Reviews in Talent Development

Contents

# Admin: Creating Review Question Templates

Question templates for Reviews are managed in **Reviews** > **Question templates** and will be an important part of launching your review.
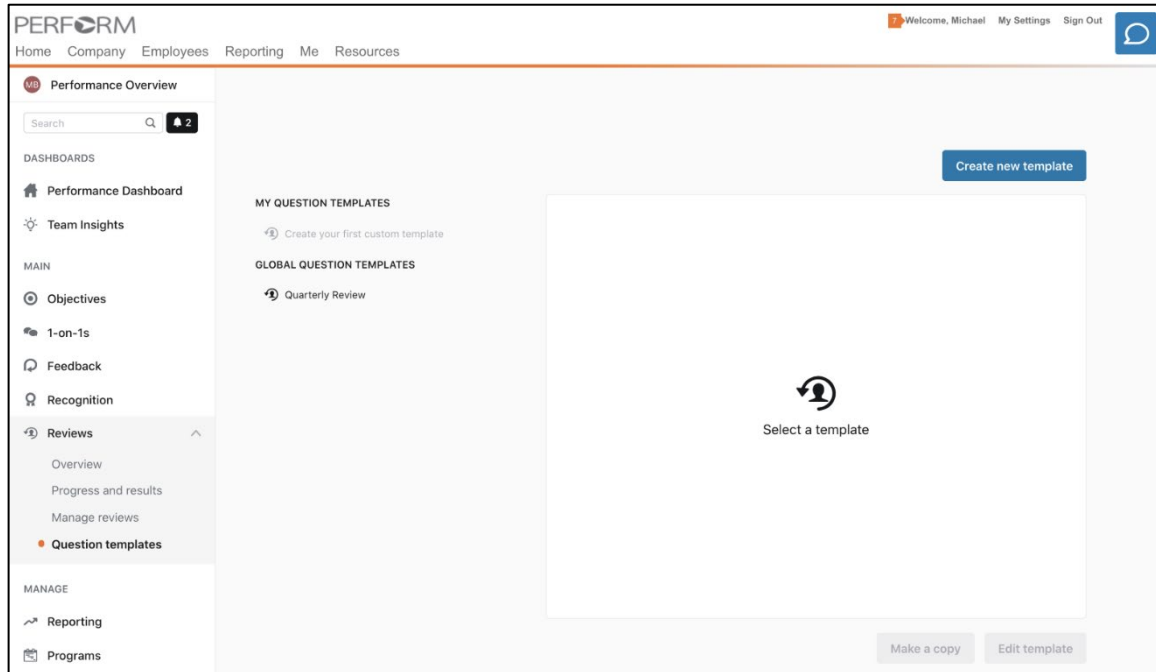
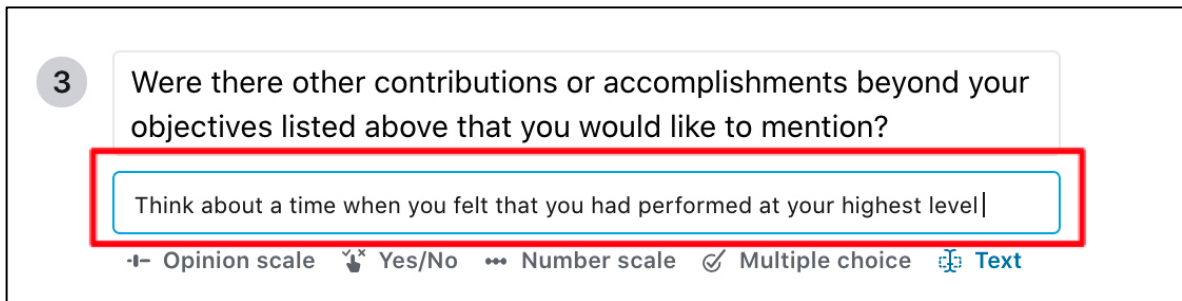Here you can edit existing templates or make a copy of existing templates and edit them.

QUESTION TYPES

When you are building out the questions in your Question Template, you have the flexibility to decide how to receive the inputs to your questions. We offer the following inputs:
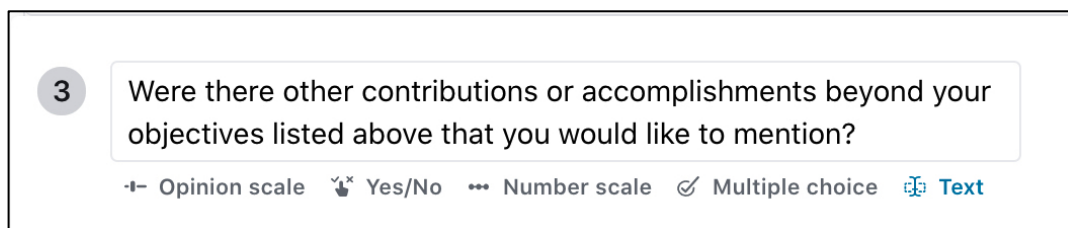
- Opinion scale (Rating)
- Yes/No
- Number scale
- Multiple choice
- Text (Single line/ Multi line)

