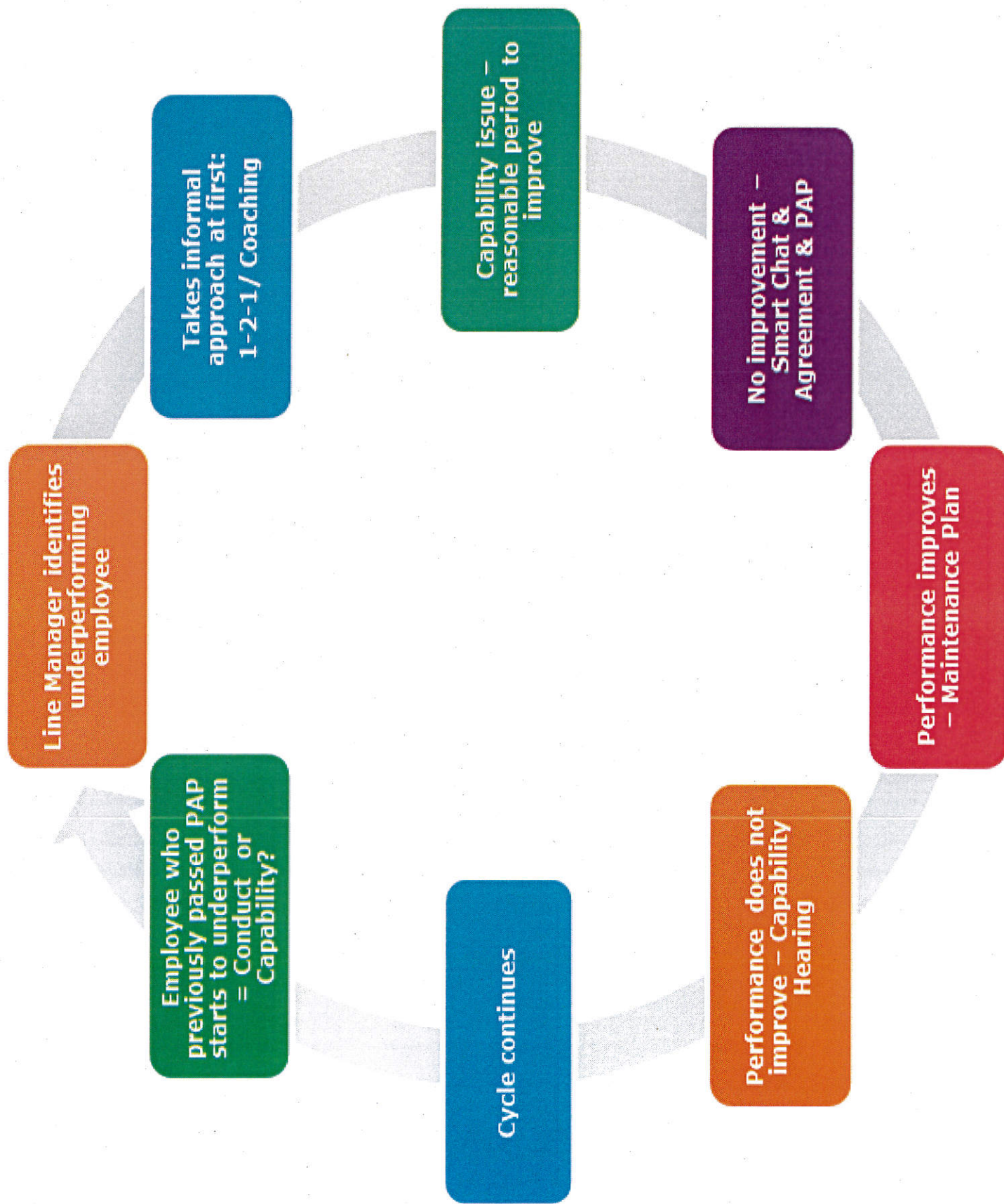
First Review Date

First Employee Review Sign Off

First Line Manager Review Sign Off

Second Review

Second Employee Feedback





MOMENTUM – PERFORMANCE MANAGEMENT

➤ People Services

➤ March 2017

webhelp™



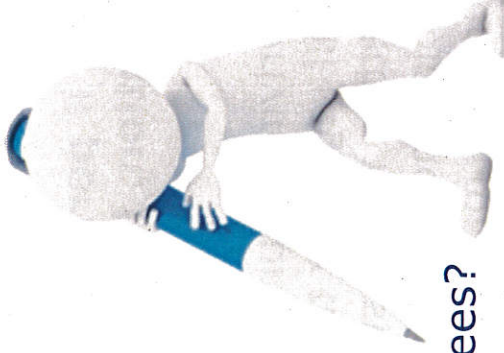
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What is Performance Management?

