

Reinventing Performance Management at Gogo, the Inflight Internet Company

Heidi M. Glickman and Emily Fisk

What Is Gogo?

Like many good business ideas, the idea for Gogo began as an idea sketched on a napkin over lunch in a BBQ restaurant. It was 1991, and Gogo's founder, Jimmy Ray, drafted an idea for providing telephone service on airplanes by inverting the signal from cell towers to deliver coverage in the sky over North America. Over subsequent years, this idea became reality, and the customer base was primarily focused on business aviation aircraft rather than commercial airlines. Fast forward to 2006, when the Internet had evolved and email communication and web browsing were just as commonplace as phone calls. This was the year the Federal Communications Commission chose to auction off some spectrum. Gogo placed a bid, won the auction, and began to establish the industry for Wi-Fi on airplanes. Over subsequent years, investments were made to build out the air-to-ground network to provide connectivity in the sky over North America. This included developing and installing on airplanes hardware and software that were needed to facilitate connectivity while traveling hundreds of miles per hour.

By 2008, service was operating on the commercial aircraft of the first couple of commercial aviation customers. Over the next few years, demand for fast, reliable Internet service skyrocketed as passengers wanted connectivity on their personal devices that worked as well during travel in the air as it did on the ground, for everything from email to streaming content. Due to this growing demand, additional customers began coming on board, increasing the customer base, and Gogo also began providing entertainment services (e.g., movies). As customer demand for data usage increased during this time, subsequent generations of technology were rapidly developed and deployed to enable more data to flow across the network.

These changes translated into significant growth for the organization. In 2013, the company had matured to a point where it became a publically traded company. By the end of 2015, Gogo had over 1,000 employees—over a 400% increase from 2008—many of whom had joined from aviation, telecommunications, and Internet industries to be on the forefront of establishing and growing this new niche industry. The size of the workforce and the diversity of industry experience across the employee base in the organization necessitated different ways of communicating and working together.

The need for change was further driven by anticipated changes that would increase the complexity of the business going forward. Factors here included three major changes that would significantly impact Gogo's business model and ecosystem: (1) Internet of things (IoT); (2) technological advances that improved business economics; and (3) market expansion from regional to global.

Internet of things. The evolution of the IoT, which promised new applications for turbulence avoidance, maintenance monitoring, and other operational efficiency opportunities, made commercial airline customers eager to gain greater control over connectivity to enhance their customer experience. This required Gogo's commercial aviation business unit to shift from a business-to consumer (B2C) to a business-to-business (B2B) business model. Making this shift required the company to make changes that ranged from providing customers with more flexibility on the design of user interfaces to look and feel like their brands, to restructuring the pricing to allow for greater segmentation.

Technological advances that improved business economics. With more customers came more data-intensive transmissions, testing the capacity constraints on the existing air-to-ground (ATG) network. At the same time, more satellites were being launched into orbit, which began to lower the cost structure for using satellite connectivity to deliver inflight connectivity. This accelerated the development of new technology to begin satellite connectivity.

Market expansion: Regional to global. Satellites provided the opportunity for the widespread adoption of connectivity by eliminating the geographical constraint of needing to fly over a landmass with an ATG network. Thus, the ability to operate in and across all regions of the world emerged simultaneously. The speed, volume, and complexity of work dramatically increased almost overnight as our potential customer base grew

exponentially, the hardware required to deliver our service went from an overnight installation process to a 3-day installation process, and the need to develop a satellite network with continuous global coverage became an operational imperative.

All three of these shifts created a volatile, uncertain, complex, and ambiguous (VUCA) operating environment and required employees in sales, marketing, operations, product, technology, finance, legal, and human resources (HR) to begin working together very differently going forward. Decisions needed to be made more quickly without sacrificing quality, processes that had once been the purview of a single individual expanded to involve large cross-functional teams, and the organization needed to be able to pivot quickly in the face of rapidly shifting priorities. This increased need for agility and alignment across the organization meant moving from a siloed to a more interconnected way of working to ensure work was not duplicated and that all components of increasingly complex processes were executed efficiently. It also meant that absolute clarity and a fast way to communicate changing priorities from leadership all the way down to individual contributors across the company were needed.

The PM processes designed years ago to support a simpler way of working (including the typical annual goal setting and end-of-year assessment) simply could not be effective in supporting the way employees worked together in this more networked and agile environment, and they would not be effective in an even more VUCA future. Rather than rely on annual steps and processes to ensure people understood their expectations and received feedback, Gogo needed to implement more agile and responsive processes. Expectations and goals needed to be set more flexibly and adjusted as needed to accommodate the fast pace of change; the availability and timeliness of feedback needed to be improved so that performance could be course corrected and issues overcome more quickly.

With this context as a backdrop, it was imperative for company leaders to set the right tone at the top. So, the executive leadership team reassessed, reaffirmed, and clarified our values and the behaviors critical that were necessary for this new, diverse group of employees to work together effectively. In this process, tangible real-world examples of how we need to operate were articulated, and behavioral examples were fleshed out in greater detail to ensure the values could be appropriately translated and practically embedded in all of Gogo's talent practices from selection to onboarding, PM, and development (Figure 5.1).

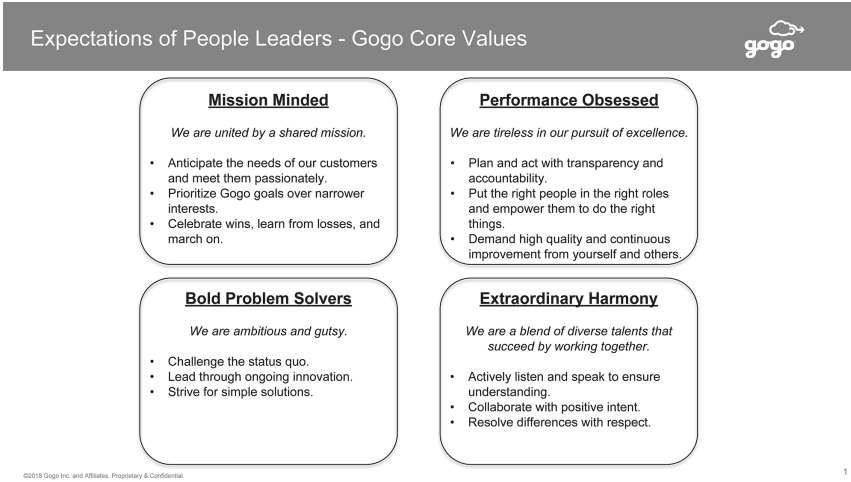


Figure 5.1 Expectations of people leaders: Gogo core values.

At the same time, we also took the opportunity to clarify our talent philosophy, as it was clear that having the best talent would be critical for Gogo’s ongoing success. This meant we would want to refresh our selection practices to ensure we were bringing on the right talent, onboarding new talent more purposefully to accelerate their success, and recognizing and rewarding based on both what was accomplished and how it occurred. And to be effective overall, we would also need to provide an environment that enables our talent to expand their capabilities, excel, and grow.

A key area that we knew would require attention to achieve our talent goals overall was creating a robust feedback environment. Feedback would need to be meaningful and helpful and flow quickly to tighten up learning loops and performance gaps, which in turn would enable greater individual and business performance. We knew that success here would rely on leadership ensuring clarity of direction and alignment on priorities and managers becoming even more effective coaches.

Approach

Our research and design process included an examination of external best and next practices. We also conducted internal research using surveys, interviews, and focus groups. Further, we established an HR Council to

provide input and guidance on design decisions and to serve as champions of the new practices we would implement.

External Research

We began conducting external research using resources like our Bersin by Deloitte membership and other leadership and HR publications to conduct a literature review. We also supplemented this research with one-on-one phone interviews with practitioners at companies who were further along in making changes to their performance practices. These early innovators were a rich source of insight and candor as they had experimented and learned many valuable lessons along the way.

Throughout this process, we learned about the nuances, implications (intended or not) of the key trends like shifting from an annual process to ongoing business process, and updating the overall PM process to be simpler, more flexible, and more agile, as well as much more future (vs. rearview-mirror) focused. By examining best practices from companies like Google, Adobe, Juniper, and Deloitte, we began to understand more about the challenges these organizations were looking to solve and the extent to which elements of the changes they were implementing would be a good fit for Gogo.

Internal Research

We conducted extensive internal research to provide information on changes we should consider making to our PM processes. We began this research by reviewing quantitative and qualitative data from a recent annual employee census survey to identify currently perceived strengths and pain points. We also mined exit interview surveys as well as learning program evaluations and other resources that provided insight into the experiences of our employees.

Next, we held focus groups, inviting a large proportion of our workforce to share their insights on what they loved about working at Gogo and what got in their way of being most effective. We had nearly 20% of the organization participate in these sessions. These sessions were designed with segmentation in mind as we hypothesized there would be differences in employee experience and views associated with job families (e.g., operations, program

management, and software developers might have different needs) and by role (e.g., individual contributors and leaders of people engaged differently in these processes and would likely have different pain points). We also expected that we might encounter differences by office location and for remote workers. So, we grouped these samples accordingly to ensure those nuances were captured.

In addition to focus groups, we conducted one-on-one interviews with all vice presidents (VP) and above leaders who made themselves available. These interviews focused on understanding their priorities as well as pain points they and their team members were experiencing with the existing process.

All of these data collectively provided deep insight into both the strengths and the gaps of the current system and process, which helped ensure we understood our needs and root causes before beginning our design work. We were surprised at how many themes were consistent across different segments of our workforce. These key themes included a desire for more frequent opportunities to discuss performance, for a simple process that enabled coaching and development, and for a flexible process that enabled teams to leverage existing processes and practices around PM without duplicating effort. For example, teams that were already using Scaled Agile Framework (SAFe) tools to assign and prioritize work wanted to be sure they could continue to work this way and did not want to duplicate effort with the performance process.

These shared insights enabled us to approach the design process in a way that provided needed flexibilities within a fairly consistent framework. Our extensive due diligence also helped us gain insight and anticipate the readiness of the organization for change. It was clear that with such a diverse workforce, many of whom had recently joined from companies across a range of industries, there were many different ideas and opinions about what they had seen work and not work elsewhere and thoughts about what may work best for Gogo.

Establishment and Role of the Human Resources Council

With the support from the CEO, the senior VP of HR established an HR Council consisting of representatives from each area of the business selected by their respective executive leadership team (ELT) members

together with our HR business partners (HRBPs). These individuals were direct reports to the ELT members and typically had large spans of control. This group represented key leadership perspectives from across the business as well as the HR perspective from individuals most closely tied to the business.

The talent management team worked closely with the HR Council over several months to build their familiarity with external trends as well as the internal research we had conducted on the employee experience. The council even spent time with an employee from one of the benchmark companies to learn directly from him about his experience on this journey. This individual shared on-the-ground feedback about what it was like to use some of the new PM practices we were considering, including the quarterly cadence of discussions. He was able to share personal observations, including how broadly the new practices were actually adopted (and how long they took to catch on), how much time it took him to complete more frequent performance discussions with his team, and what challenges and benefits he experienced during the change to this new process. Over several months, the group engaged in discussion and debate and provided input into the best path forward; it ultimately rallied around our final recommendations for a process and plan that would best address Gogo's needs.

By far the most valuable contribution of the HR Council was aligning around the purpose of performance management at Gogo. Given the diversity of experiences among group members, there was a wide range of experiences with different PM practices. Based on a thorough review of our talent ecosystem, the group arrived at an agreement that PM at Gogo should focus on three outcomes:

1. Enable enhanced and aligned individual and business performance
2. Provide more effective coaching for employees
3. Increase employee engagement

This meant that Gogo would not design a process to be a catch-all for other needs that could be handled with adjacent practices. For example, a related but supplementary process would be leveraged to address career development/promotion, broader job analysis and compensation decisions, and others. From a design perspective, this focus enabled us to aggressively cut "excess" from the process and significantly streamline the experience for managers and employees in our final product.

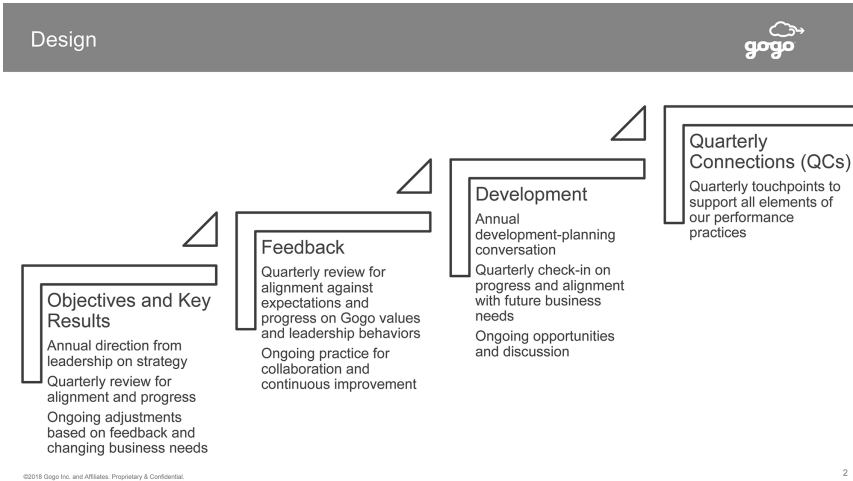


Figure 5.2 Design.

Design of the New System

To achieve the intended goals of the new system, we focused on three key practices and introduced a quarterly process to hold the organization accountable for focusing on them. These are depicted in Figure 5.2.

Objectives and Key Results

To ensure alignment and clear communication, the ELT worked through a balanced scorecard exercise to clarify and create clearer language around our business strategy and the initiatives that operationalize that strategy. Their direct reports also weighed in to help build an ontology defining the roles different departments would play in contributing to these outcomes. This process enabled us to break out and clarify the responsibilities for which each different team would be accountable as well as where we had duplication of efforts and gaps. We then translated these into objectives and key results (OKRs) for each department, team, and individual.

Subsequently, each of the CEO’s direct reports and their leadership teams met on a quarterly basis to assess progress, reflect on learnings, and prioritize needs for the following quarter. This information then informed a subsequent session with the ELT to reprioritize in light of new information,

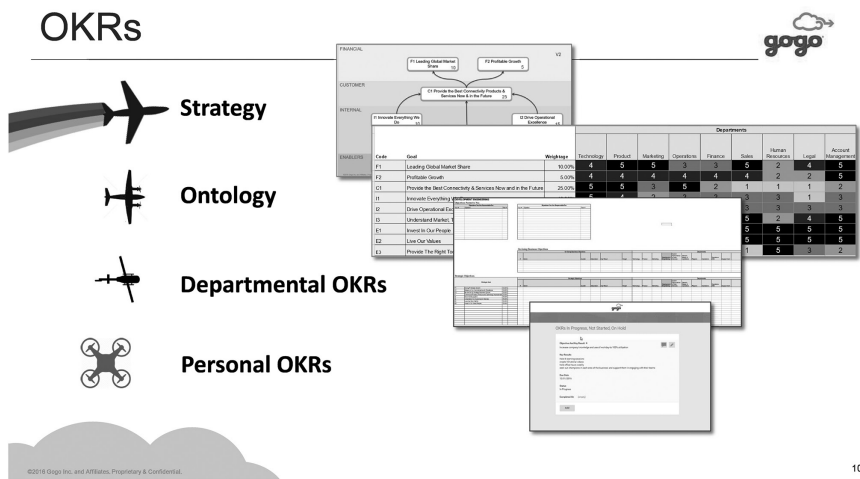


Figure 5.3 Objectives and key results (OKRs).

address gaps, ensure alignment, and then communicate quickly with the employee base so that employees could shift their focus accordingly. In the long term, OKRs are the communication vehicle that ensures employees understand how their work connects to broader company objectives and that they are focused on the most important priorities, even when those priorities change frequently (Figure 5.3).

Feedback-Rich Environment

We also invested heavily in enabling feedback to flow throughout the organization. We began by introducing a social recognition tool in partnership with an external partner, YouEarnedIt. We branded this tool “Gogo Props,” and it was introduced with a lot of fanfare to the organization. This tool created a social platform for employees to publicly reward one another for strong performance and living our values, using points that could be redeemed for a variety of tangible or experiential rewards. The most meaningful recognitions were then posted on e-boards in the hallways to further showcase great examples of desired behaviors and impact, which amplified how meaningful these recognitions were. They also served as a way to identify leads for stories that our communications team wrote and panels/webinars associated with learning and leadership development efforts.

Increasing this grassroots positive feedback primed the pump for enabling more constructive feedback to be shared. To start enabling more constructive feedback to become more commonplace and embedded in how we operate, we were fortunate to have the use of lessons learned retrospectives becoming more consistent in group debriefs. We also invested in learning sessions to help people managers and individual contributors start flexing their muscles in this area. Learning sessions covering best practices for giving and receiving feedback as well as the benefits of a consistent feedback cycle were offered both live and online to both managers and individual contributors, and short “just-in-time” recorded videos of 5 minutes or less were distributed on our internal wiki site as well as by our HRBPs. Associated with this, we also launched a pilot of the anytime feedback tool in Workday, GoGo’s Human Resources Information System (HRIS), which we were implementing along with the changes to the PM process. Without feedback, the opportunity to learn quickly from successes and failures would be stifled, and this feedback was therefore an imperative for building the agile operating environment that Gogo needs to succeed today and into the future.

Developmental Culture

To complement the feedback-rich environment, we knew that we also had to instill a more development-focused culture. Key components of this included leaders modeling the commitment to continuous improvement. To demonstrate this, the ELT all participated in a feedback and coaching process, during which they built active development plans and partnered with a coach to support them in staying accountable for progress. We also invested in development programs and resources for all employees and doubled down on this investment for our highest potential and highest performing critical talent.

We did this by introducing a suite of digital and in-person learning opportunities—including subscriptions to just-in-time tools like LinkedIn Learning, Harvard Manage Mentor, and GlobeSmart®—along with frequent in-person sessions for Navigate (a full-day training on leadership basics for new managers), Situational Leadership, and Leading People @ Gogo (an immersive 6-month experience, including group learning, projects, and

business simulations). We supported these efforts with quarterly meetings for all people leaders that enabled them to connect with one another as well as our senior leadership and work on practicing critical leadership skills together. We also provided a continuous stream of best practice sharing through webinars, panels, and blog posts.

Quarterly Connections

Quarterly Connections (QCs) were launched as a mechanism to promulgate value from the ongoing processes mentioned. This was done through meaningful conversations between employees and their managers. The purpose of the conversations was focused on reflection along with associated learning and planning for future success. This was accomplished by designing the process to be a look back at the prior quarter and a look forward to the current quarter. Content-wise, the focus for each conversation was threefold: what you did (OKRs), how you did it (values and behaviors), and your professional growth. Process-wise, we used a 10-10-10 cadence, asking the employee to get some highlights of the last quarter and plans for the coming quarter into the Workday tool during the first 10 days of the quarter. During the second 10 days of the quarter, managers were expected to review employees input and add their observations and expectations into the Workday tool. And, in the third 10 days of the quarter, employees and managers were expected to meet and discuss, taking a moment to celebrate successes and have meaningful discussions on the learnings from the past quarter and to align on plans for the coming quarter.

Shown in Figure 5.4 are the specific questions that form the framework for the QC conversations. Each reflection question is answered by both the individual employee and the manager. We also include a manager evaluation rating on a narrative, 3-point scale for each of the first two sections. Ratings are used primarily as a communication tool to ensure understanding and create a common view between managers and their direct reports about the individual's level of performance effectiveness, adding an overarching context to interpret the narrative comments. While we use the term *evaluation*, QCs are really designed as a conversation guide—an opportunity for both individuals and their managers to reflect on what they accomplished and

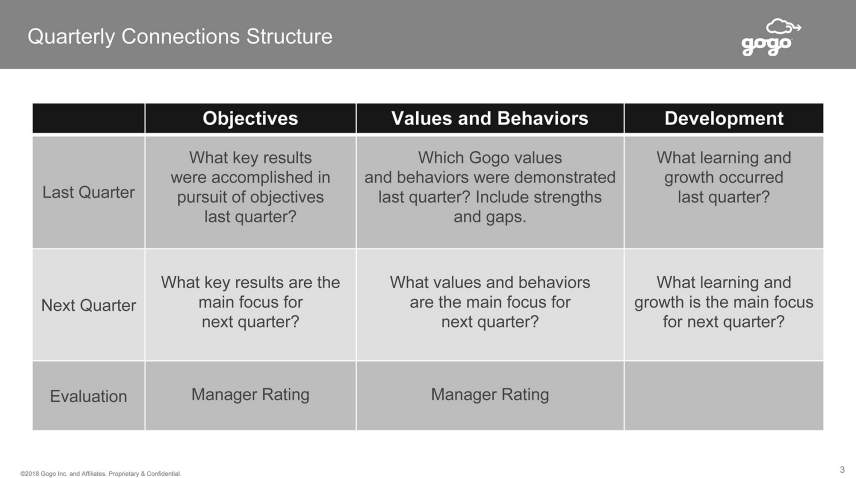


Figure 5.4 Quarterly Connections structure.

what their priorities are moving forward so that they can have a focused, informed conversation.

Our process steps are shown in Figure 5.5. These do not require one-up manager review or HR approvals. However, Workday provides visibility of the evaluations to those groups if the need for review is raised by the employee, the manager, or a future performance concern.

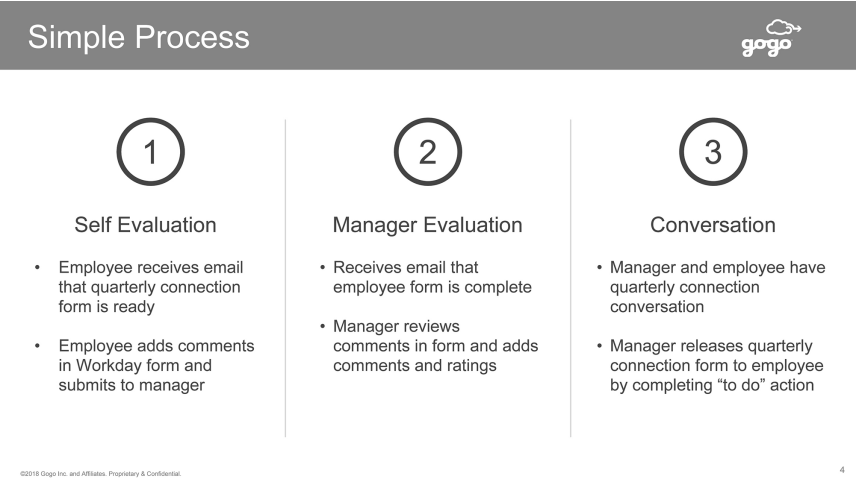


Figure 5.5 Simple process.

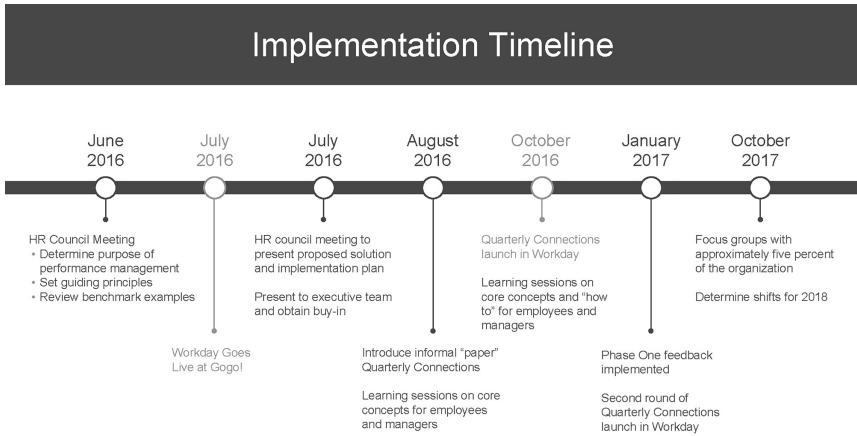


Figure 5.6 Implementation timeline.

Implementation

The implementation schedule is shown in Figure 5.6. With approximately 1,300 employees in the organization at the time of the launch of the new performance practices and a technology solution rolling out to enable it, it did not make sense to leverage a formal “pilot” with a subset of the population. Instead, we introduced the changes over three cycles (quarters) to the whole organization. We gathered feedback and adjusted continuously along the way.

In July 2016, we introduced lightweight paper forms (Figures 5.7 and 5.8) as our concept test, along with a communications campaign encouraging those in the organization to move to more frequent conversations and use the form to prepare/guide their discussion. We also spent time at an “all-manager” quarterly meeting reviewing these concepts and training on how to use the form, give feedback, and ensure a productive conversation.

In October 2016, we introduced more formality and accountability to the process with the provision of Workday technology to enable the process. With the first launch, we included a lot of instruction and examples in the tool itself. We quickly realized this was overwhelming, so we simplified these materials for the subsequent quarter. Over the first four quarters of use, participation continually improved as the organization became familiar with the new practices. While we have seen some fluctuation in participation, we have consistently had over 75% of our workforce completing the process.

Employee Reflection Template

Goals and Objectives	
Discussion Items	Comments/Notes
Q2 What did I accomplish in pursuit of my goals and objectives in Q2? - What key results did I plan to deliver on in Q2? - Did I deliver on these? Elaborate... - Did anything else get introduced in Q2 that shifted my focus/priorities? If so, what?	
Q3 What am I planning to accomplish to support Gogo goals in Q3? - Specify the key results you are planning to achieve in Q3. - Do any priorities need to shift? - Do you anticipate any barriers – if so, what support would you like from your manager to help you overcome them?	
Values and Behaviors	
Discussion Items	Comments/Notes
Q2 How effective was I in living our values and behaviors? - Reflect on how you were mission minded, acted with extraordinary harmony, were performance obsessed and solved problems boldly. - Note: You can visit Gogo Props to download your "Brag Report" to see which values you were most recognized for. - How effectively did you work w/ colleagues on local and cross-functional teams?	
Q3 What values and behaviors will I focus on next quarter? - How will I sustain strong behaviors, and address gaps next quarter? - How do I plan to measure my progress in demonstrating our values and leadership behaviors?	
Learning and Development	
Discussion Items	Comments/Notes
Q2 What did I learn in Q2? - What new experiences/exposure/education did I have? - How did those experiences help me grow my skills, capabilities and/or enhance my performance? - Upon reflection, what are my 3 key learnings from Q2?	
Q3 How do I plan to continue developing next quarter? - What new skills or capabilities would I like to grow in Q3? - How might I learn them?	

Figure 5.7 Employee reflection template.

Manager Reflection Template

Goals and Objectives	
Discussion Items	Comments/Notes
Q2 What was accomplished in pursuit of goals in Q2? - What key results did I expect to see delivered in Q2? - Were these delivered on? Elaborate... - Did anything else get introduced in Q2 that shifted focus/priorities? If so, what?	
Q3 What needs to be accomplished to support Gogo goals in Q3? - Consider the key results you are planning to achieve in Q3 and how this individual's role plays into them. - Do any priorities need to shift?	
Values and Behaviors	
Discussion Items	Comments/Notes
Q2 How effective was this individual in living our values and behaviors? - Reflect on how our core values were demonstrated by this individual; mission minded, acting with extraordinary harmony, performance obsessed solving problems boldly. - Note: You can visit Gogo Props to download your employee's "Brag Report" to see which values they were most recognized for. - How effectively did this individual work w/ colleagues on local and cross-functional teams?	
Q3 What values and behaviors should this individual focus on next quarter? - What gaps would I like to see addressed next quarter? What would success look like in terms of closing those gaps? - Are there any specific relationships this individual needs to cultivate in order to meet needs for the next quarter?	
Learning and Development	
Discussion Items	Comments/Notes
Q2 How did this individual develop and grow in Q2? What new experiences/exposure/education did they have and how has their performance improved as a result?	
Q3 How would you like to see this individual continue to develop next quarter? - What new skills or capabilities would you like them to focus on in Q3? - What budget or opportunities for experiences/exposure/education might be available next quarter?	

Figure 5.8 Manager reflection template.

To reinforce the value of participation, we have continued to showcase managers and employees telling their story about the value they have gained from the process, as seen in Figure 5.9. Some of our biggest critics who were concerned about needing to have conversations four times per year instead of once or twice began realizing that preparation for these conversations was less time consuming than they had expected, feedback was more timely, and joint problem-solving in the moment was providing significant benefits. Having the HRBPs setting expectations for participation, providing reminders, and channeling competition in a positive way by selecting stories to be showcased throughout the organizations also had a significant impact on driving participation.

One of the benefits of having these QCs captured in our Workday system is that this enables us to more quickly identify and address emerging issues. Analysis is done each quarter to see which employees have not had QCs, and the HRBPs explore the rationale for those skipped QCs—particularly in cases where back-to-back quarters are missed. This analysis has led to a number of interventions, including turning around performance challenges and investing in further building specific managers' PM and coaching capabilities.

In October 2017, after four cycles of having the new process in place, we conducted additional segmented focus groups to ensure we were continuing to capture input from our workforce after the initial hurdle of adoption.

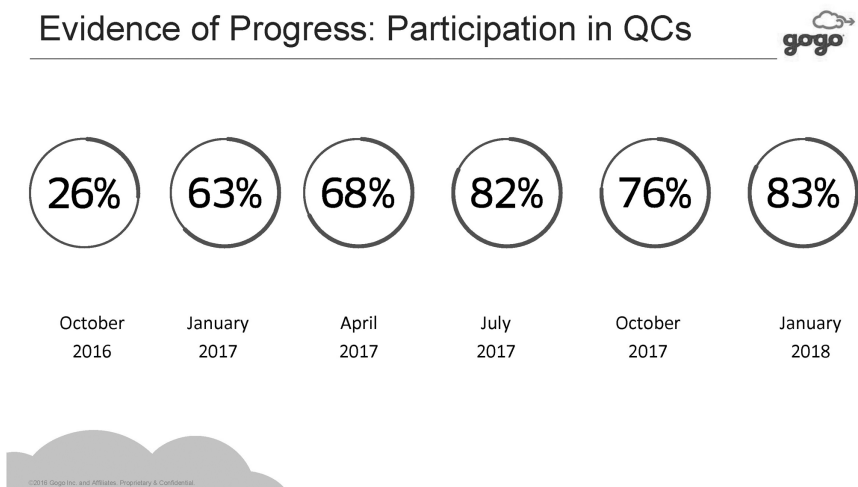


Figure 5.9 Evidence of progress: Participation in QCs.

While we received numerous tactical suggestions about how the form could continue to be enhanced, most participants had begun to see the value of the QC process—consistent with our intended purposes.

Because these focus groups included just 5% of our workforce, we also reviewed data a couple of months later that were collected as part of our annual employee engagement survey. Among the nine engagement driver dimensions included in the survey, the “manager” dimension increased by 5 points year over year—more improvement than any other dimension on our survey. Specifically, as shown in Figure 5.10, we saw the most improvement in items that were focused on manager coaching, removing obstacles, and providing feedback that helps improve performance.

While our data showed evidence of positive change that supported the new system, information from both the focus groups and the survey comments also clearly showed that additional work was needed in three areas, despite the improvements: (1) doing more to consistently ensure a feedback-rich culture, (2) developing manager capabilities to effectively manage performance further, and (3) continuing to enhance program tools to allow for better differentiation of employees and to better highlight the alignment of goals/OKRs into performance reviews. We are now focused on addressing those concerns through a variety of continuous improvement efforts.

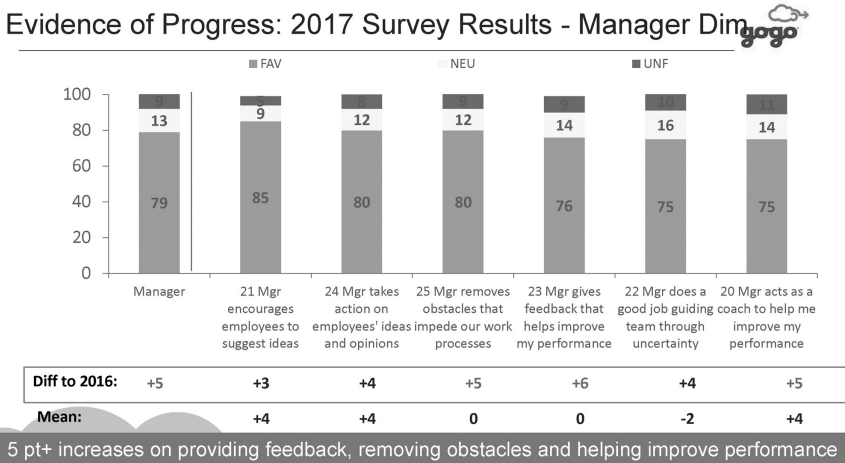


Figure 5.10 Evidence of progress: Survey Results for managers.

Feedback

Focus group participants asked for additional avenues for feedback from stakeholders other than their managers in order to gain a clearer and unbiased understanding of their performance. A desire was also expressed for more digital tools to track and share feedback. In addition to doubling down our efforts around benefits and best practices for delivering feedback in our existing education and training offerings for managers, we began offering additional tools through Workday, enabling managers to request feedback from key stakeholders about their direct reports. We also increased our promotion of existing feedback tools and tactics on our daily company blog and e-board screens in our lobbies and common areas.

Manager Capabilities

We heard from many participants that they appreciated frequent opportunities for PM discussions, but that their managers either did not participate or did not fully utilize the practices to ensure a meaningful and actionable discussion. It became clear that managers and leaders needed to demonstrate their commitment in order for the benefits to reach the full organization. We responded to this by increasing our commitment to training managers on our PM practices through Navigate, our learning program designed to cover “manager fundamentals.” This segment of the course was expanded and redesigned to bring in other managers to share their experiences on our processes in a manner that would help the value of the learnings stick.

We used system-generated data to identify gaps in participation. With clarity on our gaps, we then had discussions with HRBPs, who in turn had discussions with their leaders to identify specific areas of the organization where participation was lacking. This led to discussions and actions taken to increase their participation in our PM practices, which often included further education concerning the value of this time investment. We also continued to leverage the HR Council and other PM champions within the leadership team to demonstrate and communicate the importance of participating fully in our practices.

Enhanced Program Tools

While we saw strong participation in the QC process, we saw much lower participation and activity in the goal/OKR setting and tracking section of our Workday tool. This was explained by feedback from the focus groups that the OKR functionality was clunky, and that it was difficult to demonstrate meaningful linkage to the company strategy or their team leader's priorities. Many participants only captured their OKRs by outlining them in the QC form itself or used other trackers. Research on ways to better integrate the OKR/goal-setting tool with the QC form is under way, as well as research on configuration options that will better demonstrate (and enable reporting on) the way OKRs support and relate to one another as well as to organizational priorities and strategy.

Lessons Learned

We had lessons learned in four key areas from this change process that are noteworthy to discuss and inspire associated recommendations for successful implementation of PM transformation that we believe will be of value to others making this type of change.

Leadership/Stakeholder Engagement/Champions

While we had a thorough project plan with significant stakeholder engagement baked in, it would have been helpful to have even more. Inevitably, steering committee members would run into conflicts and occasionally had to miss meetings. Because of the nuanced discussions taking place in these meetings, sending updates via email on decisions that had been made and the rationale for them was not enough to fully educate stakeholders to the degree and level that would enable them to act as champions in communicating about the new process more broadly and with strong conviction. Adding time to ensure individual conversations could happen in addition to the written updates would have had greater impact and is a key takeaway from our experience.

Philosophy and Guiding Principles

While we knew that the upfront work we had done to build alignment on our philosophy and guiding principles was essential, we had underestimated just how often we would need to refer back to this as different suggestions for changes came in. The foundation we laid initially about imperatives for change and goals for the new process served as a litmus test for evaluating new ideas for continuous improvement that continued to come in throughout the development process. Without this clear point of view on purpose and value to refer to, in the heat of the moment we may have responded to ideas and engaged in problem-solving less effectively, with risk of making changes that would have been inconsistent with our intended purpose.

User Experience

Given the expectation of having participation in this process four times per year, it was imperative to make the process as simple as possible and ensure the technology enabling it could provide a “consumer grade” experience. This investment of employee and management time required had to be perceived as adding significant value as there is low tolerance for anything clunky and with perceived low value when you have an entire workforce investing time and energy in it on a regular basis. While simplicity and high value were embedded in our philosophy and guiding principles for PM, the multiple components of the process presented ample opportunity for these intentions to unwind. The design of the QC form (following some adjustments in the first few cycles) continues to work quite well; however, the linkage between this and the OKRs still is not as seamlessly integrated as would be ideal. The root cause of this issue has multiple components, some technology constraints currently under review and revision, some business process issues, and proliferation of a range of different tools in different areas of the business.

Integration with Other Business Processes

With new processes evolving throughout the organization, including updates to our financial planning and analysis processes, budgeting processes, and

evolving quarterly business review processes, it was imperative to stay informed of these so that we could both influence what was being implemented to fit our HR processes and adapt our processes to these new business processes. The risk of developing shadow processes and their implications should not be underestimated. The challenge is that individuals with talent management, the owner of our performance practices, often are not in the room for some of these business process discussions, meaning we can miss potential alignment issues and see these only after the fact. We have found the answer to lie in having our HRBPs listening for and anticipating risks and then sharing information in the moment, as well as allocating time in our monthly HR operational meetings to share information and troubleshoot opportunities with other HRBPs and talent management. While the HRBPs played a critical role in design and implementation, they also play a key role in ongoing governance and viability. Having both the relationships and the mechanisms (e.g., regular meetings) in place for surfacing issues and risks is imperative to ensure the performance systems remain in alignment with other business processes.