



## Performance, Succession, and Development



Employee ID	Name	Job Title	Employment Status	Sub Unit	Job Center	Location	Supervisor
EM0102	Peter Anderson	Chief Financial Officer	Full Time Permanent	Management	Head Office	HQ - CA, USA	
EM0101	Linda Anderson	Head of Support	Full Time Permanent	Technical Support	Head Office	HQ - CA, USA	Jordan Mathews
EM0103	Louise Anderson	Customer Success Manager	Part Time Contract	Client Services	EU - Liverpool (Shared Services)	London Office	Jordan Mathews
EM0109	Richard Arnold	Support Specialist	Full Time Permanent	Technical Support	Shared Office	London Office	Linda Anderson
EM0107	Alexandra Powell Aulsebrook	Database Administrator	Full Time Permanent	IT/ISys	France Regional HQ	Orléans Hub	
EM0106	Max Aguiar	Support Specialist	Full Time Permanent	Technical Support	France Regional HQ	France Regional HQ	Linda Anderson
EM0108	Marcelle Barnette	Sales Representative	Part Time Permanent	Sales	New York Office	New York Office	Mia Mathews
EM0104	Chris Lumbard Smith	Account Assistant	Full Time Permanent	Finance	British Center	British Center	Anna Mathews
EM0105	Ruth Johnson	Customer Specialist	Full Time Permanent	Marketing	Canadian Center	Canadian Center	Mia Mathews
EM0100	Marion Bruggard	Software Engineer	Full Time Permanent	Development	Canadian Center	Canada Region	
EM0107	Shelva Brinkley	Software Engineer	Full Time Permanent	Development	Singapore Regional HQ	Singapore Regional HQ	Carla Mathews
EM0108	Royal Brownell	Sales Representative	Part Time Permanent	Quality Product Sale	Texas Center	Texas Center	Mia Mathews
EM0100	Sherrice Blue Chang	QA Engineer	Full Time Permanent	Quality Assurance	Canadian Regional HQ	Canada Region	Walter Pugh



## Continuous Improvement and Growth for Your Employees

With OrangeHRM's **Performance Management** module, you get a powerful tool to help employees aspire and reach their full potential. Through continuous tracking of performance against goals, your employees are better enabled to develop core competencies in tandem with job responsibilities. By defining important Key Performance Indicators (KPIs) and assigning to employees, managers are able to track progress in real-time accelerating skill development. Performance appraisals can also include multiple reviewers, providing valuable 360-degree feedback. Continuous Performance Management (CPM) is a technique that helps build stronger engagement with your employees through frequent conversations, feedback, and reviews. Practicing real-time feedback and communication for all employees is a winning formula for your organization.

## Setting Goals and Tracking Progress



Goals						
***	Goal Name	Completion	Owner	Due Date ↑	Status	Level
	Technical Support Team - Level 2 Improvements for ISO Setup RT ticketing platform for client submissions	0%	Linda Jane Anderson	Wed, 01 May 2019	Pending	Organizational
<input type="checkbox"/>	Technical Support Team - Level 2 Improvements for ISO Setup Vtiger CRM for automatic case creation	32%	Linda Jane Anderson	Wed, 05 Jun 2019	In Progress	Individual
>	Successfully launch version 5 of our main product	61%	Linda Jane Anderson	Fri, 30 Aug 2019	Pending	Organizational
<input type="checkbox"/>	Close 30 tsupport tickets related to the project "CCL"	10%	Linda Jane Anderson	Tue, 31 Mar 2020	In Progress	Individual

Through a collaborative process, supervisors work with employees to determine performance goals (or KPIs) relevant to their job, career development, and aspirations. New goals can be added by both the supervisor and employee, and adjusted to reflect the current performance and development needs. Once goals are implemented, supervisors can easily monitor and track progress.

For large organizations, managers are able to utilize the module's "bulk assignment" feature to assign similar goals to groups of employees based on job functions and/or location - saving considerable time and effort!

With Performance Management, you can make sure employee goals are aligned with those of the organization and company. When goals align top to bottom and everyone is moving in the same direction to support the greater mission, companies are more likely to achieve results and success.



## Advanced Performance Tracking by OKRs

Objective Key Results (OKRs) facilitate **Advanced Performance Tracking** by measuring an employee's progress against their completed goals and objectives. Employees are empowered to not only define goals, but also on how they will be measured – **key result metrics**. Employees that are included in defining result metrics will often show a greater sense of job ownership (increased morale) which can be great for the organization.

