

D Dialog



Design new Performance
Management cycle
Platform configuration

Introduction

You have decided to transform your Performance Management (PM) cycle. But how do you arrive at a modern alternative? We start by determining the guiding principles of your Performance Management cycle. We do this on the basis of the following themes:

- ✓ **Focus** - What core components should be included in the PM-cycle?
- ✓ **Setting goals** - What are the roles and responsibilities around goal setting?
- ✓ **Feedback** - How do you want to make use of the feedback functionalities?
- ✓ **Questionnaires** - What feedback questionnaires would you like to use?
- ✓ **Evaluate** - How do you evaluate performance and development?
- ✓ **Talent Review** - Do you use a staff review or 9-grid?
- ✓ **Terms & texts** - Which terms would you like to use in the online platform?

These guiding principles will be used to configure the online platform. For each of the themes we will discuss the options, and the result your choices have on the usage of the platform. This will provide a starting point.



Focus

The Performance Management cycle is intended to provide focus. The question that arises from that is: What core components should be included in the new Performance Management cycle? A few options are given below:

Setting goals

The goals allow employees to fulfil his/her role. In this way, you help employees to become even better and more effective in what they do on a daily basis.

The organisational and team goals offer direction and connect the work of colleagues and teams. The development goals can contribute to the continued personal development of employees.

Feedback

To stay in conversation with each other, you can use feedback. This can be about a goal from the personal plan. We also offer questionnaires that you can use.

Evaluate

In order to reflect on development and progress, you can use an evaluation in Dialog. You can do this as often as you like at different (fixed) moments in a cycle. You can decide what the evaluation looks like.

Personal development

If you want to encourage personal development, you can help employees by focusing on certain themes and activate them to undertake action. For example, receiving training or preparing for advancement to a next position.

Do you want to have the themes below in your HR- cycle?

Yes

No

✓ **Positions**

In many positions or roles, the work that needs to be done is quite clear. In those cases, you mainly want to discuss how an employee fulfils that role. In this way, you help employees to become even better and more effective in what they do on a daily basis.

✓ **Organisational goals**

Many employees feel the need to contribute to 'something bigger'. Organisational goals offer direction and connect the work of colleagues and teams. Employees can – if relevant – determine their contribution to these goals.

✓ **Team goals**

Collaboration and self-organisation in teams is becoming increasingly more important. As a team, therefore, it is valuable to set goals and agree who plays what role in achieving them. Subsequently, it is important that the team regularly discusses its progress.

✓ **Core values**

The organisation uses core values to describe what it considers important in its way of working. They give substance to the way in which you deal with clients and colleagues. Unfortunately, however, core values are often a paper exercise and hardly play a role in daily practice.

✓ **Competencies**

Competencies indicate which behaviours you expect from people with a certain role. For example, social skills, communication skills, language skills and personal habits. By focusing on these, you help employees to develop further.

✓ **Dialog competency set ([see document](#))**

✓ **Personal development**

If you want to encourage personal development, you can help employees by focusing on certain themes and activate them to undertake action. For example, receiving training or preparing for advancement to a next function.

If you want to focus on positions, organisational goals, team goals, core values and/or competencies in the Performance Management cycle, please fill these in the [Excel](#).

General remarks



Setting goals

Traditionally, the Performance Management cycle has been the domain of executive managers (or team leads) and the HR department. In many organisations, however, employees and teams are gaining more and more autonomy. Therefore, it is important to determine who is in charge of setting goals in a personal plan. Of course, this depends enormously on how you want to work together. And who has what insights into an employee's goals.

In Dialog, we implement goal setting in the following way:

Theme - Setting goals

Setting

Who sets the goals in the employee's personal plan?

Goals are set by:

Employees Managers

Employees may set and change goals in the personal plan intake

Yes

No

Supervisors need to approve the plan and possible changes

Yes

No, no approval is required

In Dialog you have the possibility to use fixed goals, linked to positions. If you choose fixed goals, these goals will directly be set in the employee's personal plan.

Yes

No

Do you want to use fixed goals?

Who has insights in the employee's performance and development goals?

By default, who is allowed to see an employee's performance and development goals?

Managers & employee

Managers, colleagues & employee

Employees may differ from the default privacy settings and can shield development goals from their colleagues.

Yes

No, employee's may not differ from the privacy settings

Employees can see team members and can get insights into each other's goals and feedback.

Yes

No

General remarks



Feedback

In order to promote collaboration between people, it is useful to provide insight into what people are working on, what they want to develop and how they are doing. Asking and giving feedback can be part of that.

In Dialog, we implement feedback in the following way:

Theme - Feedback

To whom can an employee ask and give feedback?

Are employees allowed to ask people outside the organization for feedback?

By default, who is allowed to see an employee's received feedback?

Are employees allowed to delete received feedback?

Are employees allowed to make received feedback private?

Setting

Employees may give and ask for feedback to anyone in the organisation

Employees may give and ask for feedback only to immediate colleagues

Yes

No

Only the receiver and feedback giver

The receiver, the giver, and the managers of the receiver

The receiver, giver, managers and colleagues of the receiver

Yes

No

Yes

No

General remarks



Questionnaires - Feedback

It is possible to use standard feedback questionnaires in Dialog.

What feedback questionnaires do you want to use?

Yes No

✓ **Questionnaire: Stop-Start-Continue**

- What do you want me to stop doing?
- What do you want me to start doing?
- What do you want me to continue doing?

✓ **Questionnaire: Project review**

- What do you think I did well in the project?
- What do you think I could have done better in the project?
- How do you assess the project's result?

✓ **Questionnaire: Personal development**

- What do you see as my greatest talent?
- In what area do you think I can develop further?
- What kind of work do you really think suits me?

✓ **Questionnaire: Out-of-the-box**

- What life motto do you think is right for me?
- For what problem would you call in my help right away?
- If you started your own business, for what position would you hire me?

✓ **Would you like to add your own questionnaire?**

If so, please fill it out below:

Title:	
Questions:	
Rating (optional):	



Evaluate

It is important to review the development and progress of employees regularly. In Dialog you can use a midterm and final evaluation for this purpose. You can define these moments in the cycle.

In Dialog, you can define your evaluation cycles based on the following choices:

Theme - Evaluate

Is there a team/ department/ BU for which a different PM cycle should be set up?

PM cycle duration

Interim evaluation (optional*)

**These can also be several interim moments*

We use several interim moments.

Final evaluation

The review is signed digitally (approved) by the manager and the employee.

Setting

Yes, that is:

No

Start date:

End date:

Yes, we use interim evaluation

If yes:

Open from:

Open until:

Announcement email on:

No

Yes

If yes:

Open from:

Open until:

Announcement email on:

No

Yes, we use final evaluation

If yes:

Open from:

Open until:

Announcement email on:

No

Yes, manager(s) & employees have to approve an evaluation

If yes:

At the interim evaluation(s)

At the final evaluation

No

Elements of evaluation form

In Dialog, you have different elements that you can include in the evaluation form.

Elements of evaluation form

If there are positions in Dialog, they are also included in the evaluations.

Yes, positions are included in the evaluations
If yes, in which evaluations:

At the interim evaluation(s)

At the final evaluation

No

If there are core values in Dialog, they are also included in the evaluations.

Yes, core values are included in the evaluations
If yes, in which evaluations:

At the interim evaluation(s)

At the final evaluation

No

If there are competencies in Dialog, they are also included in the evaluations.

Yes, competencies are included in the evaluations
If yes, in which evaluations:

At the interim evaluation(s)

At the final evaluation

No

Employee and manager(s) both fill out the evaluations
(Employee and manager(s) both prepare the evaluations)

Who fills out the evaluation:

Employee

Manager(s)

Manager(s) & employee

Employee and manager(s) both give the final score.

Who fills out the final score:

Employee

Manager(s)

Manager(s) & employee

General remarks

Calibration

The purpose of a calibration is to create a standard for reviewing employees. This session takes place before the review conversations and enables managers to learn from each other.

Theme - Evaluate, Calibration

Do you want the final evaluator (manager) to fill out a calibration in preparation for an evaluation moment?

Setting

Yes, then you have the following choices:

Start date:

End date:

No

Additional evaluation options

If the employee or manager feels the need, they can always initiate or schedule an evaluation themselves, at any time.

Yes, employees and managers may always initiate or schedule an evaluation

Name of evaluation:

Template for the evaluation:

Interim evaluation

Final evaluation

Other

No

In addition, you can set who fills out that spontaneous evaluation.

Who fills out the evaluation:

Employee

Manager(s)

Manager(s) & employee

General remarks

Reflection questions interim review

A great conversation can only occur when the right questions are asked. In Dialog, we ask the following reflection questions, by default.

You can check per question whether you want to use it for the midterm evaluation:

Interim review

Reflection questions for employees:

Would you like to use our standard?

Yes

No

What have you learned in the past period?

Looking back on the past period, what are you most proud of?

Where did you get the most energy in the last period?

What has cost you energy in the past period?

How do you like your current role? And what role do you possibly aspire to?

What do you want to learn or develop in the coming period?

Reflection questions for managers:

What compliment do you want to give this colleague?

What (development) tip would you like to give this colleague?

What else do you want to talk about?

Reflection questions final review

You can check per question whether you want to use it for the final evaluation:

Final review

Reflection questions for employees:

Would you like to use our standard?

Do you want to deviate from this approach?
If so, please indicate that below:

Yes

No

What have you learned in the past period?

Looking back on the past period, what are you most proud of?

Where did you get the most energy in the last period?

What has cost you energy in the past period?

How do you like your current role? And what role do you possibly aspire to?

What do you want to learn or develop in the coming period?

Reflection questions for managers:

Do you want to deviate from this approach?
If so, please indicate that below:

What compliment do you want to give this colleague?

What (development) tip would you like to give this colleague?

What else do you want to talk about?

Scoring

It is also possible to evaluate goals and development objectives quantitatively and conclude the evaluation with a final conclusion.

In Dialog we use the following scores by default:

Would you like to use our standard?

**Do you want to deviate from this approach?
If so, please indicate that below:**

Yes

No

✓ Interim review: Give attention, Doing well, Above expectations

Improve customer satisfaction

Give attention

What have you achieved in the past period?

General remarks

✓ Final review: Could be better, Good, Above expectations

Customer centered

Could be better

What have you learned in the past period?

General remarks

✓ Final assessment (Completion): Development needed, Successful, Outstanding

How do you think it went in the past period?

Development needed

Successful

Outstanding

Write your answer here

General remarks

Personal development

In your PM cycle, you pay attention to personal development and offer inspiration based on position, team and organisational goals and competencies. You can also offer inspiration based on the 3 themes below.

These themes have a central place in Dialog to encourage employees' personal development:

Ambition

Would you like to take the next step in your career?

+ Add your own goal

Education & training

What training do you want to follow?

+ Add your own goal

Personal development

What do you want to personally develop further?

+ Add your own goal

Do you want to deviate from this approach? If so, please indicate that below:

Would you like to use our standard? Yes No

Ambition:

Education & training:

Personal development:

Add extra question:

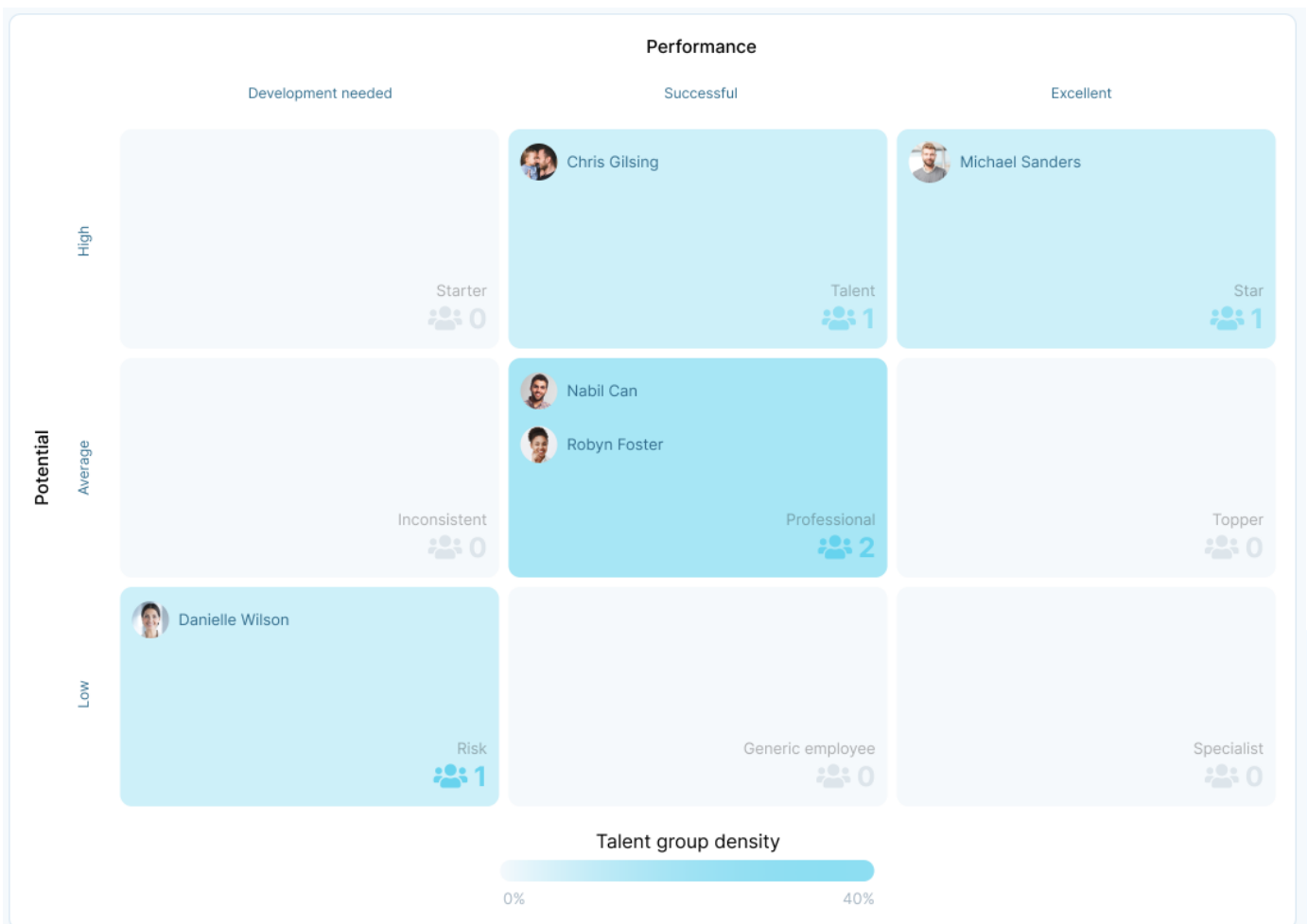


Talent Review

A Talent Review is intended to provide insight into how well employees perform and how much potential they have. A Talent Review is also called a 9-grid.

In Dialog the default Talent Review settings are as follows:

- ✓ Managers indicate the current level of performance for each employee (x-axis: performance)
- ✓ Managers indicate the level of potential for each employee (y-axis: potential)
- ✓ The selection presented on the x-axis is based upon the scores used during the final review
- ✓ The selection presented on the y-axis is low - normal - high by default
- ✓ Talent Review will be active from May to June (invitation: June 1st).



Talent Review

Would you like to use the Talent Review?

Yes, your Customer Success Manager will be in touch to make this happen

No

Algemene opmerkingen



Terms & texts

It is possible to modify certain terms in Dialog. Do you want to deviate from the standard terminology? If so, please indicate that below:

Organisational goal

Team goal

Performance goal

Development goal

Core values

Competencies

Review

Self-assessment

Review moment

Reviewer

Calibration

Talent Review

Calibration

Coach

Position

Responsibilities