Performance Management

Performance management revolves around the ability to give a learner constructive feedback so that they can improve the quality of their work. Goals that are in the interest of your company and/or individuals can be defined and assigned to learners based on the position they hold, the organisation they work in or other factors. Learners can be assessed on their progress toward these goals through feedback provided by their peers, managers and any nominated appraisers within your organisation.

Performance management integration in Totara assists trainers and managers in delivering the most appropriate learning content for learners to excel. Improving employee performance requires more than just an annual review; it requires ongoing discussion, feedback and analysis to help learners meet company and personal goals.

Benefits of using performance management

Flexible implementation

Your organisation has its own culture, structure, and business needs. Performance management has been designed to be as flexible as possible, allowing you to customise it in the way that best meets your needs. Totara provides the functionality to create goals, goal rating scales, appraisal forms, and 360° feedback, leaving the details up to you to implement as best fits your needs.

Reporting

Collecting feedback and conducting appraisals has no value without providing strong reporting tools to transform the data collected into useful information. By collecting feedback and appraisal data online, the existing custom Report Builder functionality can be leveraged to provide reporting, whether it is a detailed examination of learner progress or high-level summaries for management review.

Key functionality

There are four major features:

Goals

Goals provide a way for you to define the key areas required for learners to consider during their performance appraisal. Goals have been divided into two types 'Company Goals' and 'Personal Goals'.

'Company Goals' represent the aims of your organisation as a whole. Typically an administrator or HR manager would create them. They are structured as one or more hierarchical trees, allowing for high-level goals that can be broken down into sub goals. Company goals would be visible across your organisation and assigned to individuals or groups to achieve.

'Personal Goals' represent more targeted, specific goals for an individual user to achieve. Personal goals are specific to the individual user they are created for, and do not form part of the overall site wide hierarchy. Personal goals are private between the user and their manager.

An individual can view and manage their goals via their *My Goals* page. Managers can access an overview or details of their staff's goals via their *My Team* page. Administrators can update the company goals and report on the overall progress towards achieving them.

Appraisals

The purpose of the appraisal system is to facilitate discussions between a user and their appraiser, to provide a structure that explains what needs to be done, when and by whom. Integration with the learning management system allows progress to be reviewed more efficiently, and an all-digital format gives direct access to progress and outputs for the purpose of reporting. Totara recognises that the appraisal needs of all organisations are different, so the focus is on providing a flexible system which can be tailored to meet a wide range of needs. It provides an appraisal form builder to allow your administrators to create custom appraisal forms and assign the forms to groups of people within your organisation.

Typically the appraisal process takes place over a specific time-frame, so it allows administrators to define specific 'Stages' during which certain actions must be completed. It also provides a system for notifying the participants that actions are required or are overdue.

 Typically there are at least two roles involved with the appraisal process. Totara supports five specific roles:

- **Learner:** This refers to the employee being appraised.
- **Manager:** This refers to the direct manager of the learner. Currently only the manager of a user's primary position is considered.
- **Manager's Manager:** This refers to the manager of the learner's manager.
- **Appraiser:** This refers to another user who has been assigned to review a learner's appraisal. No specific relationship to the user is required; instead the appraiser is manually set via the user profile position page.
- **Administrator:** This refers to the site administrator or HR representative who is managing the appraisal process.

An individual can interact with their current and past appraisals via their *Appraisals* page. Managers can access an overview or details of their staff's appraisals via their *All Appraisals* page. Administrators can control the process, assign users, manage notifications, and report on the site wide progress towards achieving them.

360° feedback

360° feedback provides a mechanism for individual users to receive feedback on their progress from a group of their peers. This provides a useful additional input into the appraisal process that complements the traditional model of a user having discussions with their manager.

A flexible form builder is provided to allow administrators to specify the structure of the feedback and control which users can use the form. Users have access to a feedback request tool which allows them to ask a group of their peers to give feedback on them. Users can track the progress of their requests, send reminders and view responses as they come in.

Reporting

One of the benefits of an online appraisal system is that reporting becomes much more straightforward and manageable. There are two types of reporting; 'Progress tracking' and 'Metrics'.

Progress tracking provides interested users with a way to see ongoing progress on the appraisal process. It allows the appraisal manager to see progress both in absolute terms, and relative to what is expected at that point in time.

Appraisal results reporting (metrics) give access to the data provided by individuals during the appraisal process, providing a way to understand the performance of individuals or groups within your organisation. This quantitative data can be used to easily identify high or low performers across groups, teams, or the whole organisation. In both cases reporting is provided at multiple levels of detail, with aggregated data giving an overview, but with the ability to drill down to more detailed individual reports.