OKRs are defined as a percentage or number metric to monitor goal progress and completion.

The screenshot shows the OrangeHRM interface for managing Key Results. The main heading is "Improve customer Satisfaction > Key Results". The goal being tracked is "Get New Customer". A progress indicator shows 100% completion. The goal is associated with the parent goal "Improve customer Satisfaction" and has a due date of "2019-05-01". The goal is assigned to "Adam Oliver" and has a status of "Pending". The goal is tracked using a metric of "Customer" with a format of "Number x,xxx". The goal has a start value of 10, a target value of 50, and a current value of 50. The goal is evaluated by "Main Evaluator", "Self", and "Supervisors".

Start Value*	Target Value*	Current Value*
10	50	50

Parent Goal	Due Date*
Improve customer Satisfaction	2019-05-01

Assigned To*	Status
Adam Oliver	Pending

Evaluator Groups
<input checked="" type="checkbox"/> Main Evaluator
<input checked="" type="checkbox"/> Self
<input checked="" type="checkbox"/> Supervisors
<input type="checkbox"/> Peers
<input type="checkbox"/> Subordinates





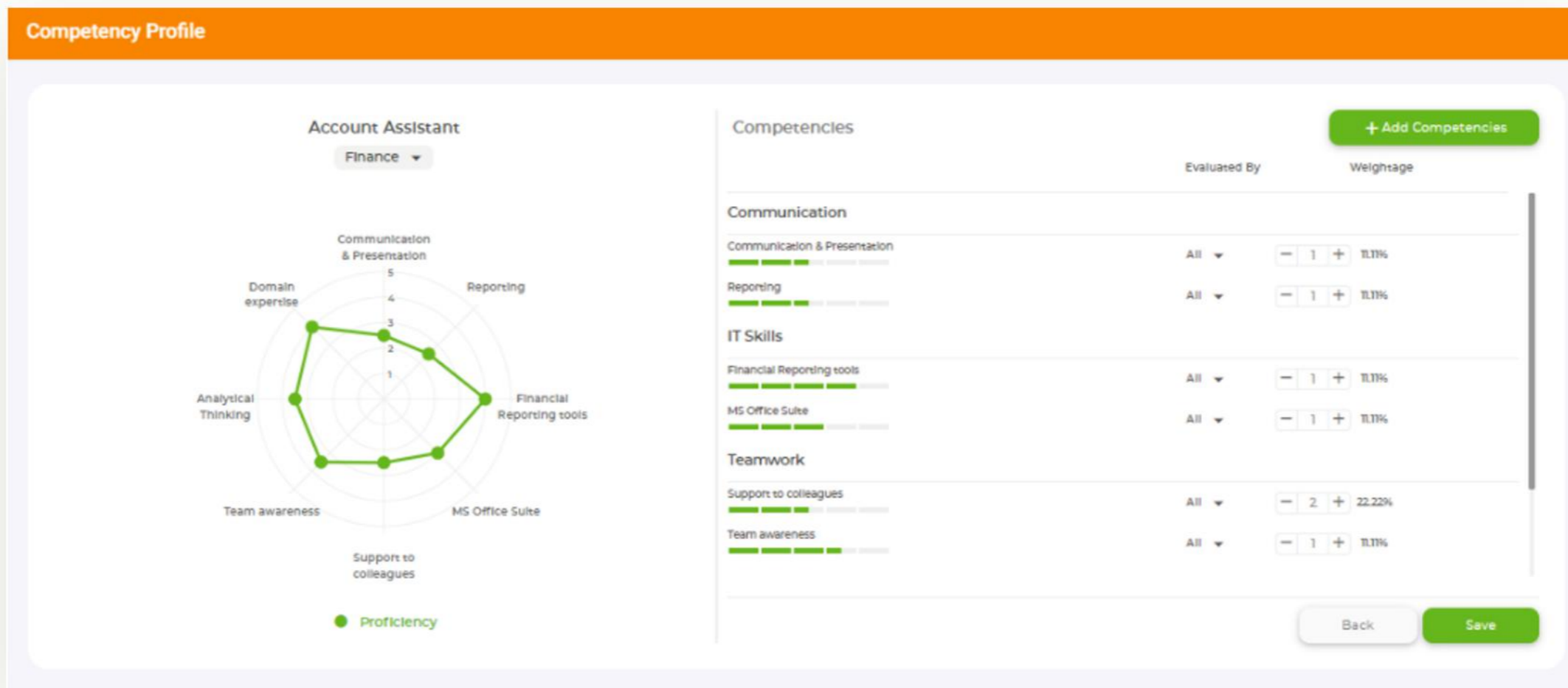