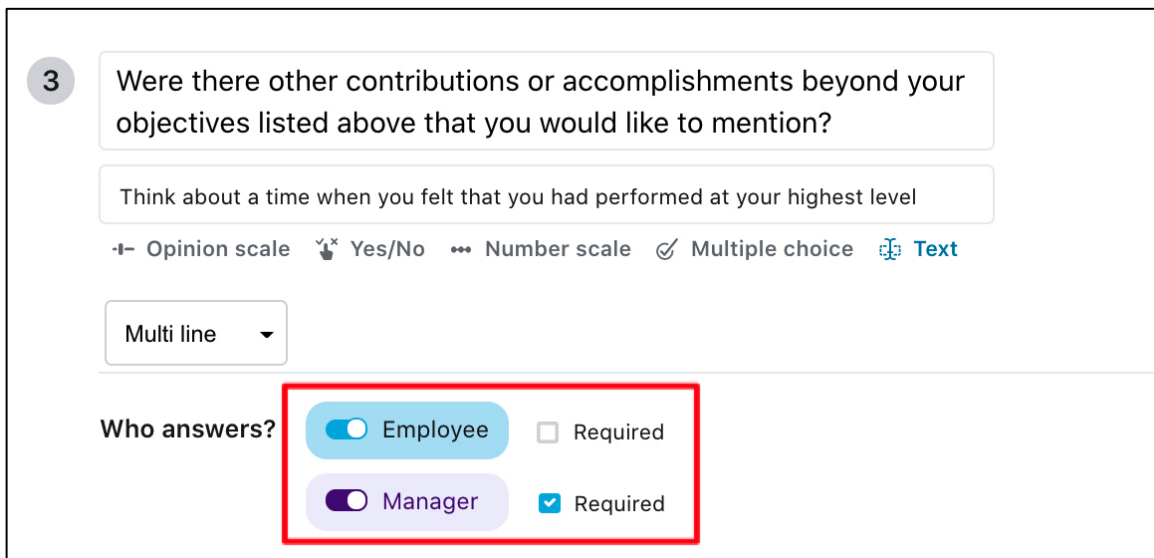You can also add descriptions to your questions for additional clarification.

You can select **who answers which questions**, if both your employee and manager are not answering the same set of questions.

You can denote **which questions are mandatory and mandatory to whom** (employee, manager or both).
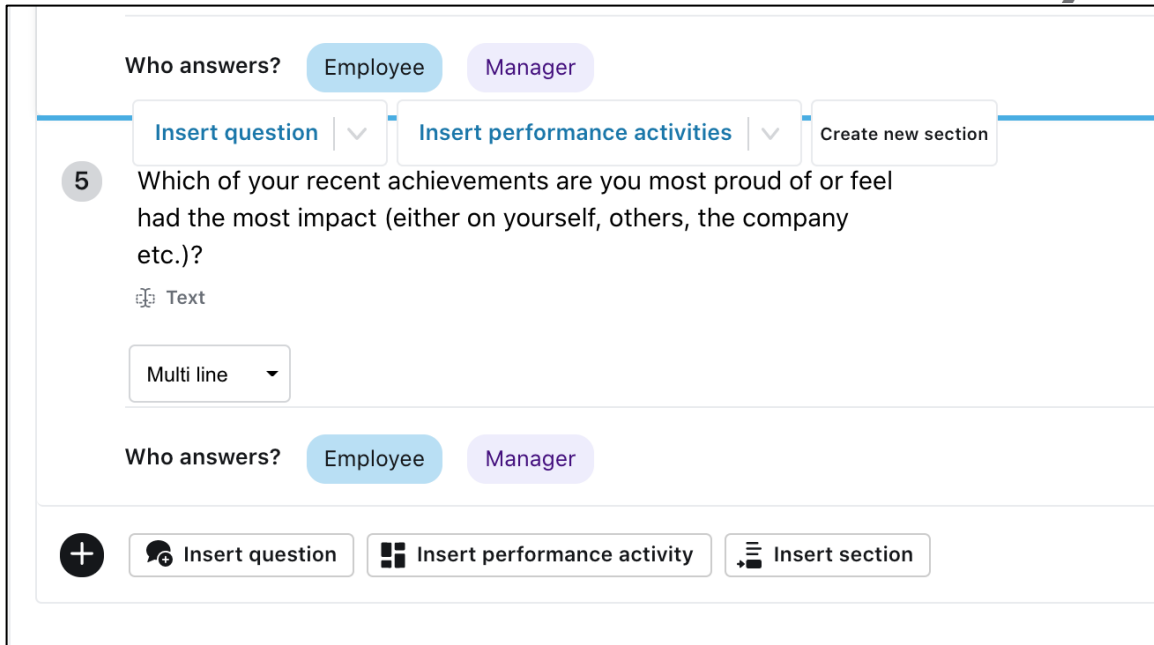
You can **insert new questions or sections** for questions by hovering over the edge of an existing question or at the bottom of an existing section.
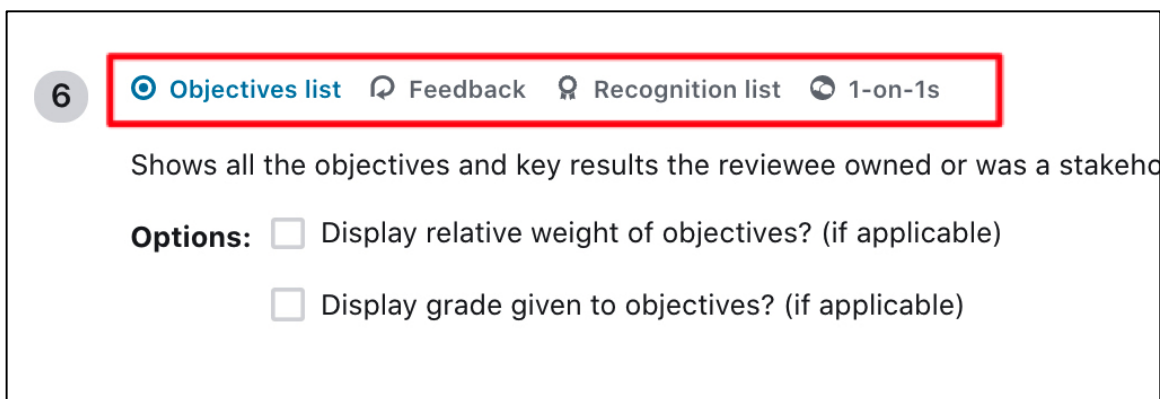
INSERTING PERFORMANCE ACTIVITIES

