

# The Performance Culture System™

## Launch Checklist

Welcome to Performance Culture! We are thrilled to support your organization in building a Performance Culture. We have created a quick Account Setup Checklist to help you get started.

### Account Settings - Customization

We have several customization options to consider. If you are unsure about the customizations, don't worry. We have defaulted these settings for you. Keep in mind, these settings will apply to your whole account.

#### Custom Performance Values Matrix X Axis Label

You don't have to call them Workplace Behaviors just because we do. You can select from many options to tailor the X Axis for your organization.

- Code of Conduct
- Competencies
- Core Values
- Guiding Principles
- Workplace Behaviors



#### Custom Star Definitions

Star ratings for both the objectives and the behaviors are used for the dot placement on the Performance Values Matrix. Use our standard definitions or customize these for your organization.

3 Stars: Satisfactory – Competent and dependable level of performance. Meets expectations.

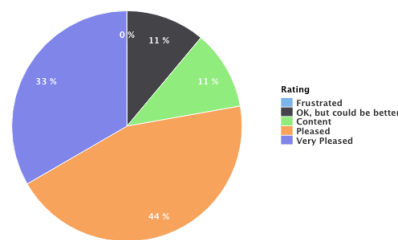
*Tip: Make sure your custom definitions will support the grid placement.*



#### Custom Workplace Ratings

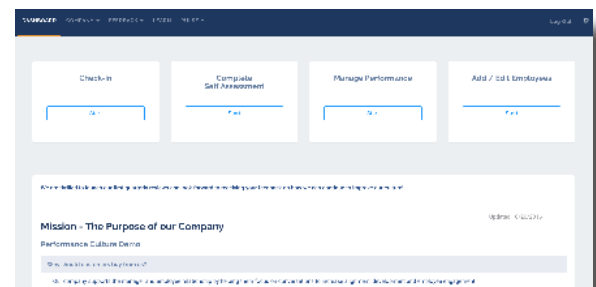
Each employee has the ability to rate their workplace satisfaction for every review cycle. Our default options can be customized for your organization. This affects the Workplace Satisfaction Reports and Response summary.

- Very Pleased
- Pleased
- Content
- OK, but could be better
- Frustrated



#### Custom Dashboard Message

The Dashboard is the landing page for all employees every time they login to your Performance Culture account. In addition to the Quick links and the Mission of your organization, you have the ability to share a custom message. You can use this dashboard message to communicate with all users and update the message as needed.



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### Account Settings - Disabling Features

There are several options to enable or hide features and / or components on an account level. While many clients are thrilled to have many features, we give you control over when to implement them with your team.

- Allow Managers to Add / Edit Employees
- Hide 360 Internal Feedback
- Hide 360 Client Feedback
- Hide Performance Objectives on 360 Internal Feedback
- Hide Learn
- Hide Check-Ins
- Hide Performance Ratings & Performance Values Matrix

### Account Settings - Email Notifications

Enable system email reminders for when reviews are almost due and/or past due. Choose how many days before and after the review due date.

Be sure to choose a Due Date for each Review. If a Review does not have a Due Date - no emails will be sent regarding that review.

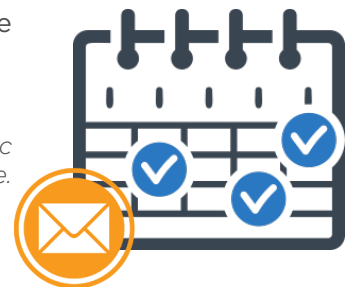
#### Before - 3, 5 or 10 Days

- Employees will receive an email reminder to make final comments and complete their self assessment.
- Managers will receive an email reminder to make final comments, complete their evaluations and schedule the 1 on 1 coaching session.

#### After - 3, 5 or 10 Days

- Managers will receive an email reminder that the review is past due and to complete their evaluation and schedule the 1 on 1 coaching session.

*You can also send a one-off email reminder to specific team members from the Team Review table.*



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### Tips for Organizing Your Data

We have a few tips to consider when setting up your account and organizing your data. Many clients have multiple departments and even multiple locations. Below are a few tips:

#### People - organizing your users

For accounts with multiple office locations, adding a prefix to the department assignment can help you when filtering users and team reviews, check-ins and more.

#### Prefix Examples

- GA - Accounts Payable
- GA - Accounts Receivable
- NC - Customer Service Rep
- NC - Sales Consultant
- SC - Customer Service Rep
- TX - Sales Consultant
- TX - Sales Consultant
- Remote - Surveyor

#### Performance Objective Prefix

When creating your performance objective library it can be helpful to assign a prefix. Adding a prefix allows you to quickly search, filter and review your objective library to ensure you add, edit and / or delete as needed.

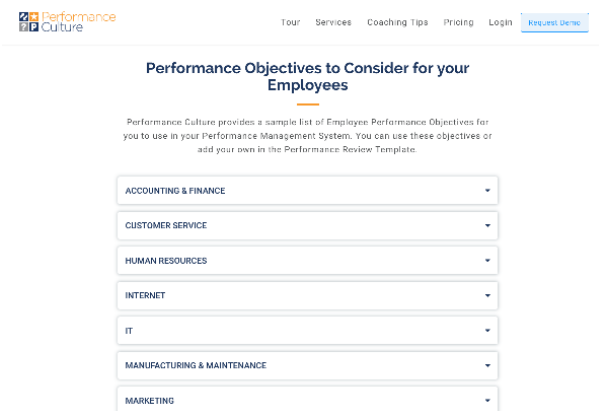
#### Prefix Examples

- Accounting - Percentage of overdue invoices (%)
- Accounting - Percentage of past due accounts payables to total accounts payables (%)
- Human Resources - Average open time of job positions (Time)
- Human Resources - Average training costs per employee (Dollar)
- Sales - Percentage of returning customers (%)
- Sales - Customer Retention Rate (%)

You may also consider using a role / position or tiered positions (i.e. Junior, Senior Consultant) as a prefix.

Don't forget, we also offer a Performance Objective Sample Library on our website to help you get started.

[Visit PerformanceCulture.com](https://PerformanceCulture.com) - Coaching Tips



# The Performance Culture System™

## Performance Review Launch Checklist

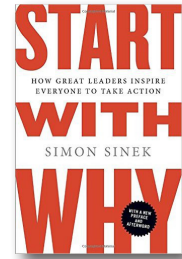
Congratulations on completing Manager Training: Part I.

Use this checklist to help you launch Performance Culture for your organization.

### Company > Purpose

- Mission - create the Mission of your organization.
- Vision - create the Vision of your organization.
- Goals - add Goals and Critical Success Factors.

*Not sure about your Mission or Vision? Use our template questions to guide you through the creation process.*



*Recommended reading to further assist in creating your mission and vision.*

### Company > People

- Add / Upload Job Descriptions (this can be done after launch).
- Edit each employee to assign Manager, Job Description and upload Behavioral Profile (if available).

### Feedback > Performance

- Add / Edit Performance Objectives to create your organization's library of objectives.
- Add / Edit Workplace Behaviors to create your organization's library of behaviors.
- Add Current Reviews per role/position.
  - Assign the employee, and review cycle.
  - Assign up to 5 performance objectives.
  - Assign up to 10 workplace behaviors.
  - Include Custom Questions (optional).
- Schedule initial 1 on 1 Meeting with Employee (15 - 20 minutes).

Once current reviews are built, managers are ready to have the initial 1 on 1 Meeting with each employee.

### 1 on 1 Initial Meeting

- Review Performance Objectives.
- Review Workplace Behaviors.
- Discuss any questions to ensure alignment.
- Discuss employee's Personal Goals and Professional Development Objectives (update current review).

## Weekly Touchpoints, Comments and Coaching Notes

Now that you have launched Performance Culture, Reviews will remain Current and without scores until the end of the review cycle.

**Weekly Touchpoints** - we recommend managers meet with employees for 5 - 10 minutes per week to review accomplishments, priorities and how they can help. (Check-Ins are great for to stay focused.)

**Employee Comments** - encourage employees to login throughout the cycle and make comments about their progress on their current review.

**Coaching Notes** - we recommend managers login throughout the cycle and make coaching notes about the employee's progress on the employee's current review.

**Manager Training: Part II** will be hosted 2-3 weeks prior to the end of your 1st review cycle. This training will include the recommended review conversation process and best practices for evaluating employees and having an effective coaching conversation.