# Competency Profiling

## Competencies – Define & Map

Competencies define the skills, traits and attitudes for employees to effectively perform in their job roles. HR administrators can add and define competencies that are specific to job titles, teams, departments, and sub-units. These competencies will automatically be included in job appraisals and performance evaluations. With the **Competency Mapping** feature, you only need to enter competencies into the system one time allowing you to easily manage and assign competencies for appraisals - eliminating redundant manual entries.

## Competency Profiling

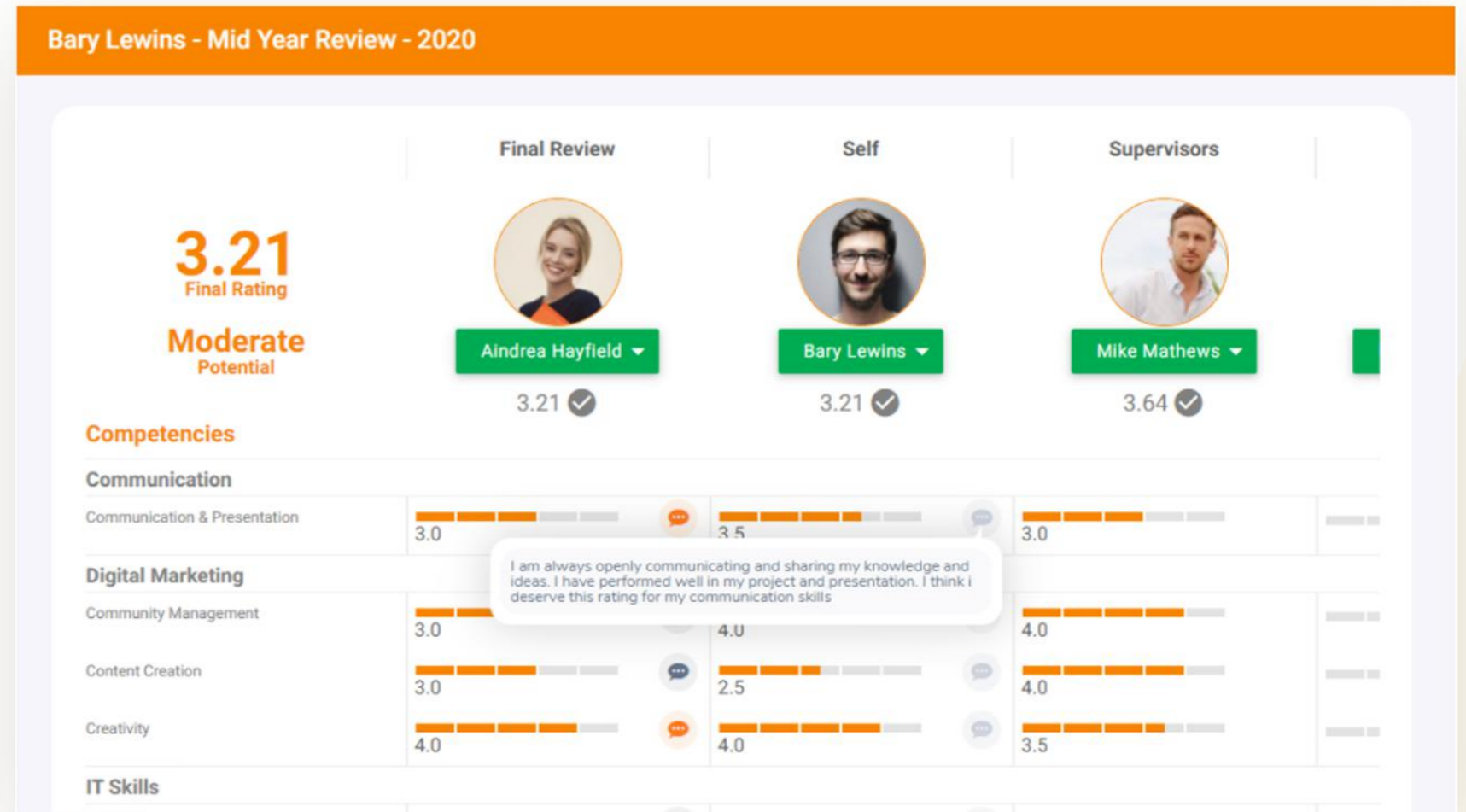
**Competency Profiling** helps you **identify** the competencies inherent to a specific job role (skills, knowledge, attitudes, behaviors). Weightings can be added to show the degree of proficiency required for each competency providing more focus on what is needed to drive success for the organization. Competency Profiling can also be used as a barometer to gauge employee performance as a whole, and identify those competencies driving success or where improvement is needed.