A performance activity is a widget where all your team member's performance activities (Objectives, 1-on-1s, Recognition, and Feedback) are pulled. You can select from the following to enhance your Review conversations and decisions:

Objectives, Feedback, Recognition list, 1-on-1s

Note: In the question template the performance activities will display dummy data. Real data will be pulled in once the review is launched.

For the Objectives list, you can select which columns to display in the Objective performance activity. You can also turn on showing the 'relative weight' of the Objective if you have weighted your goals.

Objectives you are an Owner or Stakeholder of will be pulled in to the Review as follows:

- Have a start date and due date that are contained within the review period

- Have no due date and are still open

- Have a start date somewhere in the review period and are closed

KRs can be viewed by clicking on the down arrow next to any objective.

FEEDBACK IN REVIEWS

Feedback requests will be pulling into the Feedback performance activity widget as follows:

- Feedback requests sent (aka created) during the review period

- 360 feedback requests (created using 'request feedback for others') about the target employee, where the compiled report was shared in the review period

- The visibility permissions of that specific feedback request. So if a manager can't see that feedback request because of the permissions set, the feedback doesn't appear for the manager in the list when they are filling out the employee's review, but it would show for the employee themselves.

Admins can also choose to setup a section of the Review, Private manager-only questions, for managers to add their thoughts regarding retainment strategies or long-term career planning. These comments can never be seen by the employees.
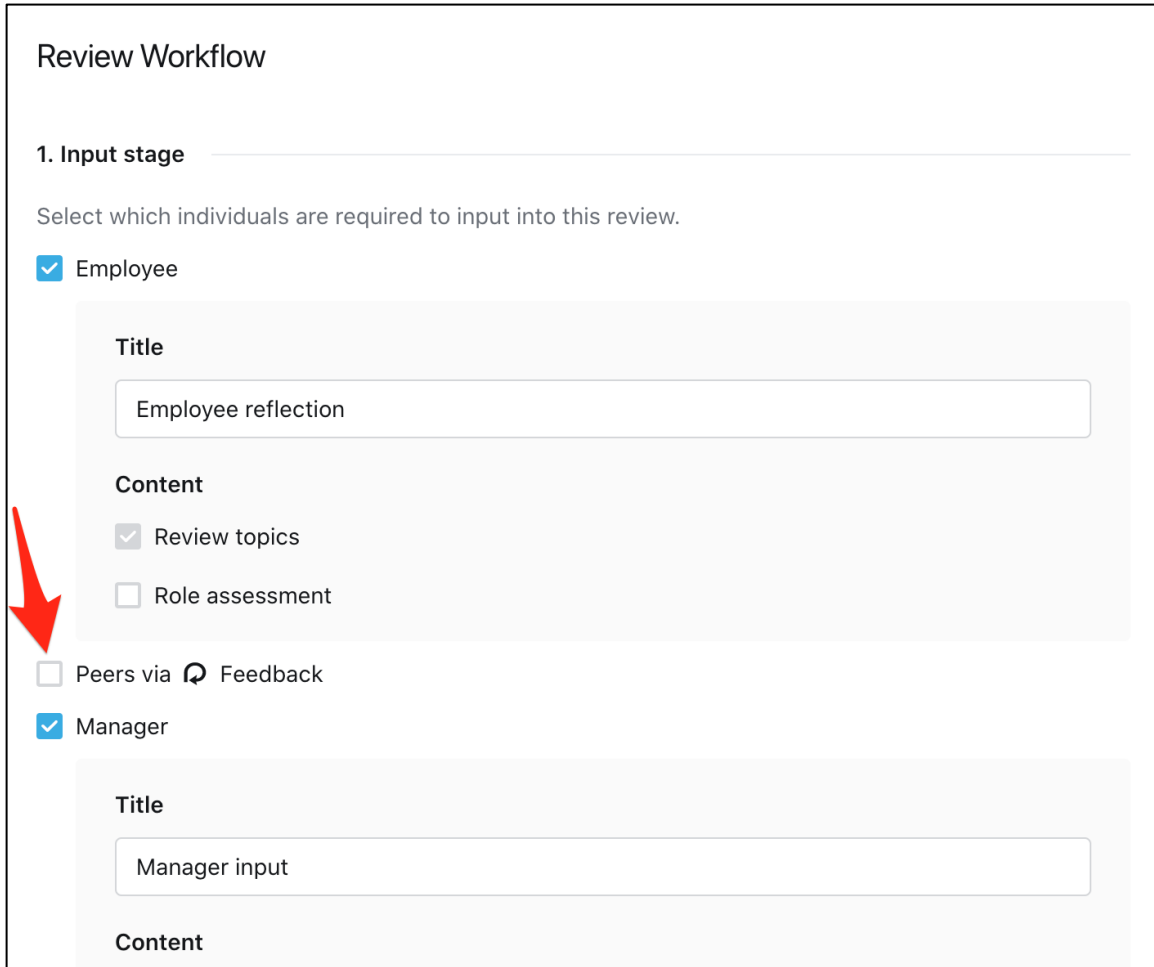
Admin: Setting Up Peer Feedback in Reviews

