

Options & Routes

If you need any help or advice on any issues that may arise, these are the options available for you.



Support Available

We are here to help. You can get in touch by using one of the following options



Internally on x4911, Option 5 to speak to one of our people



Externally on 0330 123 3917



Via email: people.advisoryteam@uk.webhelp.com



Via Skype: [people.advisoryteam@uk.webhelp.com](https://www.skype.com/people/people.advisoryteam@uk.webhelp.com)

Performance Review Framework

General FAQs

How often should performance discussions happen?

We recommend regular informal conversations about performance should happen every 4 to 6 weeks as a minimum with a formal documented review every 6 months. The onus is on both employee and line manager to make these the informal conversations happen.

Can I record informal conversations anywhere or is there a template to use?

There is no specific template for this, but any relevant information about performance or progress towards half-yearly objectives should be recorded in Cascade for the relevant review period. This screen is called "Performance Review" and the selectable review periods will be called "H1 – Jan – June 2014" or "H2 – July – Dec 2014".

What is the deadline for completing half-yearly reviews?

Reviews should be completed within the month following the end of the review period. For example, when reviewing performance of January – June period, all reviews should be complete by 31st July, and for the July – December review period, all reviews should be complete by 31st January.

Is the old Quarterly Review information still available for me to view?

Yes, on cascade you can still view past Quarterly Review information by selecting the drop down and selecting specific quarter.

What are the timescales for bonus payments?

The expectation is that all bonus schemes will pay out every 6 months following completion of the half-yearly reviews. However, for operational bonus schemes there may be scope for the current frequency of payments (either monthly or quarterly) to remain in place, and reconcile in January/July as necessary according to formal performance review outcomes.

I have an employee who has just newly joined the company/started in a new role - when will their first review be expected to take place?

A new employee or someone who is new into a role (including temporary and seconded employees) requiring a performance review must have been in this role for a minimum period of a month before a formal performance review will be expected. If they have been in role for less than one month, you will not need to conduct a formal review until the next future round.

For example, Joe Bloggs joins the company in a support role on 5th June 2014, he will have less than one month to go before the end of the Half Year 1 review period (January to June) and therefore will not require a formal review during July - his next review will be for the July - December performance period, to take place in January 2015. However, Jane Doe who started in a relevant role on 15th May 2014 will have been in role for more than one month by the end of the relevant review period, so you will have to do a review with her in July.

Performance Review Framework General FAQ's	HRF49	V2	Official Use Only	18.02.2013	14.06.2018
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One of my team is moving to a new role/new line manager who should conduct the half yearly review?

For submission purposes the Line Manager who is responsible for the employee on the last working day of the half will be the expected to complete.

I have an employee who will be leaving the company soon after the performance period - do I still have to complete their formal review of this period?

If your employee is due to leave within the first month following the end of the performance period, then no you do not have to complete their formal performance review. If they are due to leave after one month, then yes you will still be expected to complete their formal half yearly review.

For example, Joe Bloggs decides to leave the business and his last day is 28th July 2014. You will not have to do a review for him. Jane Doe leaves the business on 3rd August - you will have to do a review for her as more than one month has passed since the end of the performance period.

If I have annual KRA's how do I assess them at the half year review?

You should assess the % completion of what you expected to be achieved in that half. Although overall KRA's might span over a full year they should still have milestones or glide paths for an individual to be assessed against to ensure they are on track.

How much evidence do I need to provide as an appraisee?

The onus is on the appraisee to come equipped to their review prepared, they should have completed cascade by the timescales set and given some thought to their performance levels and gathered evidence in each KRA and value.

Evidence can come in many forms and can consist of copies of minutes, agendas from meetings, a copy of an email, a presentation you prepared, feedback you solicited or can be as simple as being able to discuss and remind your line manager of a particular time you believe you demonstrated a particular value. Effective evidence does not have to be a large bundle of paperwork.

How do I assess at a half yearly review?

You should assess the 4-6 KRA's by performance vs. KRA expectations. A percentage of how much of that KRA's the appraisee achieved should be entered into Cascade. The employee should have completed the employee feedback section prior to your review meeting.

You should also review the appraisee against each of the 5 Values using the 'Living our Values' section of Performance Review Framework and Behavioural Standards and select one of the

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levels from the drop down box. Again the employee should have completed the employee feedback prior to your review meeting.

The scores created from both of these areas will pull through and provide you with an overall grade at the bottom of the screen. The line manager needs to complete their feedback on each KRA and Value.

Why do my completed reviews not appear on the completion rate updates via Qlik View?

For a review to be completed and for it to pull through into the Qlik View completion document both parties must have signed off.

Definitions:

Appraisee – The employee having the review conducted on their performance.