## 360 Degree Performance Appraisal

While direct supervisors play an important role in employee appraisals, feedback from others can provide comprehensive insights on total work performance. Peers, subordinates, clients (internal & external), and others that interact with the employee can provide valuable feedback assisting with the overall appraisal. In the Multiple View screen, 360-degree stakeholders can add valuable comments for the performance appraisal, including a “self-review” by the employee.





### Performance Trackers

Monitor employee performance trends and progress with historical comments tracking. These 360-degree comments can provide valuable insights for both current and future managers when tracking performance over time.



### Bulk Appraisal Creation

Need to create appraisal templates for teams, departments, or the entire company? With the **Bulk Appraisal** function, HR managers can quickly create templates specific to groups of employees.



### Automated Appraisal Alerts

Never miss an appraisal deadline again! With the **Email Notifications** feature, appraisal owners can subscribe to receive alerts on the progress and completion of the overall performance appraisal. For example, when a stakeholder submits feedback on an employee, the owner will receive an alert in their email inbox.



### Performance Reporting

Performance reports give you the insight you need to make the best decisions about your employees. Are they ready to take on more responsibility? Do they need additional training in a specific skillset?

These reports provide visibility into performance improvements over a given timeframe for managers and HR professionals. Using the **Performance Comparison** reports, managers can evaluate employee performance side-by-side when making important promotion decisions. Understanding performance strengths, weaknesses, ratings, and trending across employee groups is critical to manager and HR decision-making.



### E-Signature (service add-on)

E-signature integration provides electronic sign-off during the entire appraisal process between the appraisal owner and the employee. Once the appraisal process is complete, a final email notification is sent to the employee for acknowledgement via e-signature. E-signatures provide a valuable audit trail ensuring that both owner and employee have reviewed and acknowledged the appraisal. OrangeHRM integrates the e-signature feature with DocuSign and Onespan.



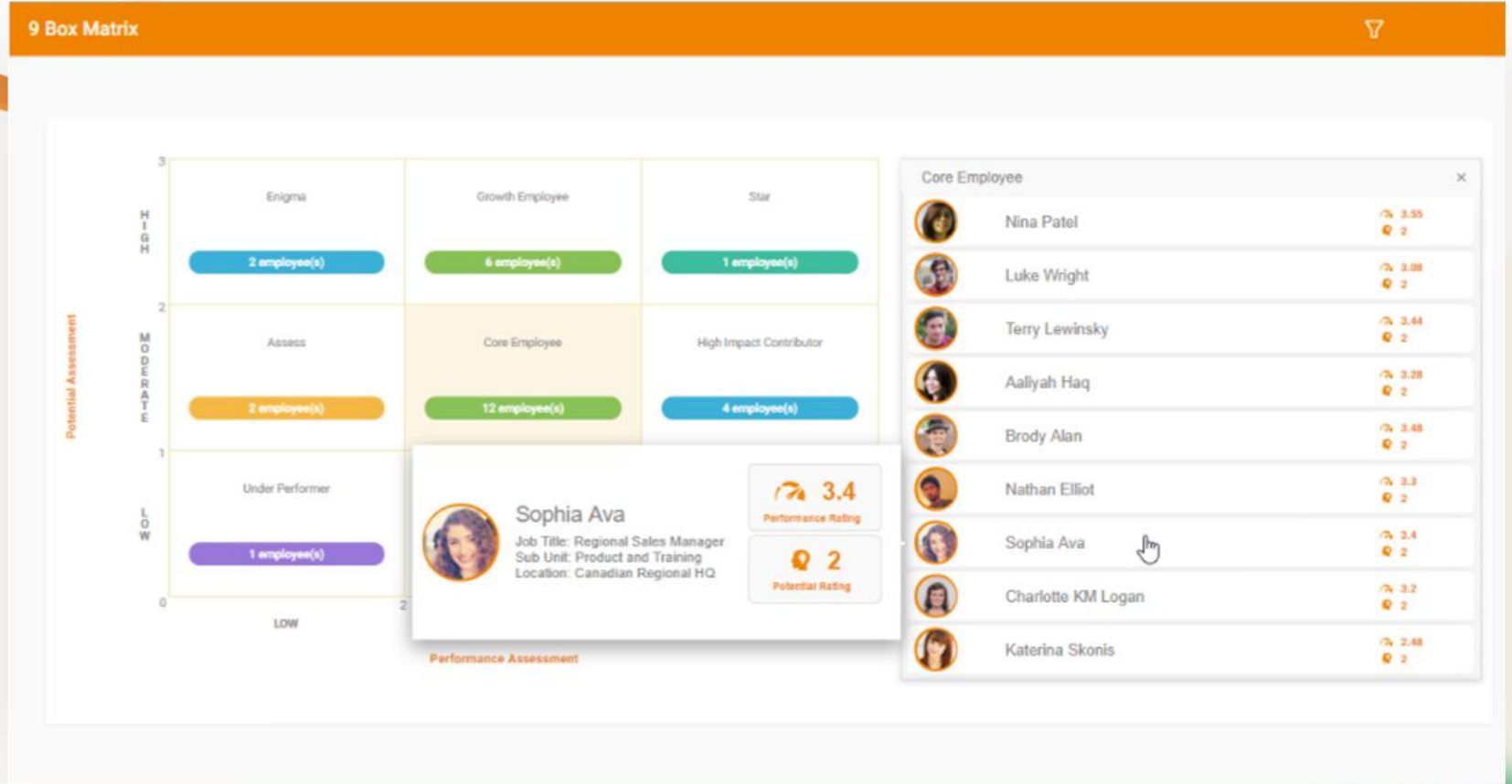
### Succession and Development

You've worked hard to attract and retain the best talent. Now, take it a step further with OrangeHRM's **Succession and Development**. By supporting the individual and professional growth of your people, you've committed to identifying and developing those employees with true "star potential". When you invest in employee development, you improve morale, productivity, and loyalty.

Succession and Development is a "separately licensed" module that can be paired with the Performance Management module (or used individually) to provide greater focus on strategic staff development.

## The 9 Box Matrix

This matrix tool helps management identify those employees with true star potential. The matrix has 2 axes, one on performance and one on potential. Through a series of measurement criteria, you can identify star employees that are ready for that next leadership opportunity. You can also identify those high performing employees that are growing in their future potential, that next set of stars.







Rachel Alexander  
Senior Audit Clerk

Development Plan

### Individual Development Goals

Current Role

***	Goal Name	Completion	Status	Due Date	Last Updated On
<input type="checkbox"/>	Participate in 3 training sessions on "ISO 45001:2018 Auditor Migration"	<div style="width: 67%;"><div>67%</div></div>	In Progress	2019-05-31	2019-09-23

Future Role

***	Goal Name	Completion	Status	Due Date	Last Updated On
<input type="checkbox"/>	Complete a Master of Business Administration (MBA) degree	<div style="width: 33%;"><div>33%</div></div>	In Progress	2021-01-01	2019-09-23
<input type="checkbox"/>	Acquire Certified Information Systems Auditor (CISA) certification	<div style="width: 50%;"><div>50%</div></div>	In Progress	2019-06-28	2019-09-23
<input type="checkbox"/>	Complete 30 Day Shadow Assignment with Isabelle	<div style="width: 100%;"><div>100%</div></div>	Achieved	2019-04-30	2019-09-23

## Individual Development Plan (IDP)

The IDP promotes the creation and tracking of individual development goals. These goals are focused on career development, and positioning the employee for job roles of greater responsibility and skillset. IDPs are a great mentoring tool for employees of all levels.



OrangeHRM

With 4+ million active users, OrangeHRM provides a complete and customizable HR solution that enables organizations to perform all HR operations with ease. An industry leader in human resource management, it's secure web-based software helps organizations manage their people, talent and HR processes across the globe.