Review creators can choose to add peer feedback directly into their review. This allows managers to get a new form of context - the perspective of peers - when they have performance or growth conversations with their direct reports.

To include peer feedback as part of the review, ensure that you select the **Peers Via Feedback** checkbox in the Review Launcher

Once clicked, the Peer Feedback options include:

- **Title**: The title of the Peer Review step. This will manifest throughout the process so be sure to choose a name that will be clear to employees.

- **Nomination Settings**: Managers will need to nominate peers for their direct reports. See the Nomination Step section for full details.

- **Template**: Choose a template and the questions that peers will respond to. This template will come from the Feedback feature.

- **Response Deadline**: This is a hard deadline - feedback will not be accepted after this date.

- **How should peer feedback be shared with the employee?** Choose whether managers should compile a report for their direct report with the answers from their peers or if the feedback should not be shared. If it is not shared then the manager would be expected to incorporate the peer feedback into their responses to the review.

- **Anonymity**: Choose whether peers are identified or not

Input your Peer Feedback Title, Nomination Step Title and provide nomination instructions to your managers.

Input settings

⚠ Please choose a template   [Choose template...]

Response deadline

[Mar 02, 2021   📅]

How should peer feedback be shared with the employee?

🔘 Manager compiles feedback into a report which is shared when the review is finalized (recommended)

⭕ Peer feedback is not shared with the employee

Anonymity

⭕ Peers are always anonymous

⭕ Peers are identified to everyone, except the employee

🔘 Peers are identified to everyone, including the employee (recommended)

Next, determine the **Input Settings**, such as which Feedback template to use, what the response deadline is for peers, how peer feedback will be shared with the employee, and what anonymity the feedback will have.

Admin: Setting Up and Launching Reviews

A supporting article to assist you with set up and review launch can be found here.

Start by going to **Reviews** > **Launch new review** on the **Overview** page

In the first area, you create a title for your Review and determine the Review Period (the time period you are reflecting upon as a company). This will pull in employee Objectives, 1-on-1s, Feedback, and Recognition data automatically into each employee's review, related to the Review Period you selected (though as an Admin you can choose not to show this data in Reviews when building Question Templates).

SELECT YOUR PARTICIPANTS

You can include/exclude everyone, departments and individual team members.

You can also include/exclude people by their hire dates. This will be based on your HRIS settings.

You may receive a warning that some employees don't have a manager or skip level manager assigned. Click Review and assign to manually select these.

Export the participant list, in order to check all participants are accurate prior to launching. You will be emailed with a CSV file.

SELECT A QUESTION TEMPLATE

Select a question template. If you need help creating a question template, follow the steps in this article.

Questions

Question template *
Choose template with the questions participants will respond to in this Review.

Quarterly Reflection   ✕ ▾   👁 Preview

9	5	0	5
Shared Questions	Employee Questions	Manager Questions	Private manager questions

SELECT YOUR REVIEW STAGES

Input Stage: The input stage lets you select or deselect the Employee and Manager stages as well as rename them.

Review Workflow

1. Input stage

Select which individuals are required to input into this review.

☑ Employee

Title

Employee reflection

Content
☑ Review topics
☐ Role assessment ⓘ

☑ Manager

Title

Manager input

Content
☑ Review topics
☐ Role assessment ⓘ
☐ Talent attributes ⓘ

When can managers enter their responses?   Learn more
⦿ Parallel
  Employees and managers start and submit their responses independently.
◯ Series
  Managers respond after the employee submits their answers.

When can mangers enter their responses?

You can allow managers to begin their input into their direct report's review in parallel or sequentially.

When parallel is chosen, both employees and managers can start and submit their responses immediately after the review is launched. When sequential is chosen, the manager can only begin responding after the employee submits their answers.

Approval Stage: The Approval Stage gives options for approval stages during the review.

For the optional Managers' manager (skip-level) Approval stage, if an employee does not have a skip-level manager assigned once the review is launched, the only person who can move their review forward is an Admin.