Activity 1 – Team Discussions:

- What is Performance Management?
- Why do we need to performance manage employees?
- What are the repercussions of not performance managing employees?
- Why might line managers not performance manage employees?
- How is Performance Management currently perceived by employees?

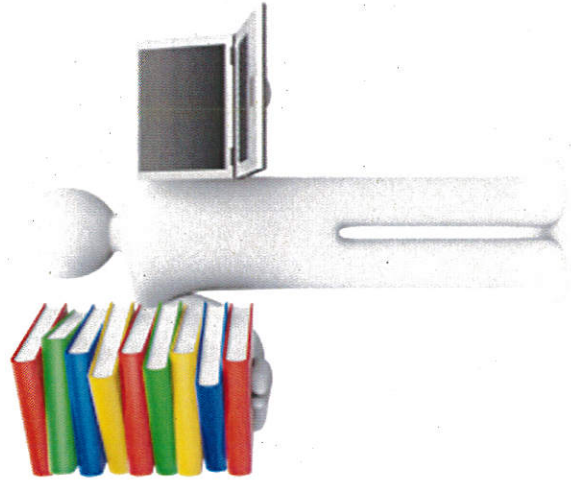
why?



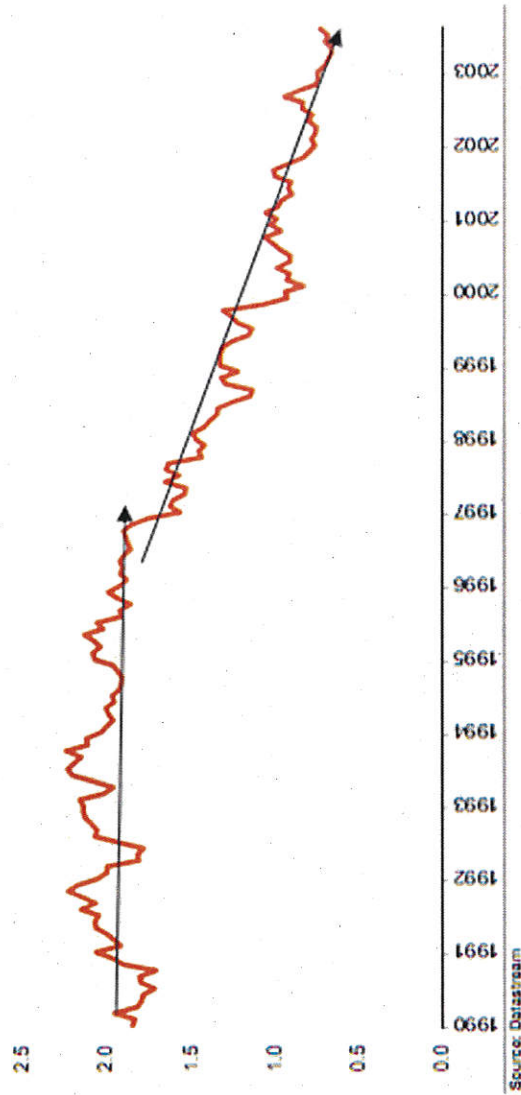
Why do employees underperform ?

Activity 2 – Round the table discussion:

What are the main reasons that employees underperform ?



Japanese banks only began underperforming six years into the crisis (Jap banks/total market)



Conduct or Capability?

There are two main headings that poor performance falls under :

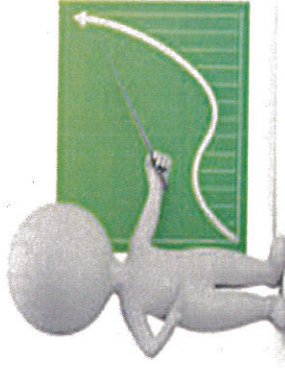
- **Conduct** – Won't (can do, but choose not to)
- **Capability** – Can't (can't do but are trying)

This workshop will focus on **Capability**

For Conduct (For more information on 'Won't do' poor performance issues, you should refer to the Conduct & Capability Policy & Procedure available on the intranet

Top tips when meeting with employees

- **Facts:** Give specific examples of poor performance that are based on facts and not opinion
- **Consent:** Do not over generalise and seek to gain employee agreement that there are performance issues
- **Listen:** Listen to what the employee has to say in terms of why they have not been performing - is it Conduct or Capability?
- **Question:** Ask open questions – don't make any assumptions
- **Specify:** Be specific in outlining what you expect from the employee in terms of their performance setting SMART objectives
- **Support:** Think about what support you can offer the employee
- **Check:** Check the employees' understanding of what is expected of them in their role
- **Engage:** Focus on what can be done to improve performance in the future - be positive and engaging

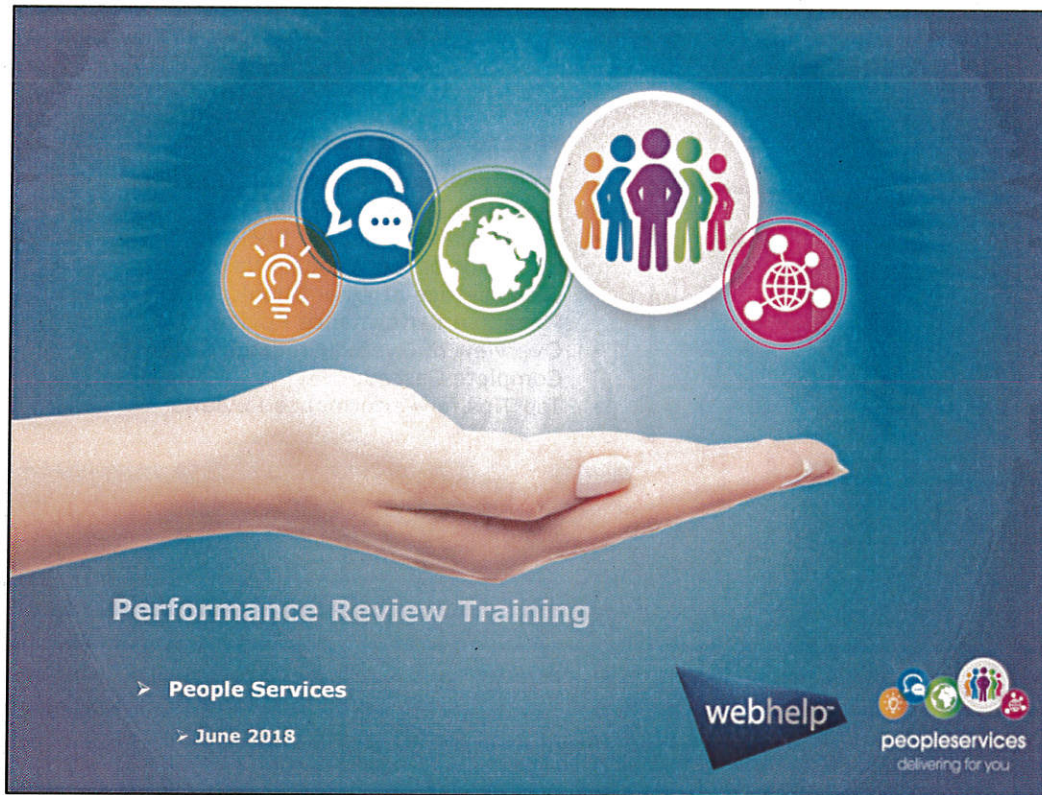


Group Exercise

Activity 5- Group Discussion:

- Who needs to be informed when you are performance managing an employee ?
- What are the potential pitfalls of not following the correct process?
- What are your biggest challenges to Performance Management?





Type of training i.e momentum or pact – verdanda 20, all caps, white font and bold
People Services 14, verdana
Month Year, verdana 12



PERFORMANCE REVIEW – OVERVIEW

Performance Reviews and Competency Frameworks are used by organisations across the world. Webhelp want you to help your employees understand the specific behaviours required of them.

Achieve success in their job role

Prioritise areas for personal development

Align themselves to the Webhelp's strategy

Co-create Webhelp's desired culture



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What is the organisations strategy?

Within your intro to the slide –

- Don't say that this is a 'refresher' say that this will be 'familiar to them'
- Also speak about the benefits of the Performance Reviews to employee & manager

After 'behaviours required of them' introduce the 4 behaviours by saying 'Examples of these 4 behaviours are....'

Performance reviews are a support tool and something that can have great results with the right engagement, these should not be deemed as negative.

When used effectively, Performance Reviews can help your employees reach their high potential, develop capability and reward them appropriately according to their personal contribution. Performance reviews are a support tool and something that can have great results with the right engagement.

should be mindful of this and take time to prepare them for this review.

Questions to ask –

Alongside bullet 1 – Has anyone got any experience of having to change their KRAs partway through the year?



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PERFORMANCE REVIEW – KRA INSIGHT

Team Leaders KRA Scorings across the UK in H2 -

- Development Required - 32%
- Effective - 51%
- Highly Effective - 7%
- Outstanding - 11%



Would you set up a Performance Action Plan if your employee was Development Required?

Out of the **32%** of Team Leaders who were Development Required, 3 had a Performance Action Plan set up in Cascade.

Also **33%** of reviews did not have Line Manager feedback and **33%** of reviews did not have Employee feedback provided.



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Remind that if employee is development required a performance action plan must be set up

We appreciate reviews can be time consuming, however it is really important to evidence why someone scored a certain way.

This insight was looked into and reviewed by PAS team, this then goes to site leads, people partners and the exec team.

Question – Why do you think that is? (this should be read after the Performance Action Review)

They should be put on a Performance Action Plan as soon as they are marked 'Development Required' and it is your responsibility to ensure they aren't Development Required for the next review.



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PERFORMANCE REVIEW – VALUES

INTEGRITY - We work with a positive attitude leading by example; we treat others the way we would expect to be treated.

Background of Employee – Melissa, Team Leader

- Cares about engagement of her team
- Always happy to help
- Could take more accountability in supporting her peers
- Quite often turns a situation into a 'blame culture'
- Has a habit of using 'tell mode'

Your employee Melissa completes their Integrity section of the performance review by entering the following;

I still deal with pay queries for customer service as this is really important as a business to deal with this otherwise the advisors will be demotivated. If the pay is wrong I will always try to put a positive spin on the situation and deal with the problem. I deal with issues in a professional manner and give feedback to the manager, one example of this is, a manager was completing the timesheets incorrectly for overtime so I contacted payroll and made them aware of the situation. I then told the manager to calculate all the information and get the pay back dated.



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POSITIVE INDICATORS

Being bold, being brave & asking for help

Displaying professionalism/role model behaviours/confidentiality at all times

Encouraging people to have self belief and take accountability

Continually self reflecting and encouraging 360 feedback to consistently focus on personal development

Encouraging an open minded culture - Respecting the opinions/beliefs and input of others

Staying true to the voice inside & working in line with our core values - calling out negative behaviour

Holding others and ourselves to account – challenging when 'it's not right'

Being honest, owning up and taking accountability even when it feels difficult

Displaying empathy and sensitivity to others people feelings, views and opinions

NEGATIVE INDICATORS

Not asking for help, hiding behind others & avoiding situations

Unprofessional behaviour/language

Blaming others and avoiding accountability

Avoiding feedback and not acting as a role model when focusing on personal



PERFORMANCE REVIEW VALUES

COMMITMENT - We honour the promises made to colleagues and customers.

Background of Employee – Amanda, Team Leader

- Happy to complete additional tasks when required
- Demonstrates commitment to help others
- Quite often can be slow at completing BAU work
- Makes mistakes on basic tasks

Your employee Amanda completes their commitment section of the performance review by entering the following;

I feel I have displayed commitment by always ensuring I volunteer to help out with actions and giving support to the team where required. I often pick up actions for other leaders such as timesheets even when I am not asked to. I have expressed my interest and passion to develop with the company and have discussed this in 1 2 1's.



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POSITIVE INDICATORS

Setting high standards for ourselves and others
 Actively and positively participating, offering solutions, not problems
 Doing things that need doing without being asked
 Being prepared to manage expectations, and continually re-assessing
 Giving support when required
 Volunteering to help out and following through
 Planning for the short term and long term to meet goals
 Adapting to changing needs whilst keeping focus on the end goal
 Demonstrating resilience and a passion to succeed

NEGATIVE INDICATORS

Making excuses for not delivering
 Sitting on the fence
 Over promising
 Changing or breaking promises
 Not caring if things are not done or fail
 Not caring if people are let down
 Not being prepared or following through



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PERFORMANCE REVIEW – VALUES

UNITY - Working as one team towards a common success takes precedence over personal interest.

Background of Employee – Chris, Team Leader

- Always takes constructive feedback on board
- Takes pride in his work
- Often doesn't ask for help and prefers to work in silo



Your employee Chris completes their Unity section of the performance review by entering the following;

- I ensure full understanding of objectives and strategy across the campaign
- I give input from each party concerned into success plan and strategy
- Ensure I create an environment which allows others to discuss ideas and inputs, and come to agreements on plans as a team
- Driving and developing a team culture to ensure unity and success
- Ensure each person has a personal target and goal, and developing this individually to fit into the team goals and strategies in line with the business and client requirements
- Take on board previous mistakes and development opportunities and learning from these in order to progress and grow both professionally and personally
- Ensure to challenge change in a positive and effective manner, whilst also displaying a flexible approach and understanding to the changes that may take place

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POSITIVE INDICATORS

Communicates vision and values and inspires

Works collaboratively to achieve success and celebrates as a team

Builds relationships across functions and work areas

Supports colleagues across functions to achieve optimum performance together

Welcome's and celebrates diversity and seeks input from expert colleagues

Displays role model behaviour to peers and colleagues

Is open and honest

Engages with the right people at the right time to make the right decisions that are both collaborative and considerate of those affected

Modifies and adapts behaviour to achieve the correct outcomes

NEGATIVE INDICATORS

Working in silos

Not taking responsibility or accountability

Them and us attitude

Pursuing personal not team goals

Isolating others, not sharing information

Sabotaging others' ideas, not supporting colleagues

Not asking for help

Doing something that creates unnecessary work for others



PERFORMANCE REVIEW – VALUES

RECOGNITION - Acknowledgment of individual contribution is essential to ensure our collective success.

Background of Employee – Lucy, Team Leader

- Team player within Operations
- Strives for high team engagement
- Takes too much ownership



Your employee Lucy completes their Unity section of the performance review by entering the following;

- I do things like high 5's and if I hear a great conversation I will call it out with a thumbs up.

- At the beginning of team briefs, start with a positive and thank them for their contribution. I have recognised that this has a domino effect in my team.

- I nominated my colleague Adam for his contribution as site ambassador.

- I have recognised the amazing work my team have put in with their NPS over the past 6 months. I make sure they know how fantastic these results are. I recognised their hard work and effort by bringing in a buffet for the team to enjoy. I also recognised by just telling them how they done a good job at the end of the shift also.

- Rachael had low NPS for 2 months, through coaching and having open conversations about her scores and sharing best practise from the team, she became a high performer for the next few months.

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POSITIVE INDICATORS

Giving constructive feedback

Use multiple platforms to acknowledge great performance and behaviour at a team or individual level

Saying thank you and well done, ensuring its timely and genuine

Telling others about how well someone did (i.e. their Manager)

Ensuring credit is given to the correct person

Taking time to understand how individuals prefer recognition and celebrating success

Recognising improvement as well as top performance.

Use positive recognition as motivation for others

NEGATIVE INDICATORS

Not sharing the credit with others

Dismissing other people's input / views

Not saying thank you

Setting people up to fail

Ignoring people

Favouritism in assigning recognition, reward and tasks



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PERFORMANCE REVIEW – VALUES

WOW – By trying to go beyond their expectations, we continually seek to amaze the people we work with!

Background of Employee – Robert, Team Leader

- They are creative and always come up with good ideas
- Driven and always focuses on end goal
- Focuses on short term rather than long term

Your employee Robert completes their WOW section of the performance review by entering the following;

When the academy was coming back to the site I was keen to put myself into the running – I was volunteered to be the first Team Leader to join this space having had experience previously in the academy which performed well. I wanted to ensure that the academy worked better than last year therefore I focussed on what worked well and what didn't and presented this to the Operations. I came up with a brief structure for the academy for each day and created expectation sessions for each week so all agents were aware where they needed to be to achieve the glide path. I also went into each training group at least once a week to ensure that everyone was comfortable, I sent away for each teams shifts and went in and updated them on the shifts to ensure they were aware what they would be working. Before coming down on the floor I set up all folders for each team, ensured all logins were working and their IT pins were set to the right skilling.

WOW!

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Let me bring it to life

POSITIVE INDICATORS

Going above and beyond the expectations of your role
 Going out of your way to think of new ideas & improve processes
 Challenging the status quo & being prepared to put the effort in to make improvements
 Coming up with solutions rather than identifying problems
 Helping colleagues and sharing best practise outside your business unit
 Demonstrating innovative ways to create an engaged environment
 Taking time to care about the individuals/teams we work with
 Having a strong personal impact – people listen and take action

NEGATIVE INDICATORS

Delivering the minimum requirement
 Putting barriers up
 Complacency
 Using negative language – I can't, I don't, it won't work
 Not team orientated
 Lacking ideas or suggestions for improvement



PERFORMANCE REVIEW – OVERALL GRADING

Overall Grading

As you complete the review and grade an individual's performance over a given period, the following overall grading scale applies:

Development Required

Effective

Highly Effective

Outstanding

Score
0 - 4.99
5 - 7.99
8 - 8.99
9+

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Overall grading should be fully reflective of their overall review and the discussions you had with them, if your overall grading doesn't feel right, you should go back and re-review each section.

Development Required – Employee has failed to achieve the minimum required standard of performance for the role. You must be very specific about what they need to develop and provide on-going coaching and support through a performance action plan.

Effective – Employee has fully performed within the Performance Review and has met the standards of the role. Well done!

Highly Effective - Employee is a consistent high achiever going above and beyond. The quality and effectiveness of their behavioural performance consistently exceeds requirements in most areas. Remember to recognise this.

Outstanding - Employee has achieved an exceptional performance. The quality and effectiveness of their behavioural performance far exceeds requirements in all areas. A true role model who is pushing the boundaries of their role.

PERFORMANCE REVIEW – SUMMARISING PERFORMANCE



Performance Review – Summarising Performance

- Once you have discussed your employee's KRA performance and values, you will then summarise the highlights & challenges from the past 6 months under the 'Line Manager Performance Summary' section.
- Ensure that your employee completes their Performance Summary as it is important that they reflect on their own highlights & challenges.

3. Overall Performance Summary

Line Manager Performance Summary.	
Employee Performance Summary	



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Where is the employee now, where do they want to be and how do they get there?

PERFORMANCE REVIEW – DEVELOPMENT FOCUS & SIGN OFF



peopleservices
developing for you

Performance Review – Sign off of Review

- Both employee and line manager should then sign off the review.
- The Performance Review report will not pick up as 'Complete' if both you and your employee has not entered the date to reflect sign off.
- Please note that should you have anyone who falls into the below categories, this should be recorded using the relevant option along with the date.

By dating this form you are formally agreeing to it's contents and no further changes are allowed.

Employee Sign Off Date

Line Manager Sign Off Date

If there is a valid business reason where you are unable to complete a review for your employee please complete the following.

Reason
Performance Review Not Completed

Long Term Sick
Maternity
Left the Business Suddenly
Career Break
Review Not Required

Date

Save
Cancel



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Where is the employee now, where do they want to be and how do they get there?

Viewing: [REDACTED] > PERFORMANCE REVIEW - NEW Record

Webhelp UK as an organisation believes the continual review of KRA Goals and Company Values is one of the most important foundations that support the achievement of results, continuous improvement and overall organisational success.

Managers should note that a reasonable amount of time should be allocated to the review session and at least 1 hour is likely to be required.

This form is to be used for KRA setting and Half Yearly Performance Reviews of KRAs and Values.

Review Period

H1 Jan - June 2019

Review Date

09/07/2019

1. KRA's

This review should determine how the individual has performed against each objective. Attributing a % score should be as logical a process as possible. E.G. If a goal was to deliver a project comprising 3 equal parts and 2 completed, that may attract a % score of 66%.

Please review your half yearly performance in line with your Key Responsibility Areas.

KRA1. What do I have to do? What does success look like?

IMPROVE PEOPLE HAPPINESS

- a) Roadshows / pop-up days: Hosting at least 3 People Pop up days (World Mental Health, Inclusion Week, People Services/WebHEALTH launch or refresh on sites to name a few), responding to trends and working to the calendar of events
- b) Diversity & inclusion: Promote the calendar of events, tailoring to each individual site and demographic and demand when necessary and working in line with the people plan and roadmap for Diversity & Inclusion (led by Cathy SA)
- c) Leadership listening: Driving leaders to demonstrate active listening and respond to employee feedback whether this is through engagement surveys or ad-hoc listening sessions. Build on current relationships with management across sites and fully understand how we can support and enhance the overall people experience through encouraging active listening to achieve stronger communication and enhance the employee/employer relationship
- d) 30 days happiness: Promote the WebHEALTH Global 30 days of Happiness across site actively taking part and driving participation on your sites to allow them the opportunity to showcase the great work
- e) WebHEALTH: Support any initiatives as and when required, ensure the WebHEALTH methodology is promoted across sites
- f) Lunch and Learns: Facilitating at least 1 Mental Health/Mindfulness lunch and learn session per month and seek feedback, using this to improve and take action as well as using the insights and successes to share with operational teams

KRA1. How will I know when I get there ?

KRA1 Timescales

KRA1 Weighting %

30

* During H1 I have run 2 pop up days and a LEAD session. 1 of the pop up days was for the promotion of PAS explaining all the option routes and sharing who our team are and what their roles are. This went down really well people were interested to know who they speak to when they ring PAS. I completed a Mental Health pop up for world mental health day sharing all the detail that the PAS team pulled together but also relaunching the be your own kind of beautiful mirror and the Webhelp challenge boards. We also described the launch of the WAP's which went down really well. I have also completed a 2nd LEAD session in Cardiff where we take a group of 8/10 agents through a development programme. I spent 4 hours talking to them about the people services team the role of Senior People advisor and what a day to day role of a HRM would look like.

* There has been an opportunity to work of the Diversity and Inclusion plan but hoping to have more involvement within H2.

KRA1 Employee Feedback

* I have taken part in a leadership listening session with Andy Webster we met with 12 agents from both campaigns asking for their feedback on what they would like to see change. Taking away key themes and insights. I also completed an employee voice drop in session 12 agents attended and gave their opinions on progression, support for TLS and OPS, development, engagement and recognition.

* 30 Days of happiness didn't land as well this time as it did last summer. I have spoken to the operation though and we are thinking of doing it again in September.

* I am an open advocate for WebHEALTH and actively try and take part in all site activities. I have requested relevant POS for WebHEALTH to promote across site. I recently took part in the cycle challenge and love it when the masseuses are on site (haha).

* I have managed to complete 8 lunch and learn sessions during H1. 2 x Mindfulness for stress awareness month 2 x Happiness for international day of happiness and 4 x mental health. There is still a keen desire for these across Cardiff. I am hoping to continue to develop these sessions and am working with Chris to complete a Pride lunch and learn for Cardiff Pride in August.

KRA 1 Line Manager feedback

Despite change projects and despite [REDACTED] feeling like she had not as much opportunity to engage with front line through training or pop-ups like lunch and learns as she would like, she has delivered on volumes, exceeding on expectations, especially compared to other colleagues. [REDACTED] really enjoys getting involved in engagement activities. [REDACTED] sees opportunity with re-visiting ambassadors. [REDACTED] still got involved in the LEAD initiatives and MH awareness week which has been great to take time. [REDACTED] is always promoting health and wellbeing and ensuring people's priority and engages with them. What a fantastic delivery in this front with all thing considered, well done.

KRA1 score %

87

KRA1 Weighted Score %

26.1

d) Growth: Supporting the business with new business and ramp as and when required with regards to new business or redeployments ensuring the people experience

KRA 3 Timescales

KRA 3 Weighting %

30

* This Quarter has been about change for Cardiff. Beginning of the year seen us having to make 2 people redundant from SDG then the remaining 70 agents being redeployed from SDG to Voda. The Sainsbury's change work was very different from anything I had done before as it was a large collective consultation but I felt with the support given from all areas of the business we have held meaningful consultations whilst also stretching the Business with the extension of the Shell Campaign.

KRA 3 Employee Feedback

* As stated before I have participated in the Lead session. This session I build myself last quarter however this time I build some of my Uni course work in allowing me to talk in more detail around protected characteristics, employment tribunals and ACAS. I also use these session as succession plans to see who I think maybe ready to move into a bigger role. From last Years Lead session we successfully moved an agent into recruitment. I also actively take part in the recognition awards keeping an eye for future talent ensuring I constantly feedback on what I see, hear and feel across site.

* I have supported the Team managers this quarter by completing refresher Performance management session but also completing drop in sessions for PAPS. there was lots of confusion of how we should use a PAP and the process behind this. We are also actively support the some of the lower performers across site using performance management .

* We haven't taken on any new employees since November 2018 however we did manage to secure 70 agent roles in Vodafone when the announcement of SDG transition to Sainsbury's was no longer secure. This process wasn't straight forward but engaging the right stakeholders seen us support 70 agents instead of making them redundant.

KRA 3 Line Manager feedback

████ supported the close of SD campaign and the in last quarter, Sainsbury's's going. █████ has been fantastic and really proactive with the consultation process. █████ focusses around engagement and very aware of the emotional impact through any situations and change which has allowed comms to be smooth with colleagues knowing clear escalation routes. █████ kept the flames out on the day to day activity and we had little escalation as a result. The LEAD initiative again helps talent management across sites. █████ works close with business leads and anticipates their needs for progression and will link people in with each other to support their career paths.

KRA 3 Score %

85

KRA 3 Weighted Score %

25.5

KRA 4.What do I have to do? What does success look like?

INCREASE PROFITABILITY

KRA 4. How will I know when I get there ?

a) Absence Management: Work closely with line managers to ensure full understanding of process and staying close to the data capture and information stored on Cascade. Focus on priority cases with the aim of driving down overall LTS numbers and share good practice with absence management that can support short and long term absence as well as preventative methods

b) Attrition: Attend weekly calls in order to understand positive attrition trends and how we can best support our people, including PACT retention in our training offerings

c) Reporting and efficiencies: Follow up on any reports sent to site by the PAS team ensuring we provide the right level of support. Share the monthly report with our Heads of's to ensure full understanding of trends and themes. Identify any possible gaps in reporting and work to close those

d) Cost: Ensuring cost is kept low and spent wisely such as Harpers contact, Occupational Health referrals, Acas COT3, settlements and Employment Tribunals. Raising understanding and awareness of budgets and spend.

KRA 4 Timescales

KRA 4 Weighting %

20

* I have tried to keep a strong focus on Absence management during H1. I attend the absence game weekly ensuring that the correct process is being followed to allow us to support any colleague who is absent from our business. I also ensure that PAS has been involved with and capability cases across site. I recently linked with PAS to ensure any Oc health referrals I am copied into so I can see who is going through the process on our site. I have supported with 18 welfare's during H1 mostly for agents who are suffering with MH or on LTS.

* I attend all weekly WIG meetings ensuring that we are actively working on attrition and culture. If something feels off pace I will openly address this with the operation. I also support with all engagement activities across site to ensure that the operation sees a presence from support but also to give me an opportunity to speak to agents in an informal space.

KRA 4 Employee Feedback

* I ensure that all my reporting is up to date and share all relevant knowledge with key stake holders. I used to have monthly meetings when there was more than 1 stakeholder to discuss from a site perspective rather than a campaign perspective. I now link with just Voda and they share the information with anyone they think is relevant. I also link the leavers report into the WIG commitments to ensure all key stakeholders know what is on the radar.

* During H1 I managed to settle a ET through ACAS this saved us a lot of time and money and the solicitor broke down the cost of an actual ET which was quite horrifying to see I shared this information with the wider team to raise awareness of how much these kinds of cases actually cost. I have been asked to be linked into all OC health referrals giving me some exposure into who we are referring and often PAS link with me before hand to see if this is a relevant referral.

KRA 4. Line Manager Feedback

████ works closely with PAS to ensure she is close to reporting and likes to know who should be on her radar. Getting involved in welfares and understanding MH to help managers understand more and deepened their knowledge and confidence in order to reduce the volumes and durations of LTS. I can't believe █████ has still managed to support in 18 welfares despite supporting all the site change. █████ is excited to embed the new Absence & Wellbeing policy/procedure and WAPs.

Unity	Highly Effective		
Unity Employee Feedback	I think the biggest success with unity during H1 was our 2 days team meeting and weekly 121 calls on the ways of working. I thoroughly enjoyed getting to work closely with Stacey as our roles don't always allow us to overlap. It was great seeing how everyone worked together sharing ideas and experiences ensuring that we gave each time to describe their ideas and why they thought it was important before working together to pull together a frame work which will continue to grow in our business. ████ is a natural team player and thrives off group activities- she also spurs others on and is really motivating and inspiring to her peers and PAS. █████ fits in well within her ops team being seen as very much part of their team, being asked to be involved in activity days and initiatives which demonstrates their recognition of her value. Sarah worked well with the team when she was up for ways of working and especially enjoyed working with █████. Moving forward as the team expand, I am excited to see █████'s role within the team as she is naturally a nurturing person.		
Unity Feedback Line Manager			
Unity Score	7.5	Unity Weighted Score	1.5
Recognition	Highly Effective		
Recognition Employee Feedback	I believe recognition is something that is really important within our day to day role. I have ensured this year that I have nominated a Member of the people services team every month for a star award. I have nominated Emma for her hard work and commitment in covering Meg when she was on Leave. Megan for all her support with the Sainsbury's campaign, Chris for supporting with the MHFA and his growth within his role over the last 6 months and Cheryl for her Continuous support and always being my sounds board keeping me on track. ████ recognises the value of giving feedback and from day 1, she would be proactive in recognising and being grateful and humble for the opportunities presented to her. This is fantastic as it means she already has one of her values in her DNA! █████ appreciates feedback herself also and looks for feedback to improve herself and also to check in with her capability which is great. █████ out of all SPAs, really makes an effort to recognise others through Star awards. part of saah'/s ethos and wellbeing		
Recognition Feedback Line Manager			
Recognition Score	7.5	Recognition Weighted Score	1.5
WOW	Highly Effective		
WOW Employee Feedback	This quarter I have won a monthly star awards and a quarterly award. This was a real big achievement to be recognised for my hard work. I have also been recognised 4 times across site for the day to day support that I have given people. This feedback I keep on my desk to balance me if I am having a bad day as its because of these people why I love my role. ████ has been fantastic to deliver on the Sains change, 18 welfares, countless training and pop ups and 10 plus lunch and learns as well as supporting BAU. It was fantastic to see that █████ one a quarterly award which is no surprise she did. Congrats to getting your ticket to the annual ball! Well deserved!		
WOW Feedback Line Manager			
WOW Score	7.5	WOW Weighted Score	1.5

3. Overall Performance Summary

Line Manager Performance Summary.

████ is a fantastic addition to the team and just over 1 year on, I can't believe that we once had a team without her! It is a pleasure to have █████ in the team and she is a joy to work with. █████'s confidence has grown from strength to strength and it has been a privilege to watch her flourish and be a part of it. █████ enjoys the personal touch, is one of life's true empath's and wears her heart on her sleeve. This drives her to be honest and be a role model and she has found a good balance on working close with the people but managing clearer expectations to ensure she isn't drawn into too much or adopting the counsellor role as this drains her fast and also sucks up a lot of time so it's great there has been a good balance achieved and with Sains being so demanding it's maybe helped shape that.

████'s personal touch means she knows almost everyone on site which means she is trusted and recognised as someone people can trust. As a result, we have had no exec complaints for more than 6 months and this is testament to █████ having things under control and employees knowing sensitive issues should go to her.

████'s delivery on the collective consultation for Sainsbury's has been fantastic and while at times, it was demanding and tiring, █████'s confidence in the process grew and led on BAU on the ground competently and well to the point where if I asked for an update on anything, █████ would already have done it or thought about it.

Here's to another productive and successful 6 months █████, thank you for your hard work, time, sacrifice and contribution!

I am really pleased with my review. The last 6 months has been a real stretch for me however I feel I have embraced it and feel happy to have come through it stronger and more knowledgeable. I am really grateful to be a part of the people services team and the continuous support I get from Luana.

Employee Performance Summary

I am looking forward to what the next 6 months will hold and to see how we can improve the culture in █████.

Thank you.