Appraiser – The line manager conducting the review on one of their team members.

If you have any questions about the Half Yearly Performance Review processes please direct these to your local HR Team who will be happy to clarify for you.

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Sarah Chislett – Performance Management witness statement

During the past 6 months I have progressed within the business and this has led to me taking on the responsibility of managing a team.

The team are new to the role and as a result I have had to ensure that they have a positive on boarding experience and that they have the training required to become proficient in their role. Sarah has fully supported me during this time, particularly in respect to their performance management process. This process can be daunting especially as I haven't managed a team before but with her help I feel as though the process was managed effectively allowing the performance of my team to grow.

She is always approachable, extremely knowledgeable and is ethically professional at all times. I now have a much broader understanding of Performance Management and have become very confident in managing my team as a result of Sarah's support.

Claire Williams

Senior Recruitment Consultant

A handwritten signature in blue ink, appearing to read 'Claire', is written below the name and title. The signature is fluid and cursive.

Viewing: (249606) Sarah Chislett

Date PDP

Completed

Part 1 - Personal Analysis

Strengths

Areas for
Further
DevelopmentHow do I know
this is an area
for
development?**Part 2 - Personal Objectives**Short-Term
Goals (next 12
months)Medium-Term
Goals (2-3
years)Longer-Term
Goals beyond 3
years)**Part 3 - Setting Goals****Goal 1.**1. What do I
want to work
on?

1. Relationships

1. What will
success look
like and how
will I know I
have
succeeded?

1. Education

1. Experience

1. What
support do I
need? More
detail

1. Timescales

1. Quarterly
Progress
Update**Goal 2.**2. What do I
want to work
on?

2. Relationship

2. What will
success look
like and how
will I know I
have
succeeded?

2. Education

2. Experience

2. What
support do I
need? More
Detail

2. Timescales

2. Quarterly
Progress
Update

Goal 3.

3. What do I
want to work
on?

3. Relationship

3. What will
success look
like and how
will I know I
have
succeeded?

3. Education

3. Experience

3. What
support do I
need? More
Detail

3. Timescales

3. Quarterly
Progress
Update

Aileen Stewart - 360 Feedback

Hi, Sarah, when you submit this form, the owner will be able to see your name and email address.

* Required

1. The ability to communicate effectively and influence to convince others of their way of thinking. *

Not very effective 1 2 3 4 5 Extremely effective

☐ ☐ ☐ ☐ ☐

2. The ability to take responsibility for tasks and actions, knowing when discussions need to turn to actions and results. *

Not very effective 1 2 3 4 5 Extremely effective

☐ ☐ ☐ ☐ ☐

3. The ability to follow up with matters to evaluate the success of previous actions and discussions.

Not very effective 1 2 3 4 5 Extremely effective

☐ ☐ ☐ ☐ ☐

4. The ability to be self-aware of themselves and the impact they can have on other people. *

Not very effective 1 2 3 4 5 Extremely effective

☐ ☐ ☐ ☐ ☐

5. The ability to successfully plan and prioritise workload to deliver to expectations. *

Not very effective 1 2 3 4 5 Extremely effective

6. Identify 2 key strengths and explain how have you observed them being demonstrated in the workplace? *

Enter your answer

7. Identify 2 areas you believe Aileen could develop to make them more effective within their role? *

Enter your answer

8. If you have any other general comments, I would appreciate you noting them below.

Enter your answer

Submit

This content has been created by the owner of the form. The data you submit will be sent to the form owner. Never give out your password.

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Contributing to the improvement of Individual and Organisational Performance 2

When considering how to support anyone through Performance Management it will very often vary. Coaching is often something you will need to provide to help support someone either through a process or with a process. The CIPD state that coaching can be an effective approach to developing employees (CIPD, 2019). Some people will be looking for information such as what kind of Performance Action Plan they should be on whether its formal, Maintenance or Development. They may be looking for advice around someone's performance they may like to discuss Statistics and to describe considerations as to whether someone's performance is a blip or if there is a trend and they need support with their performance.

For employees there are certain things they need from an organisation, Hertzberg two factor theory covers these off under Hygiene factors such as a salary, job security and good working conditions alongside motivator factors such as recognition, a sense of achievement and responsibilities at work with combining both of these there is a good chance an employee will be motivated to do their role and gain job satisfaction (Mindtools.com, n.d.)

Alderfer adopted an approach called the ERG approach, this was similar to Maslow's approach but in 3 steps rather than 5. Alderfer stated that employees have existence needs which are psychological and material relatedness needs such as meaningful relationships, social environments and affiliation and growth needs such as self-esteem and self-actualisation. Alderfer stated that as each need is met there is a desire to fulfil another need (Study.com, n.d.).

As stated previously all team leaders would be taken through Performance Management training and would be given the tools needed to be able to manage a team of people, however for agents their initial training would take place in the first 3 weeks of an employee joining Webhelp. The induction training will go through what is expected of them in their roles, the targets they need to achieve and how they can achieve them. They will go through a series of training including classroom training, virtual online eLearning and mini assessments centres to ensure they have had adequate training before going live and taking calls. They will also be given a copy of the Job description (Appendix 16) they have been hired to do so they know exactly what their role is and will have had the relevant training.

McClelland had a theory based on achievement which had four arousal-based and socially developed motives there were achievement, power, affiliative and avoidance. For most employees they tend to feel all if not most of these motives during our training process which is why we use the employee scorecard to assess where each individual is within the training process and how we can support them going forward within their Worklife cycle understanding an employee's behaviour is key when managing a group of individuals (Mindtools.com, n.d.).

Often all Performance Objectives link to the larger Business objectives ensuring that at all levels we are working on the same thing albeit the higher up in the organisation the more input they would have into delivering these objectives. In Webhelp performance management is linked to reward so no matter what level you work at there is a financial

incentive to ensuring you perform at the highest standard. For agents if they are performing to the relevant standard they achieve a monthly bonus of up to £250 (Appendix 17). Team leaders will then achieve their bonus if they have completed all the relevant framework to qualify such as ensuring they have completed all their 121's with their agents and listened to at least 30 calls per month. Support staff are on a yearly bonus scheme and will achieve a 10% bonus based on their reviews. So Financially it makes good business sense for all employees to perform well within Webhelp.

Performance management is obviously a key part within any organisation due to the severity of underperforming employees. Webhelp is an outsourcing business so for us financially it is imperative that everyone is achieving optimum performance as we need to be as cost effective as possible to deliver for our clients.

All performance management detail should be stored on employee's cascade as this allows us to review and update it as and when is necessary. This is important as Outsourcing is a fast paced environment and if we were to move around team leaders to support different campaigns any team leader should be able to come in and support an agent's performance so all the relevant detail will be there for them (Appendix 18)

We have recently been tasked with managing the bottom quintile of agents and their performance, these agents have shown that they are more than capable of completing a role but have not been improving their stats off the back of their coaching and 121 session. The client has challenged Webhelp to either improve performance or remove these agents from the Business. We have since had to put Operations manager in charge of these group of individuals to ensure we are doing everything needed to get these employees to where they need to be. I have worked closely with this Operation manager and with the PAS team to be able to look at our process where each individual is and how we can get them to improve their performance or manage them out of the business in a fair way. We have looked to adapt the Performance Action Plan on a short-term scale as we know this is a conduct not a capability issue and give these agents the opportunity to retain their roles rather than managing them through a conduct and capability process. This process had been ongoing for the last 8 weeks during which time out of a group of 8 individuals whose performance needed to improve we have only had to dismiss 1 agent, 1 agent moved to another company and 6 agents are now performing to the standard required (Appendix 19)

Customer Recovery Team Secondments Shop Direct -Cardiff

Are you looking for a new challenge? Due to continued business success and growth in Webhelp UK, we are currently recruiting into our CRT team within the Cardiff contact Centre.

Your new role

This is a fantastic opportunity for you to work on one of our high profile campaigns and be a part of our continued success and growth.

As an Inbound Customer Recovery Advisor you will have great conversations with existing customers, building rapport, questioning in order to gain an understanding of the customers' needs and lifestyle. By engaging in conversation you will use your influencing and first class product knowledge to provide a suitable tailored solution to ensure customer sales and retention.

If you've got a positive "can do" attitude and you are motivated by the challenge of achieving great results, then working with Webhelp UK is the place for you.

What you'll need to succeed

- Previous experience of working in a customer driven environment
- A proven track record of working to and exceeding targets
- Excellent communication and rapport building skills are paramount
- Attention to detail
- The ability to identify a problem and provide a solution

What you need to do now?

To apply for this vacancy log onto the Webhelp UK careers page (www.webhelpukcareers.com) reference number 03711. You must have your team manager support, no live disciplinary sanctions and have successfully passed the on-boarding process.

Closing date 10th September 2016

Please see below how the **INCREASED** bonus payments apply to your core three metrics, FCR, TNPS & NBA
Great news! Your annual Bonus for FCR, TNPS and NBA has increased from £2K to £3.75K OTE.

FCR		TNPS		NBA	
Target	KPI Value	Target	KPI Value	Target	KPI Value
75.0%	£125	46.0%	£125	5	£256
73.0%	£104.17	44.0%	£104.17	4	£201
71.0%	£83.33	42.0%	£83.33	3	£146
70.0%	£41.67	40.0%	£41.67	2	£83
<70.00%	£0.00	<40.00%	£0.00	1	£28
				0	£0.00
















For every NBA fulfilled sale above 3 you will be paid £55 each.

Improved Bonus Scheme Details



David achieves 71% FCR, 44.0% TNPS, and 3 NBA this month
FCR KPI Value + TNPS KPI Value + Fulfilled Volume = Bonus Payment
 £83.33 + £104.17 + £146 = £333.50



Re: Smart chats,

Sarah Chislett

Wed 31/10/2018 10:12

Michael Aaronson ✕

Hi Mike,

I think you have done a really good job with these smart chats. It is great to see how your going to help and support these colleagues.

Ensure if you have any make any commitments to anyone you adhere to them as this will help to build your relationships.

If anyone is off with absence and you have concerns around timescales feel free to complete a welfare also as this is extra support for them.

Thanks

Sarah

Sarah Chislett
Senior People Advisor

1510564404452
_PastedImage
Hodge House
114-116 St Mary's Street,
Cardiff,
CF101DY.

07392273707

sarah.chislett@uk.weghelo.com

From: Michael Aaronson
Sent: 26 October 2018 18:55
To: Sarah Chislett
Subject: Smart chats,

There are the smart chats that have written.

Kyle Clayton

S -Since Kyle's previous smart chat for lateness on the 20/08/2018 - has had 2 further instances of late 29/09/2018 - 21/10/2018, we need to see an immediate an sustained improvement of this with no further instances in 3 months and no more than 1 instance in 6 months.

Re: PAP

Sarah Chislett

Thu 14/03/2019 19:53

Michael Aaronson ✉

Hey mike,

I can't send it tonight as I don't have my computer but can send it tomorrow morning?
I'm happy to chat it through with you tmrw?

Thanks

Sarah

Get Outlook for iOS

From: Michael Aaronson <michael.aaronson@uk.webhelp.com>

Sent: Thursday, March 14, 2019 7:06 pm

To: Sarah Chislett

Subject: PAP

Hi Sarah, hope all is well,

Chris has asked everyone to place the advisors on PAP that had less than £30.00 CPC last month. As I am still a little unsure on exactly which PAP to place people on may I have the material that we went through in the training, I only have tomorrow to do all 6 of the plans and just feel rushed.

Many thanks

Mike

Re: Performance Management

Sarah Chislett

Mon 10/06/2019 10:39

Carl Bingham; Luana Kemp ✉

Hi Carl,

I cant say they could be effective from today as I don't know their shift pattern and they may not be in. All these agents know that there is an issue with their performance so we can definitely start the PAP process on their next shift.

I would say 2 weeks would be minimum if they are only working working 3 days per week plus we would need to take into account any Leave they have booked.

I will ask Lynsey to complete a template with their shifts/Holidays and where they currently are within the process to give us some clear guides to work with.

Thanks

Sarah

Sarah Chislett
Senior People Advisor



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sarah.chislett@wspnhs.uk

From: Carl Bingham
Sent: 10 June 2019 10:35
To: Sarah Chislett
Cc: Luana Kemp
Subject: RE: Performance Management

Hi Sarah,

Thanks for the call this morning and email. I will contact Jodie as discussed. Could the three Agents be placed on the performance management process from today? Do you feel that 2 weekly reviews are the minimum time due to the fact that all 3 Agents work part time?

Thanks

Re: Performance Management

To: Carl Bingham <carl.bingham@uk.webhelp.com>
Cc: Luana Kemp <luana.kemp@uk.webhelp.com>
Subject: Performance Management

Hi Carl,

Following our conversation this morning, I just wanted to confirm that my initial concerns was due to not following one of the 5 legal reasons to dismiss someone. These agents are covered off by certain Protected Characteristics and are also part time works so I would worry about the case for discrimination.

I spoke with Hayley, Luke and Lynsey to confirm that I am happy to support them through an escalated process but I felt that taking someone who was on no formal warning to an investigation and potentially dismissing them would be rather unfair and this would be inconsistent with the rest of the site.

My advice would be to manage these 3 agents through Performance Management but an escalated PAP process which potentially could be reviewing them every 2 weeks instead of 4. I would advise that this is facilitated through PAS to ensure we are documenting all the support we are offering, should there be any further questions regarding this in the future.

Hope this helps, please let me know if I can support with anything on the ground.

Thanks

Sarah

Sarah Chislett
Senior People Advisor

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ge

Contributing to the improvement of Individual and Organisational Performance 3

When reviewing performance at Webhelp we start this process right at the beginning of an Employees work life cycle. During training we complete what is known as a scorecard call where the training managers works with HR, Recruitment and the Head of Operations to understand how the employee is getting along in training (Appendix 20). This gives us a good indicator of the employee and their performance. We look at their attendance, their behaviours and how they have demonstrated the values during training. This call also allows us to focus on attrition and to understand any key themes as to why we have leavers during training.

Last summer we had a peak in attrition during the training period and as an organisation we used the franklin Covey Methodology of 4DX which allowed us to focus on 0-90 days attrition (Franklincovey.com, n.d.). At its worst Webhelp had a 200% attrition within a 1-year period which obviously put massive pressures on the business and that's where the change started right from the recruitment stage.

Recruitment was reviewed and the induction material was changed, the operation started going into induction groups and giving high level detail of what it was like to work in a call centre. We also launched a refer a friend, scheme allowing valid employees the opportunity to be able to get someone who they thought was reliable a job and if they passed their probation, they would be given a £300 bonus (Appendix 21)

Whilst considering Webhelp and performance management the approach is consistent although the process does vary slightly depending on an employee's role. The Webhelp vision and mission statement 'We aim to be the best at engineering our customer experience' says it all. It is inclusive of all work levels and is built into our values allowing each employee to portray the desired behaviours to be effective whilst at work. Although agents are not measured the same as the support staff, they objectives set all align to our people which is the foundations of what we do and who we are (Appendix 22)

When considering High performing working and how Performance Management aligns, Webhelp does a good job of ensuring everyone has the correct knowledge and support needed to be effective in work. Gov published a report stating that there is a considerable body of evidence showing that wider adoption of High-Performance Work Practices would improve firm performance and contribute to growth (Assets.publishing.service.gov.uk, 2012). Training is a fundamental part of any role and the robust procedure that's adapted in Webhelp ensures no one at any work level is set up to fail. After every training session that is completed there is a training survey sent out to find out what went well and what we could do to improve the process in the future ensuring there is always continuous feedback (Appendix 23). Mindtools. Com (n.d) say that giving feedback is a skill that takes time to get right, this is like most things which is why we encourage the continuous development and feedback within Webhelp.

Commitment is one of Webhelps values and it is described as being able to deliver on time, being realistic with comments without sacrificing team work ethic, having consideration for the wider team with the business needs and committing to your team (Appendix 24). At

Webhelp the team is not build up of agents, team leaders, Operational staff or support staff it is build-up of employees who all work for one organisation with a goal of achieving the companies' vision. Each employee owns their own development they are all given the tools needed to be able to develop and sustain their performance within the organisation but their commitment and drive to want to achieve and be successful within that organisation is down to them.

Having recently completed a focus group with individuals from all work levels there were some themes, some of which meant that they felt performance management was targeted, some felt the targets were too high others felt it was a fair and consistent process, some Team Leaders asked for support to ensure they was completing the SMART chats and PAPS correctly (This was completed in 4 drop in sessions (Appendix 25)), whilst some had very little to say except I know what is expected of me when I come to work, I get paid a wage and I customers who are relying on me to resolve their issues why would I not perform? How do we breed these people? How do we bottle that enthusiasm and get everyone thinking on that same page? Everyone has the same training and the same support the only difference would be their commitment to what they see as their day to day role within our organisation.

Winstanley and Stuart smith 1996 state that the ethics of performance management is to have respect for the individual, have mutual respect, have procedural fairness and have transparency of decision making Emerald.com. (1996). As an organisation all of these things have been consider when Managing Performance within Webhelp however the thought that refresher training should be a mandatory requirement if you manage a team of people should be considered to ensure we are reminding consistent in developing everyone's needs as an organisation.

Employee Scorecard

[illegible]

Refer a Friend - UK Payment Schedule

UK - Advisor only

	Timing	UK Payment	Total RAF Payment (Local tax applicable)
Stage 1	Completion - Week 12	£125	UK - £300
Stage 2	Completion - Week 26	£175	

Terms & Conditions

- The Refer a Friend Scheme is for Advisor recruitment only
- Referred candidates must not have worked for Webhelp before
- You cannot be part of your referred candidate's recruitment or decision making process
- You must gain the permission of the candidate before making the referral
- If a candidate is nominated by more than one person, the first nomination received will be processed
- Candidates must not be sourced through a third party (i.e. a Recruitment Agency)
- You must not advertise vacancies on our behalf
- The Refer a Friend scheme is entirely discretionary, non-contractual and does not form part of your terms and conditions of employment
- You can only refer someone within the same country in which you work
- We reserve the right to withdraw, vary or amend the Refer a Friend scheme at any time
- Our decision is final and not subject to adjudication

Referral Payment

All Refer a Friend payments are paid via payroll directly into your bank account, in line with payroll cut-off dates. Please note that Refer a Friend payments are non-pensionable, are subject to the deduction of Tax and or NI depending in which country you work and will appear on your payslip as 'Other Pay'.

Declined payments

- If the referred candidate has already been introduced through another source; for example a recruitment agency, direct application or has already been referred by another employee, and has been progress through the recruitment process prior to referral
- If the new employee is under notice of resignation or dismissal on the date, the referral payment is due
- If the referred candidate fails to start in the role and/or complete the required length of service with Webhelp
- If the referral has not been made via Webhelpfriends.com; or completed at the time of the referred candidate's application
- Retrospective referrals will not be accepted, and payment will not be made where details are completed after the referred candidate's application has been submitted

UK Refer A Friend Payment Schedule	REG42	V1.0	Official Use Only	15/12/2017	15/12/2017
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EARN YOURSELF

£300



REFER A FRIEND



FILL IN THEIR
DETAILS AT
WEBHELPFRIENDS.COM



EARN YOUR
REWARD

webhelp

Team KRAS
Key Objectives H2 2018

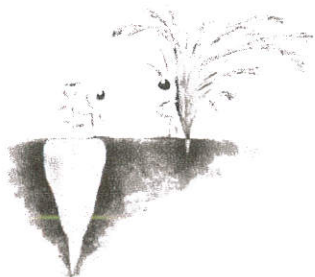
*** All evidenced should be qualified & quantified ***

SPA KRA'S – 20%



IMPROVE PEOPLE HAPPINESS

- a) Roadshows / pop up days
- b) Webpaths?
- c) Diversity & inclusion
- d) Leadership listening?
- e) 30 days happiness
- f) Webhealth???



HAVE STRONG FOUNDATIONS IN PLACE

- a) Line manager capability / Upskill line managers
- b) Communications / newsletter
- c) Methodologies & reporting
- d) Did you know leaflet... basics
- e) Ways of working?
- f) Building team capability



GROW OUR BUSINESS

- a) people projects to support
- b) talent development
- c) driving performance management – PDPs & PAPs
- d) Growth & new business / ramp support
- e) Leadership programme- what does a good leader look like
- f) DTL programme
- g) Develop interns / apprentice



INCREASE PROFITABILITY

- a) Change programmes, reemployment
- b) Absence management including LTS
- c) WIG interventions
- d) Attrition focus
- e) Time banking ?
- f) Reporting and efficiencies
- g) New products and services
- h) Value add for PAS
- i) All costings – ET, Acas, settlements, redundancy, oc health, etc...

Training Survey

Thank you for attending the recent PACT session and for taking the time to complete this survey. This survey should take no longer than 2 minutes to complete and your feedback provided is greatly appreciated.

Hi, Sarah, when you submit this form, the owner will be able to see your name and email address.

* Required

1. Please enter your email address. *

Enter your answer

2. Who delivered your training session? *

Select your answer



3. What date did you attend the training session? *

Please input date in format of dd/MM/yyyy



4. Name of the session you attended? *

Momentum - Conduct & Capability

Momentum - Onboarding

Momentum - Performance Management

PACT - Witness Statements

Performance Review - Skype Session

Glasgow Onboarding

5. How would you rate your overall knowledge & confidence in this subject before taking this session? *

Not												Very
Knowledgeable	1	2	3	4	5	6	7	8	9	10	Knowledgeable	
& Confident											& Confident	

6. Were you satisfied with your opportunity to participate in the session? *

Yes

No

Submit

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PACT - Absence Management

PACT - Allegation Writing

PACT - Allegations & Investigations

PACT - Appeals

PACT - Approaching Sensitive Subjects

PACT - Bullying & Harassment

PACT - Change Management

PACT - Confidentiality

PACT - Discrimination

PACT - Employee Engagement

PACT - Employing Young Workers

PACT - Employment Law

PACT - Exit Management Quick Reference

PACT - Flexible Working

PACT - Grievance

PACT - Health & Safety Inc Claims

PACT - Mass Fraud

PACT - Mediation

PACT - Mental Health Awareness

PACT - New Process - Exit Management

PACT - Note Taking

PACT - Roles & Responsibilities of Chair & Note Taker

PACT - Sexual Harassment

PACT - Social media

PACT - Stress Awareness

Value examples – these are examples only to help as a prompt...

INTEGRITY	Challenging stakeholders, honest feedback, advice, When tested, how have you showed strength in character?
COMMITMENT	Delivering on time? Being realistic with comments whilst not sacrificing team work ethic Consideration for wider team / business needs and adopting activity Commitment to your team
UNITY	India and SA team work , pas, people partners, stakeholder relationships.. Participation and attendance on calls Do you share best practice? When? How? Covering other workloads from the team Showing united front with your sites
RECOGNITION	Star nominations? For you and to others? Open relationship with colleagues Challenge on recognising areas for improvement Attitude and outputs being recognised Seeking feedback and understanding the onus sits with you on getting this to use for improvements
WOW	What have you done that is diff from everyone else? What is your USP and how have you demonstrated this? What is diff about what you have offered and delivered? What have you enhanced or identified as a result of poor performance or a gap in understanding? What changes have you made for the better to the team or business?

Smart Chats

AND PAPS

SMART CHATS

- ▶ SMART chats are informal discussions which can be used for any reason (be it conduct or capability-related), they should be a positive tool for proactive people management and development.



SMART CHAT THE RULES

- When would you issue a SMART chat?
- How long Can a SMART chat be issued for?
- If someone has an expired SMART Chat how should we escalate?

Scenario 1 - complete a Smart Chat for an agent who has been late on 5 occasions. The lateness range from 5 minutes to 1 hour. The agent must travel to work by bus. The bus leaves the stop outside their house at 10past and twenty to the hour and it takes 18 minutes to get into work, the bus stop is just outside work.

Scenario 2 - complete a Smart chat for an agent who has had 5 occasions of absence. There is 2 absences for Mental Health, 1 for a sickness bug, 1 for Toothache and 1 undeclared. Remember to consider what support we can offer and build this into your Smart Chat



Time to swap Smart Chat's and understand if they are effective or not..

Performance action plans

When would
we use a
performance
action plan?

What are the
types of action
plans?

TYPES OF PAPS

Formal – Used for performance management

Maintenance – Once at desired stage to ensure consistency

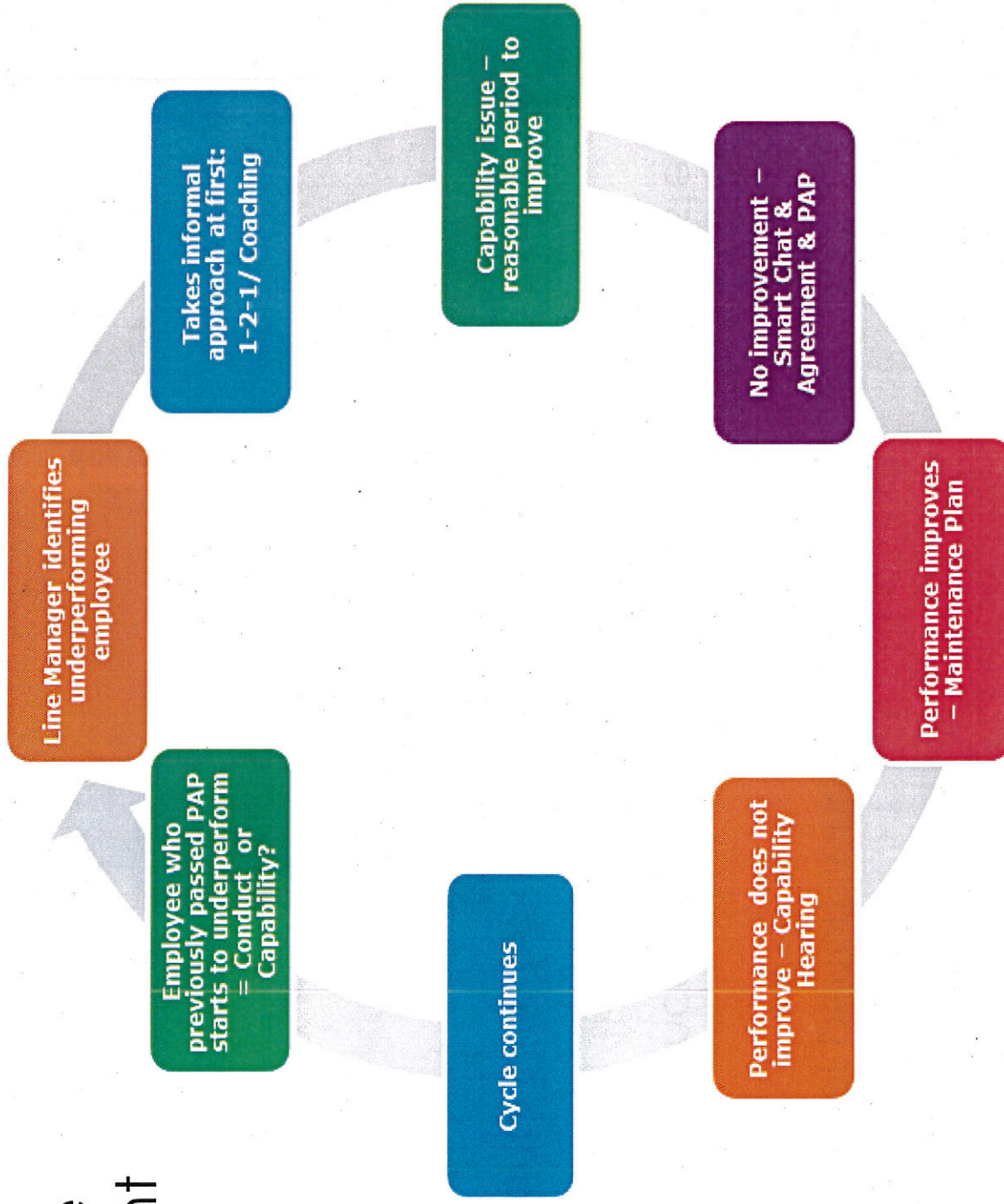
Development – Can be used for both positive and negative

Formal

Maintenance

Development

Performance Management



Scenario

Luke has been a customer with Vodafone for over 10 years,

He had recently upgraded to the brand new Samsung 10 Max, and believes he was told that would be no upfront cost for the phone. Luke was really alarmed to see that he had £99.99 charge added to his bill...

He hit 191 and got through to the Cardiff contact centre.

Sarah had her phone line on mute because she was chatting to her mate sat next door, it took a minute for her to greet the customer. DPA followed correctly

Sarah was polite

Sarah stated that she has lots of problems with the sales team misleading customers

Sarah did not demonstrate empathy, rapport or any positive language

Sarah told the customer she'd raise a call listening to see if the customer was telling the truth and someone would call back in the next few days

Sarah thanked the customer for her call

Sarah raised an SR to have a call listening raised (this took one minute)

Sarah spent 10 minutes in wrap



Time to swap PAPS and see if they are effective
or not..

COACHING TIP USE SMART

Specific:

Measurable:

Achievable:

Results-focused:

Time-bound:

Time f
about
throug
Chats

CIPD Candidate evidence matrix (EXAMPLE)

(CEM1)

Candidate name: Sarah Chislett				CIPD Membership/registration No.:		
Qualification title: CIPD				Unique Learner No. (ULN):		
Unit code	Unit title	Assessment criteria no.	Evidence description	Evidence reference number	Assessor initials	I/V initials if sampled
5A1OP	Contributing to Improving Organisational Performance	1	Performance Management Policy	EV1		
		1	Performance Management Procedure	EV2		
		1	Link to WISE (Local Intranet)	EV3		
		1	KPI template for agents	EV4		
		1	Coaching template for agents	EV5		
		1	Performance action plan template	EV6		
		1	Performance management cycle	EV7		
		1	Performance Management Training	EV8		
		1	Performance Review Training	EV9		
		1	KRA and Values for Team leaders/ Operational managers and support staff	EV10		
		1	PAS details	EV11		
		1	Performance review framework	EV12		
		1	Witness statement	EV13		
		1	Personal development plan	EV14		

	1	360 Feedback	EV15		
	2	Job description	EV16		
	2	Bonus Criteria	EV17		
	2	Advise and support given to Team Leaders	EV18		
	2	Advise are Performance management	EV19		
	3	Employee Scorecard	EV20		
	3	Refer a friend	EV21		
	3	Support staff objectives	EV22		
	3	Training Survey	EV23		
	3	Webhelp Values	EV24		
	3	SMART Chat and PAP refresher training	EV25		

Candidate declaration:

- I confirm that the work/evidence presented for assessment is my own unaided work.
- I have read the assessment regulations and understand that if I am found to have 'copied' from published work without acknowledgement, or from other candidate's work, this may be regarded as plagiarism which is an offence against the assessment regulations and leads to failure in the relevant unit and formal disciplinary action.
- I agree to this work being subjected to scrutiny by textual analysis software if required.
- I understand that my work may be used for future academic/quality assurance purposes in accordance with the provisions of the Data Protection Act 1998.
- I understand that the work/evidence submitted for assessment may not be returned to me and that I have retained a copy for my records.
- I understand that until such time as the assessment grade has been ratified through internal and external quality assurance processes it is not final.

Signature:



Date:

17/09/19

Notes on candidate evidence matrices

Candidates should be encouraged to develop a matrix indicating how their evidence relates to each unit/module and learning outcomes/assessment criteria. This helps advisors and assessors to support candidates to draw links between units and encourage cross-referencing and the possible multi-use of evidence.

Evidence matrices can be developed using the unit/module and learning outcomes/assessment criteria, giving candidates an opportunity to link their evidence to each outcome.

Another approach is to have a more generic form where candidates list evidence and tick relevant boxes to show coverage.

Whatever approach is employed candidates should be encouraged to complete these forms themselves and not expect assessors to do this for them.

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