For the optional Admin Approval stage if an employee has no specific Admin assigned to them when the review is launched, any network admin with content access will be able to check the Review and move it forward to the next stage.
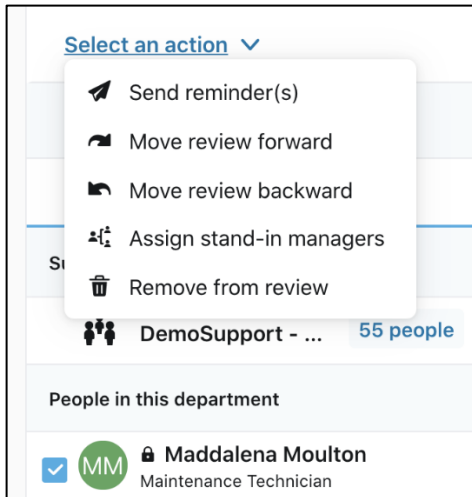
For admins to receive a notification that they have a review to approve, you must select an admin to be assigned to this stage when launching a new review. If no specific admin is assigned, all admins will receive home cards and notifications for all reviews that need admin approval.

You are also able as an admin in this stage, to send the review back with comments by clicking into the review itself and scrolling all the way to the bottom. You will see the ability to send the review back to either manager or employee input stage and add comments as to what changes you want that person to make.

Delivery Stage - 1-on-1 Discussion

For the 1-on-1 discussion stage, select which 1-on-1 template you want to attach to the review. Go directly to the 1-on-1 feature if you want to edit or create a 1-on-1 template.

If there is no 1-on-1 stage in your Review, the review will automatically be shared with the employee after the last applicable stage (e.g. admin approval or skip-level approval).

When and how is the finalized review shared with the employee

We recommend allowing the manager to decide when to share the employee's completed review with them. This is best practice as for any sensitive performance reviews, managers may choose not to share the review before the 1-on-1 meeting and want to discuss it in-person first. When scheduling the 1-on-1 reviews meeting, managers have the option to either share the review before or after the 1-on-1 meeting.

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3. Delivery stage

Select which steps are required to discuss and finalize the review.

☑ 1-on-1 between the employee and their manager to discuss the review

Title

| 1-on-1 discussion |

1-on-1 template

⚠ Please choose a template [Choose template...]

When and how is the finalized review shared with the employee   Learn more

🔘 Managers decide when to share the review with the employee (recommended)

⭕ Always share review with employee before 1-on-1 meeting

⭕ Always share review with employee after 1-on-1 meeting is finalized

Can participants edit review inputs during or after 1-on-1?   Learn more

⭕ Yes, participants can edit review inputs during and after the 1-on-1

🔘 No, participants can't edit review inputs during and after the 1-on-1 (recommended)

As an admin, you can change this setting globally so that all employee reviews are always shared with them before the 1-on-1 meeting with their manager, or always shared with them after the 1-on-1 meeting.

Can participants edit reviews inputs during or after 1-on-1?

We recommend not allowing participants to edit their review input during and after the 1-on-1. This helps keep consistent information and avoids accidentally changes.

By default, the employee, direct manager and admins with content access can see responses. You can turn on/off whether an employee's management tree has visibility to review responses as well.

You may also choose when an employee's response is revealed to the manager. You may choose immediately after the employee submits their response, at the end of the input stage or at the end of the approval stage.

SAVE A DRAFT AND LAUNCH A REVIEW

Verify your Review title, Review Period Dates, Participants, and template options are as you would like them. If you see a message about participants being unable to complete their review due to not having managers or skip level managers, Review and assign the managers here:

Periodically click **Save as draft** and when you are ready, click **Launch review process**!

Note: Only the creator of a review draft can edit and continue with that same draft. We currently do not support multiple users editing the same draft.
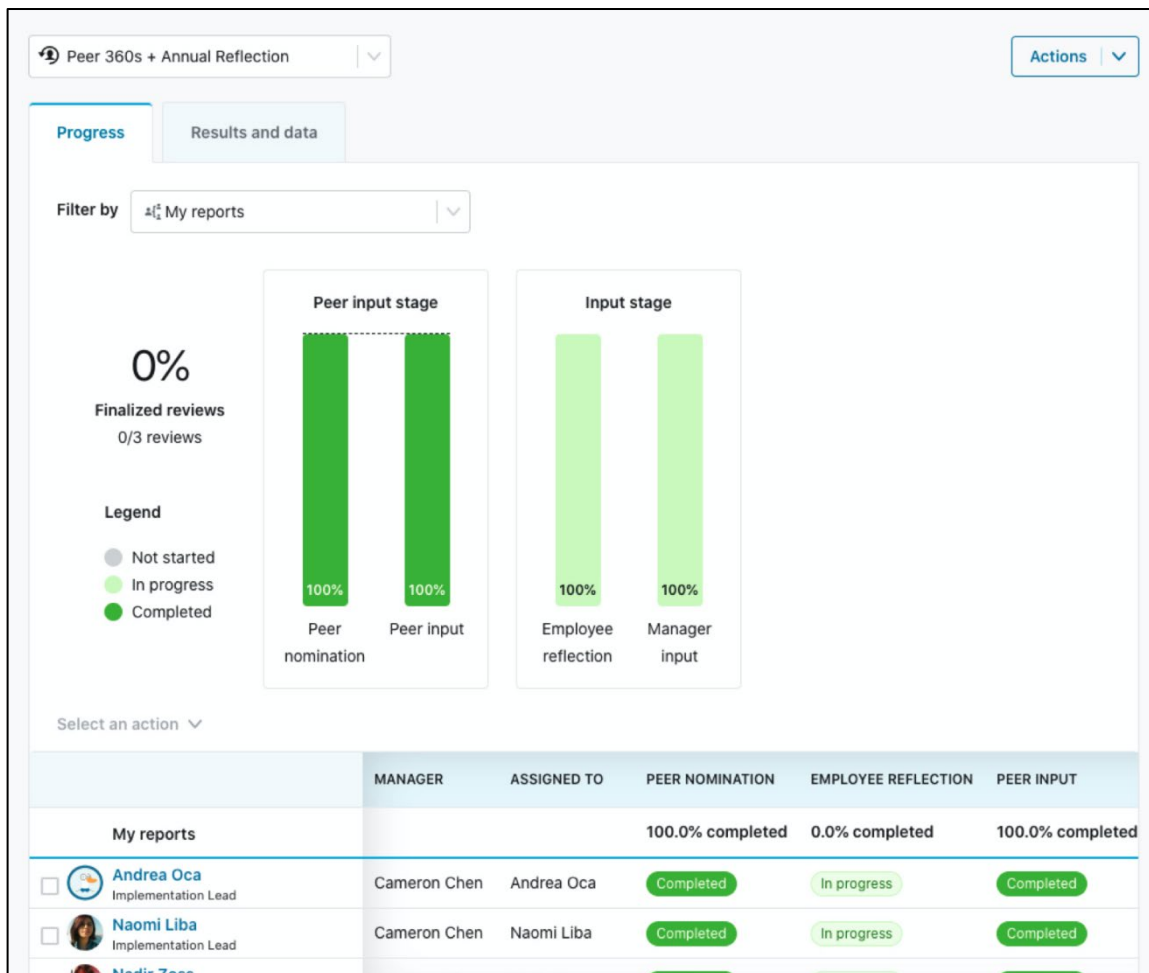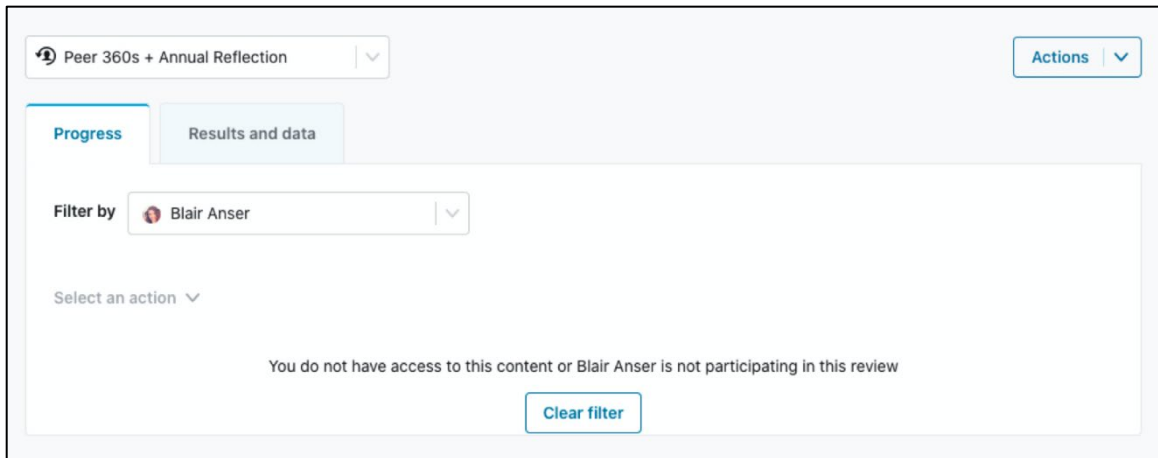
Admin: Progress and results

Progress and Results Tab

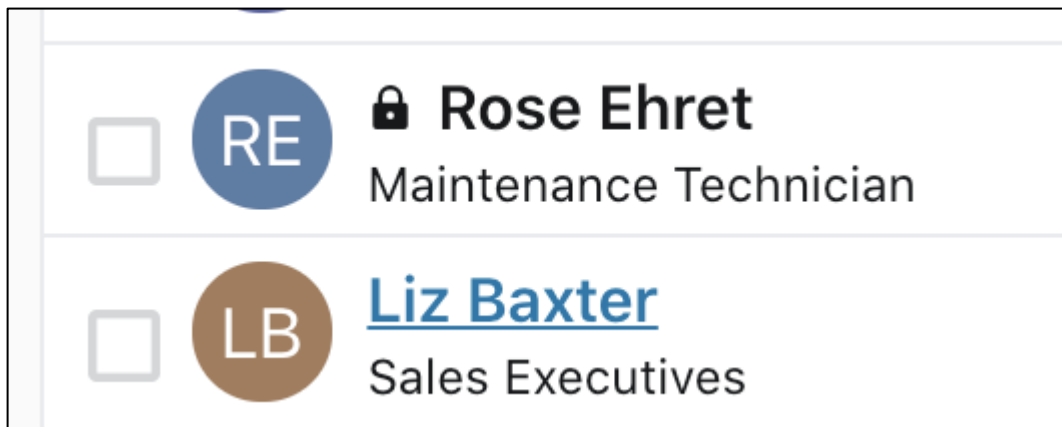This is the best place to get a full overview of what's happening with all of your reviews.

 As an admin, your Filter by will be the organization; you can filter by My reports, individual people or a department.

If you filter for a result that you do not have permissions to view, you'll get this message:

Reviews you do have content access for will be highlighted in blue:


Click on the name of a person to be taken to their individual review.

You can also select a person(s) and use the **Select an action** dropdown menu to perform additional actions such as:
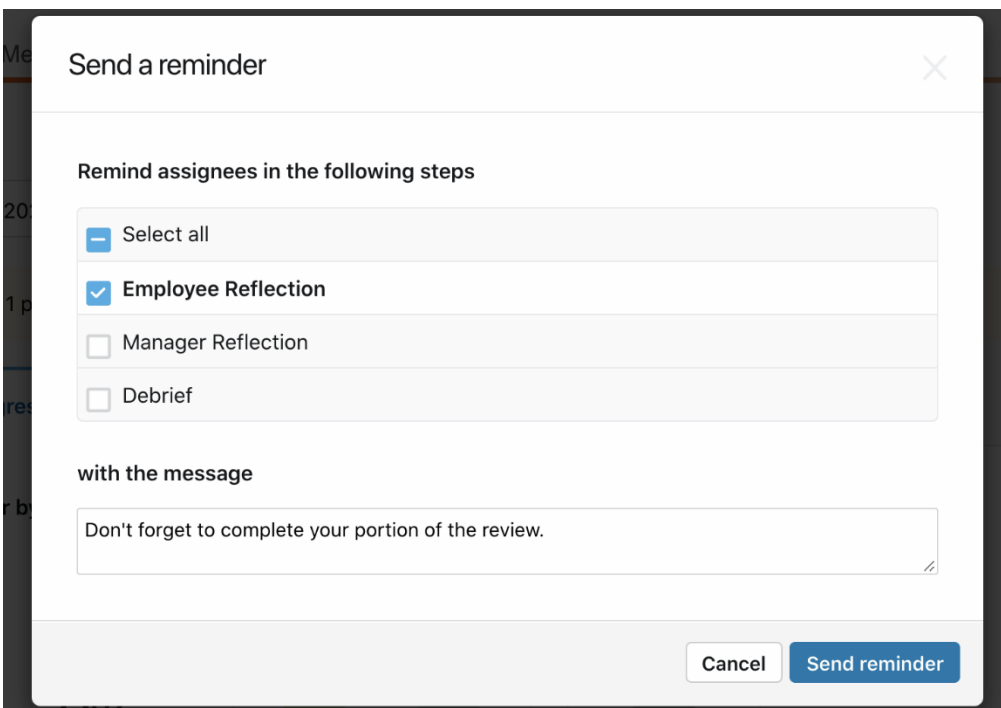
- Sending a reminder

- Moving the review forward or backward a stage

- Assigning a stand-in manager

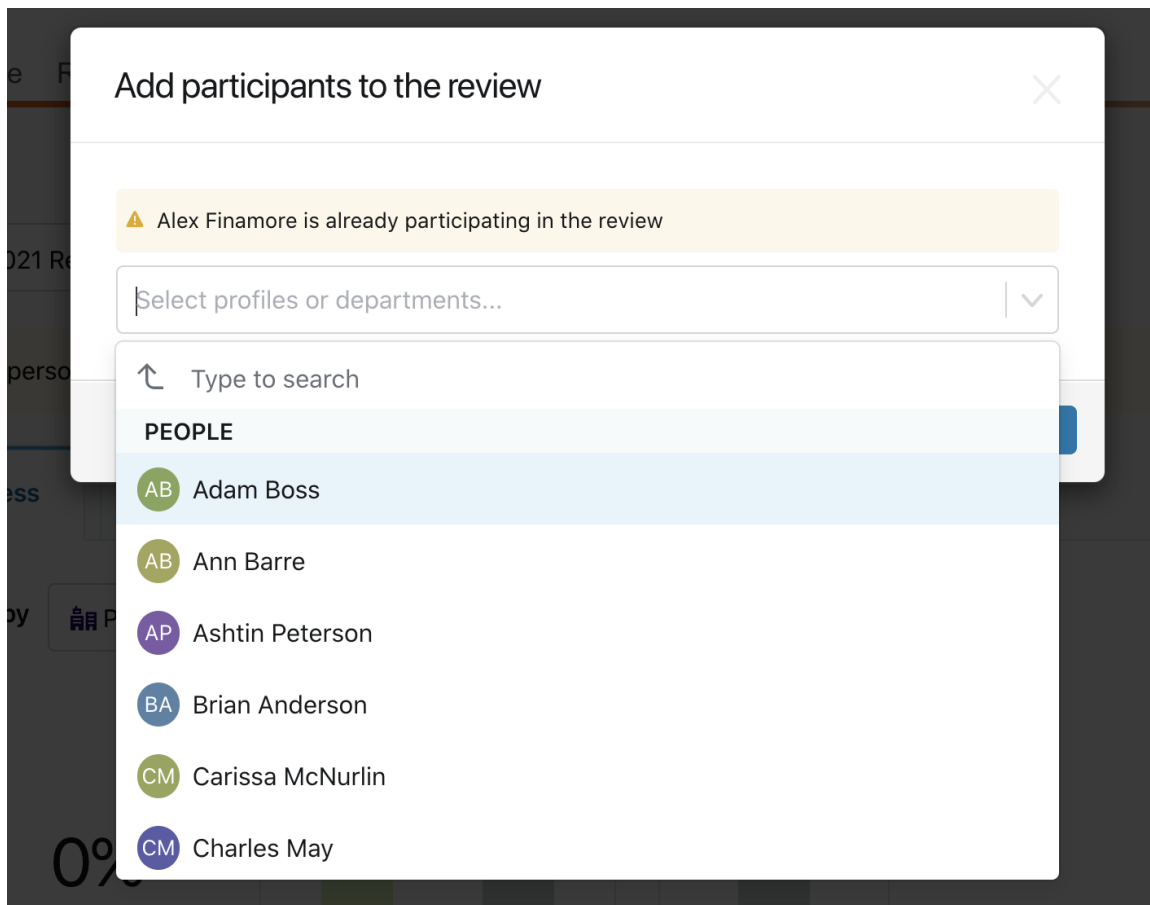- Remove that team member from the review
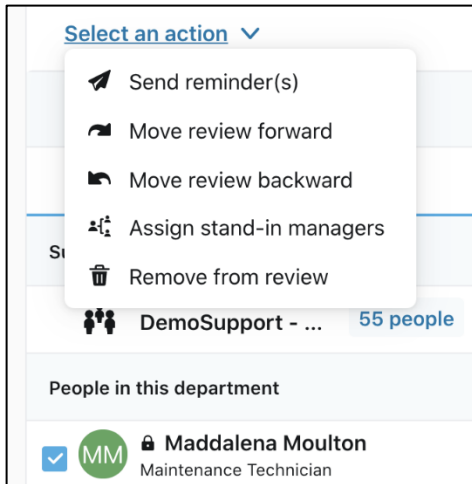
You can action other functions on the Progress and result tab by clicking on **Actions** in the top right corner:
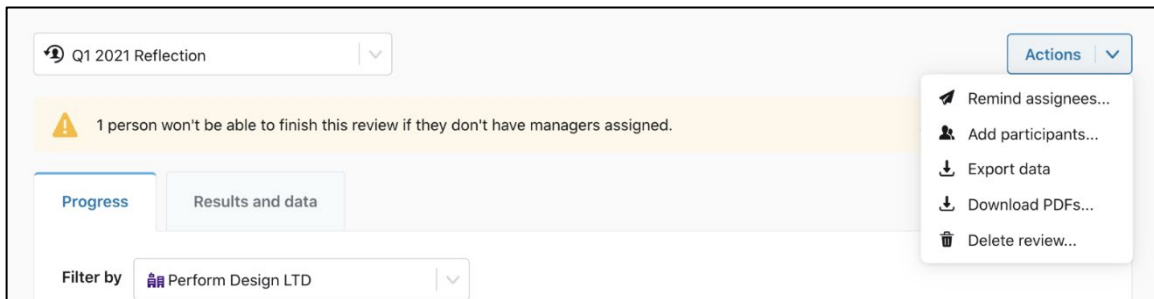
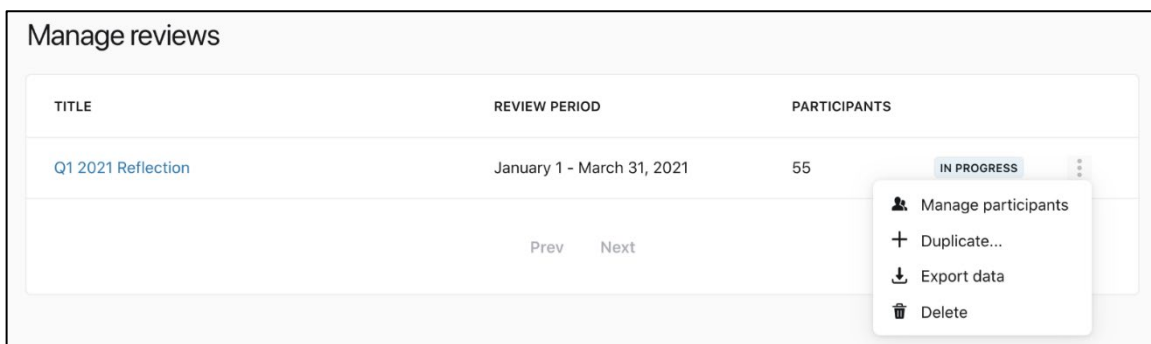You can remind assignees in different stages of the review:

Add participants:

You can export reviews data via csv (an email will be sent to you with a link to download) or export the reviews as PDF.

Last up, you can delete a review all together.

Admin: Manage Reviews

This tab provides admins the ability to Manage review participants, duplicate a past review, export data and/or delete a launched review. Drafted reviews will also appear here.

When Managing participants, admins can reassign managers, skip-managers and admins in bulk or ad hoc ad needed.

When duplicating a review, you will be prompted to name your duplication and confirm your review settings. This copy will now be in draft status for you to continue working on.

Exporting data will provide you with an email to download your reviews data (your content access will apply here);
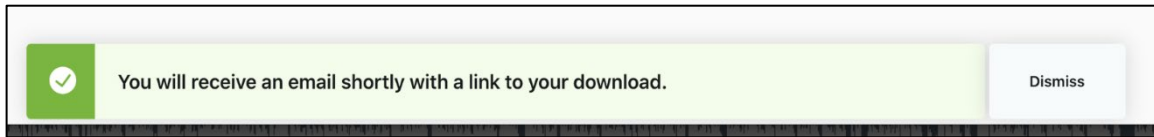
Deleting a review will remove the active review and any data associated with it: