2021

TalentPeak™ Appraisee Comprehensive Reference Guide

TalentPeak

Insights For Performance LLC &

TalentPeak™

1/1/2021

Table of Contents

6000 Fairview Road, South Park Towers Charlotte NC 28210
www.talent-peak.com & User Support

PDF Guide Last Updated: 2019

The Online Searchable Knowledge Base is undergoing migration to new platform & will be relaunched 1st quarter of 2021 – it will be visible to you here by clicking on the “Knowledge Base” Button. (Currently links to website hidden pages)

The information in the **APPRAISEE COMPREHENSIVE REFERENCE GUIDE** covers the TalentPeak™ core performance management system and **all** additional modules and systems for employees as Appraisees.
To get the hyperlinks in this User Guide to work, you will need **Adobe Reader**
Download it for free from: **www.adobe.com**

For easier navigation, please use the Table of Contents with hyperlinks to navigate to specific topics when questions arrive. The Adobe View pane if enabled will keep the thumbnails open for easier viewing & navigation; and the built in Adobe “search” function, to obtain answers to your questions using key words search, or to quickly get to the desired referenced section.

(In Adobe, at the top left, Click on VIEW>>SHOW/ HIDE >>NAVIGATION PANE>>THUMBNAILS)

Fact Note: TalentPeak™ is written in International English Spelling to enable a globally acceptable format

TalentPeak™ Our Go Green Initiative
We are continuously improving!
Because of this commitment to our users, we undergo frequent system and feature updates.
The benefit is a more efficient TalentPeak™ and richer experience for you.
Our User Guides are in downloadable PDF format and are updated frequently with every new release.
Please save this as a PDF and carefully consider before deciding to print. Thank you!

thinkbeforeprinting.org
Please consider the environment before printing

TalentPeak™ Video Link & Information

Figure 1 Click to View

View the "Appraisee Launch My TalentPeak" Video: https://www.talent-peak.com/appraisee/
(OR View Here: https://ispri.ng/chkF)

Logging into the system for the first time

Your Corporate System Administrator (CorpAdmin in short) or Divisional System Administrator (DivAdmin) will let you know when you should log into the system for the first time.

On the **TalentPeak™ Website** - Click on the **TalentPeak™ Login** Navigation Tab **or the TalentPeak™ Logo on any page.** It will take you to the system login page.

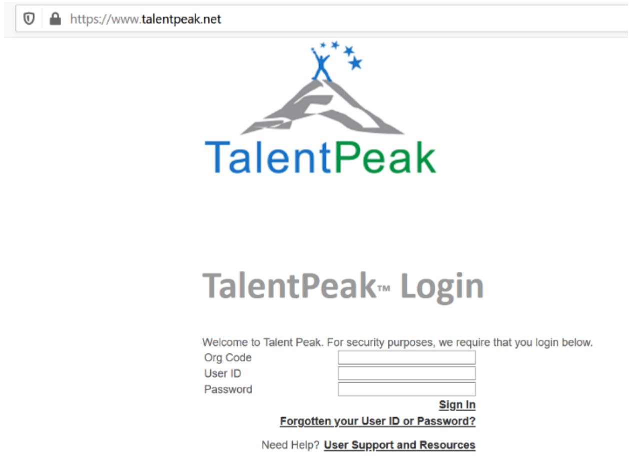
Next, click "Forgotten your User ID or Password?" Follow the onscreen instructions. You will be required to enter your work email address.

Within a few minutes your temporary User ID and Password will be sent to that email address. Check your email, spam filters, and junk files for this email. If it comes to your spam/junk folder – please be sure to mark it as NOT Spam so that you can receive the system emails in your regular email inbox.

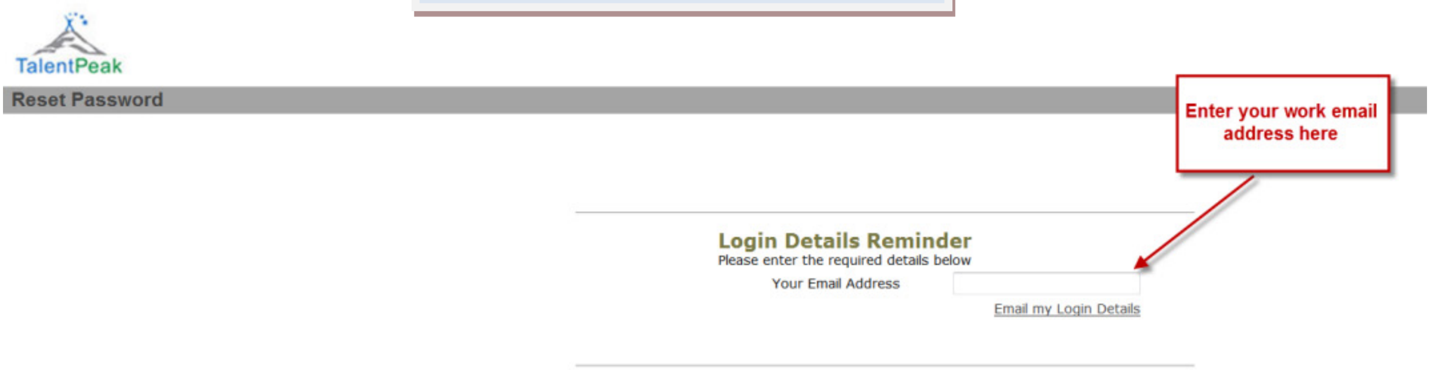
Please log into the system with the User ID & Temporary Password the first time. (The Org Code is the same for all employees in your organization. Please get it from your HR Administrator or your supervisor/manager if you did not have it.)

6000 Fairview Road, South Park Towers Charlotte NC 28210
www.talent-peak.com & User Support

Step # 1 Click on “Forgot User ID”



Step # 2 Enter your email address



Step # 3 Check your email for the temporary password

Check your email for the temporary password & ID sent to you – log on with those the first time.

IMPORTANT: If you share a common computer with some of your colleagues, DO NOT follow the above procedure, as your CorpAdmin or DivAdmin will give you your User ID and Password verbally.

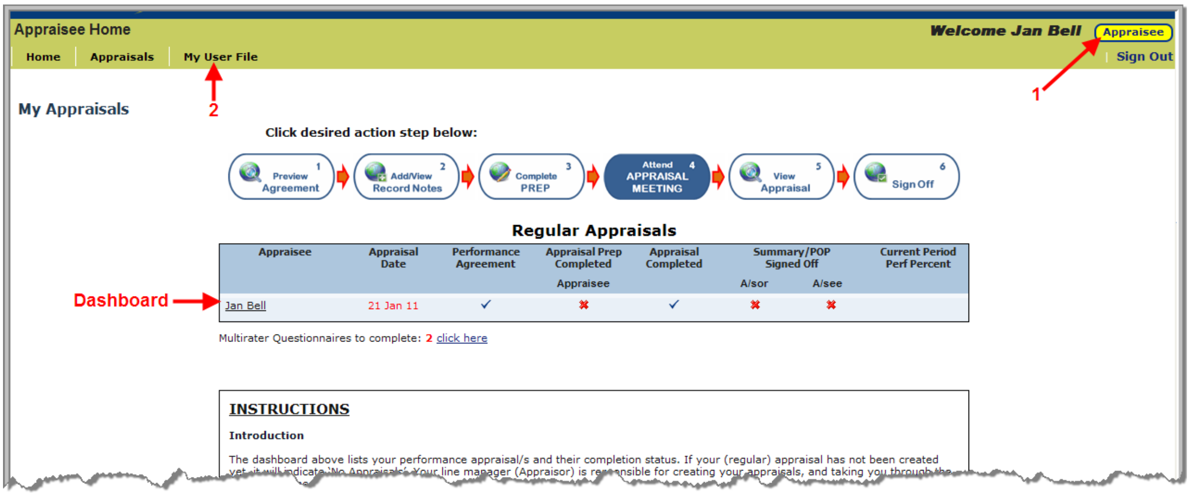
6000 Fairview Road, South Park Towers Charlotte NC 28210
www.talent-peak.com & User Support

Password Changes & User Files

Go to your role as Appraisee, by clicking on the role-link “Appraisee” top right of the screen (just above “Sign Out”). You will notice that the link “Appraisee” will now be highlighted yellow (see arrow 1 in the screenshot below).

(NOTE: If you do not have additional roles such as CorpAdmin, DivAdmin or Appraisor, then there will be only one role-link in your case, namely that of Appraisee, and you will go directly to that role when you log into the system (as per the screenshot below).

Your Appraisee home page looks as follows:

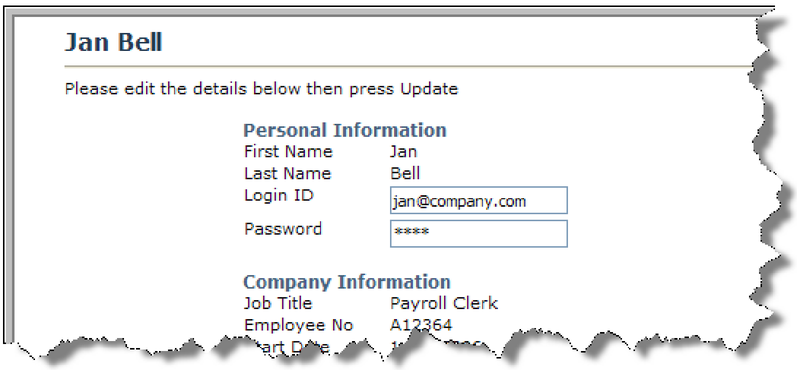


To change your User ID or Password, do the following: Go to your User File (see arrow 2 in screenshot above). Your User ID appears as text, and can be changed to anything you like (however, we strongly recommended that you use your work email address for best security - if you have your own computer).

Your Password is "hashed" (i.e. appearing as four stars for security purposes). Change your Password by overwriting the stars. When you click "Update", your new Password will be hashed again.

Never use only your first or last name as a Password. At least combine it with three or more numbers such as **Jan837.**
Change your Password at least once every six months.

User File Section:



Contact your manager or Corp-/DivAdmin if your User Details are incorrect or out of date.

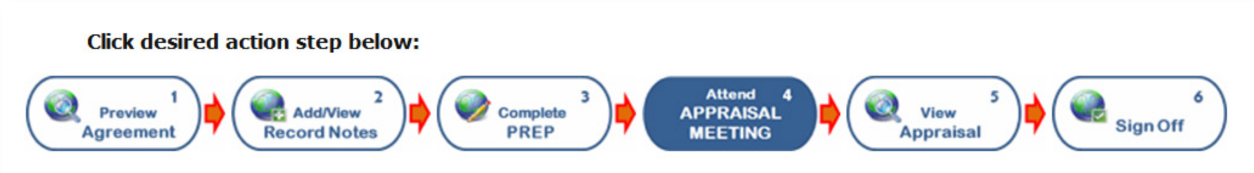
TalentPeak™ Performance Review Process Overview

TalentPeak™ has **four key** forms used in the review process that you may not be familiar with and they are:

1. The employee agreement or **Agreement** form
2. The Appraisal Preparation Form or **Prep** form for short
3. The **Official Appraisal Form**
4. The Summary Performance Optimization Plan or **Summary POP**

The Role Each Form Plays

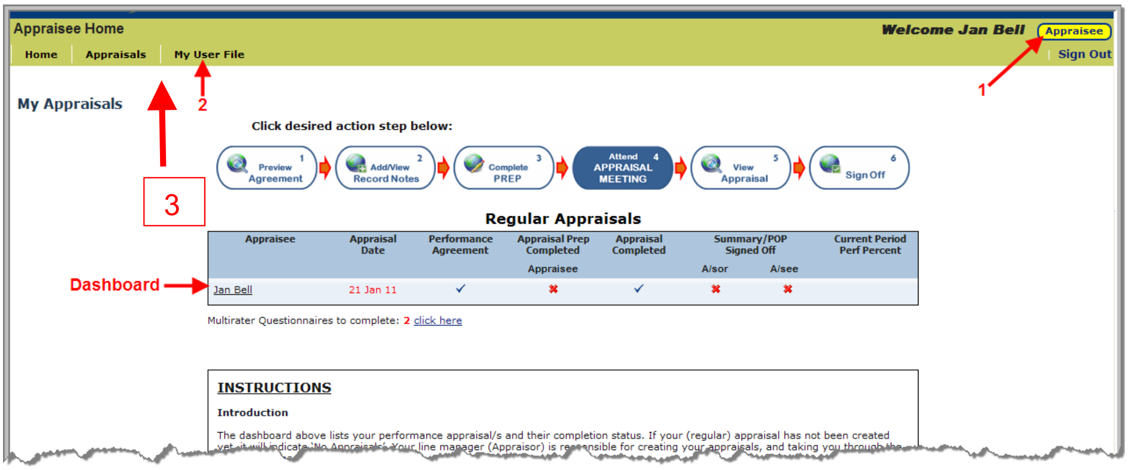
Action 1 The manager finalizes the employee's **Agreement** (Defined as "what is expected and how he or she will be evaluated")
Action 2 The manager and employee each complete a separate draft appraisal in preparation for their face to face review meeting – these are called **Prep Forms**
Action 3 Following the Face to Face review meeting the appraisor makes any necessary edits to their Prep Form and with a single click transfers the contents of the updated appraisor prep form to the appraisee's Official Appraisal Form
Action 4 The Appraisor then reviews and makes final edits to the **Official Appraisal Form** and with a single click transforms the entire contents of the **Official Appraisal Form** to the **Summary and Performance Optimization Plan and Sign Off Form**
Action 5 Employee views the Official Appraisal Form and the **Summary POP**, and then with a click signs off on their appraisal electronically



6000 Fairview Road, South Park Towers Charlotte NC 28210

Appraisal Manager Dashboard

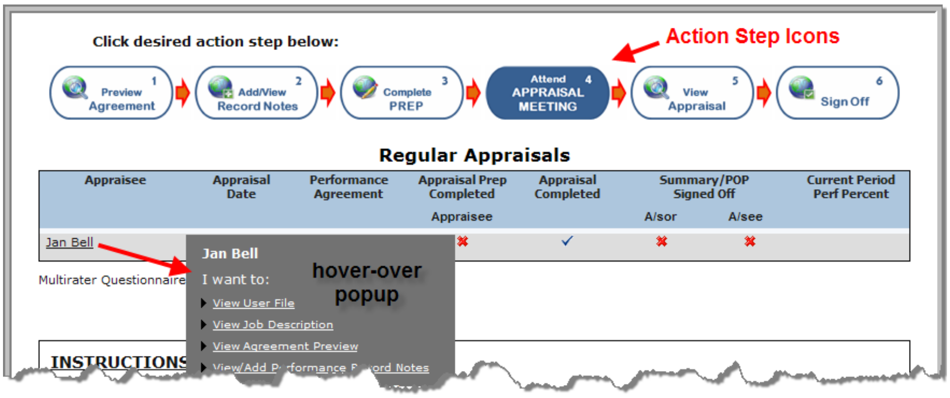
Next, from the dashboard link under **Appraisals >> click on Appraisal Manager** (see arrow # 3 below).



This will open your Appraisal Manager Dashboard If your direct line manager/supervisor (Appraisor) has already created an appraisal for you, you will see a page looking like the one below:

Your home page dashboard also indicates whether you have an appraisal created or not. This dashboard also provides details on the status/progress of your appraisal. From there you can also access all your appraisal forms (use the links in the hover popup, which shows when you put your cursor over your name, or the key action step icons).

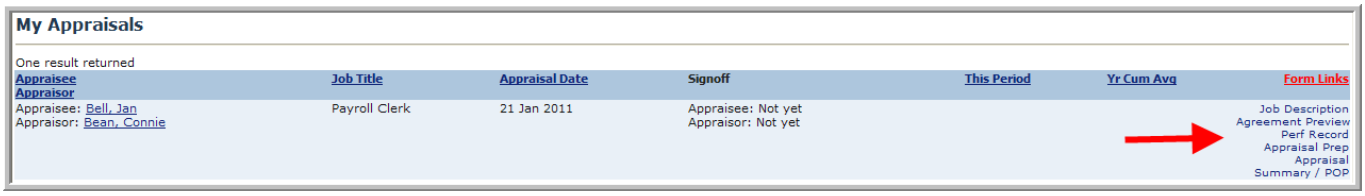
See screenshot below:



Appraisals should be created as early as possible at the beginning of a performance period so that you will know what is required of you with respect to your Performance Measures and Standards.

Appraisal Manager Page Overview

The **Appraisal Manager** page (or the popup in your home page dashboard) is the “portal” to gain access to your various online appraisal forms (see links on far right):



Form Links Description

- **Job Description** (if activated by your CorpAdmin): Shows your Job Description.
- **Agreement Preview:** To review your measures and standards to achieve.
- **Perf Record** (if activated by your CorpAdmin): To upload performance record notes (incidents) of your work performance throughout the performance period, and to view those uploaded by your manager. Read more about the Performance Record functionality click here.
- **Appraisal Prep:** Takes you to your Appraisal Preparation Form (also called “Self-Appraisal). This Appraisal PREP Form cannot be viewed by your Appraisor from his/her login, unless you release it to him/her. Read more about the PREP Form click here.
- **Appraisal:** Takes you to your Official Appraisal Form (completed by your Appraisor after the appraisal interview). You can only access this form once your Appraisor (and Higher Level Manager if activated) has signed off on your appraisal. Read more about the Official Appraisal Form click here.
- **Summary/POP:** Contains your Performance Percentage Calculations (or rating averages), Performance Optimisation Plan (POP), and signoff link. You can only access this form once your Appraisor (and Higher Level Manager if activated) has signed off on your appraisal. Read more about the Summary/POP Form click here.

Who is the Higher Level Manager (HLM)?
The system can be set up by your CorpAdmin to include the approval and signoff of your appraisal by your direct line manager’s manager, called Higher Level Manager (HLM) in the system. Alternatively, your Human Resources Department (Corp- or DivAdmin) can also act as HLM.

What are “This Period” & “Yr Cum Avg”?
If your organization has more frequent than annual appraisals (e.g. 1, 2, 3, 4, or 6-monthly), then the "This Period" column will show the appraisee performance percentages of the "just-completed" Performance Period only, while the "Yr Cum Avg" column will reflect the cumulative performance percentage averages of all the Performance Periods SO FAR since the start of the Performance Year.

For example: Let's say the system has been set for biannual (6-monthly) appraisals, and that a certain employee achieved a performance percentage of 94% for the first six months' appraisal (first Performance Period). At this point, both columns will show a figure of 94%. At the end of the Performance Year, ONLY the last six months (second Performance Period) is reviewed and NOT the full year. So let's say the employee has achieved a performance percentage of 86% for the second Performance Period. The "This Period" column will now show 86%, while the "Yr Cum Avg" column will show 90% (the average of the two Performance Periods). Why calculating the FULL YEAR performance percentage in this way? The answer is simply that the shorter the period under review, the more recent the performance data and incidences, and hence the "fresher" everything will be for the appraisor and appraisee, to ensure a more accurate and conflict-free appraisal. So, once a Performance Period had been appraised, you are done with it - you do not have to review it again later!

Performance Record Notes

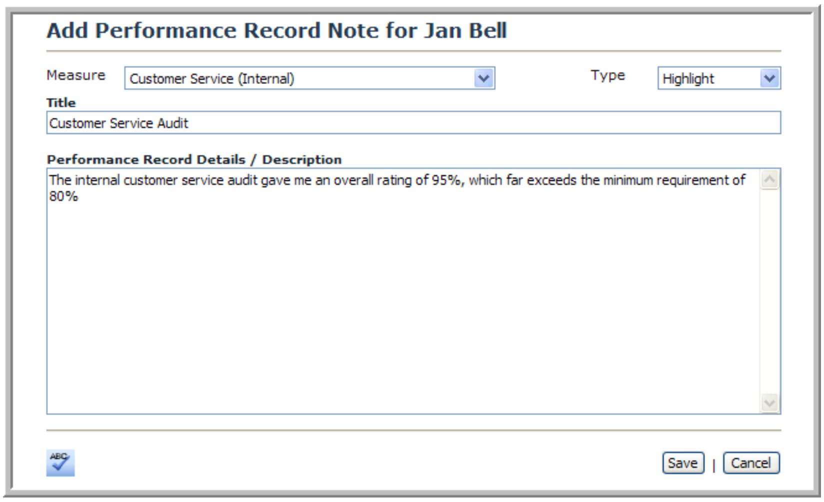
("Perf Record" Link)

Your CorpAdmin has the ability to disable the Performance Record Functionality of the system. A system warning will pop up (when clicking "Perf Record") if access had been disabled in this way.

If ENABLED, the Appraisor and Appraisee will have the ability to upload performance data, and examples of good ("highlight"), general, or poor ("lowlight") work performance or behaviour (incidents) into the system, to "call up" at appraisal time.

Such regularly uploaded performance notes will ensure that the FULL performance period is considered during appraisals, and not just the last few months.

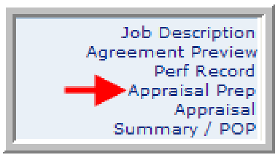
The two screenshots below show how a Performance Record Note gets added:



Two electronic files can be attached (uploaded) to each Performance Record Note as evidence of the incident recorded, e.g. an email from a client, or a spread sheet, with performance data.

When clicking SAVE, a system popup will ask you if you want to notify the Appraisor of the note you have added (done by system-generated email). NOTE: Your CorpAdmin can set the system to various combinations of Appraisee (non-) access to the Performance Record functionality.

Appraisal Preparation Form



("Appraisal Prep" Link)

Use this form for your self-appraisal when asked to do so by your Appraisor, i.e. add your provisional notes and give yourself provisional ratings for all your Performance Measures (consult the **Performance Records Notes** in the process – if this functionality is enabled – and print them out if you like). Appraisors have an exact duplicate Appraisal PREP Form on which they can enter their own provisional notes and ratings in private as well.

Your Appraisor should give you minimum one week's notice to prepare for your appraisal.

NOTE: Your Appraisal PREP Form cannot be viewed by your Appraisor, or anyone else, **unless you release your PREP Form** to your Appraisor at his/her request (check your organisation's policy in this regard). Corp- & DivAdmins can also view released Appraisee PREPs.

KEY

- **Radio Button 1 – Release PREP:** Select and click "Save Selection" to release your completed Prep Form to your Appraisor (when requested to do so).
- **Link 2 – Agreement Preview:** Pop-up page showing all your Performance Measures and Standards to achieve.
- **Link 3 – Performance Record Notes:** Pop-up page (filterable) with all Performance Record Notes (if enabled).
- **Link 4 – General Notes:** Small pop-up window showing notes added (if any) by your Appraisor (e.g. notes re specific projects or clients handled during a performance period).
- **Link 5 – Show Performance Record Notes:** Shows Performance Record Notes WITHIN the Prep Form under each Performance Measure.

NEXT STEP: Having prepared independently, both you and the Appraisor should then **print out your completed PREP Forms** (click "Click for Print View" top right of screen), and bring these with you to the appraisal interview, which should ideally be a face-to-face discussion.

After the appraisal your Appraisor will enter the results of the interview onto the Official Appraisal Form ("Appraisal" link), which you will also be able to access later after he/she has signed the appraisal off.

The recommended discussion sequence your Appraisor should follow during the appraisal (for each Performance Measure):

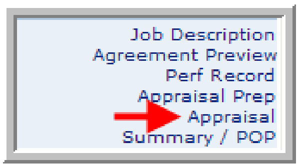
Discuss and reach consensus with you as to what has actually happened with respect to the specific measure over the performance period (consider all performance standards per measure). He/she should ask for your input, add his/her own, and consult the Performance Record Notes on that measure (if any), and then enter a summary of all this into the Actual Performance Notes field of the measure on the Official Appraisal Form.

Mutually agree on a Rating that most accurately reflects the level of performance as agreed in step one, and tick this rating in the Rating Key (all performance standards per measure must be considered jointly).

Discuss and agree what needs to be done (if anything) to help you improve your performance regarding the Performance Measure over the next performance period, including any training and coaching. These are noted in the POP Field. See bottom of PREP Form for more details on the Performance Optimisation Plan (POP).

NOTE: Best practice suggests that your Appraisor has the final say should there be disagreement on any issue. However, your organisation should have a policy in place with respect to handling serious differences in opinion between Appraisors and Appraisees (which they cannot resolve themselves), such as the involvement of your manager's manager to consider the facts and make a final decision. Other organisations, again, get their HR Department to "arbitrate". Find out what applies in your organisation.

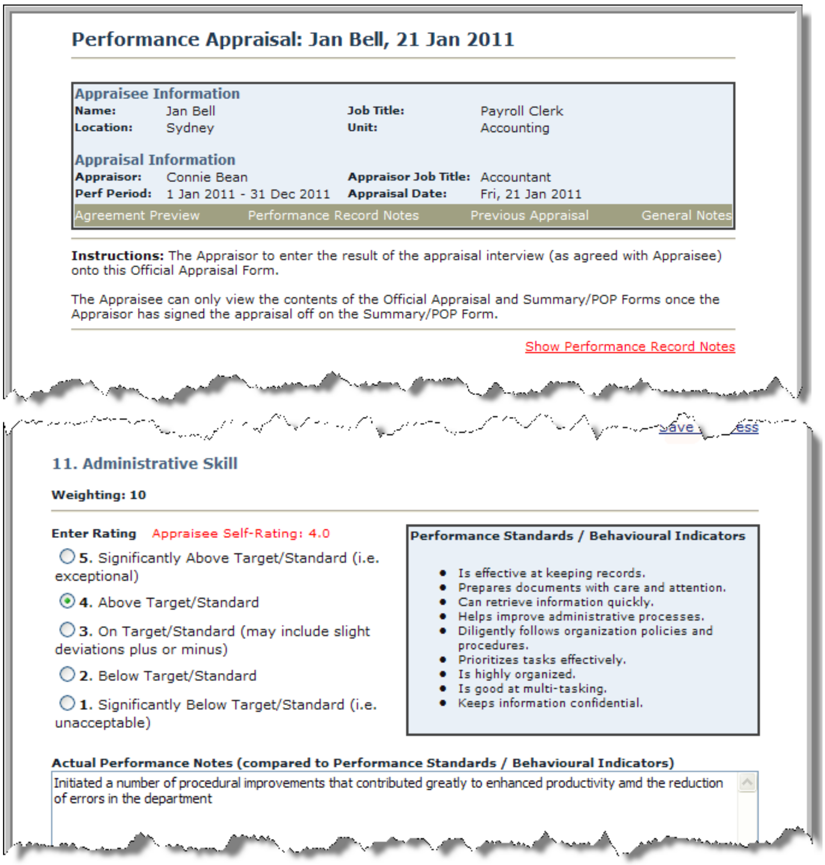
Official Appraisal Form



(“Appraisal” Link)

After the appraisal interview, once your Appraisor has entered the results of the appraisal onto the Official Appraisal Form and signed it off, you will be able to access it as well to review the notes and ratings.

Check its accuracy, and if you find anything not reflecting what had been discussed and agreed during the appraisal interview itself, contact your Appraisor to make the necessary corrections.

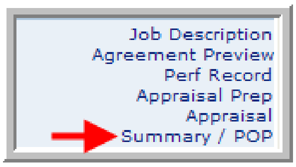


What is a Weighting?
A Performance Agreement consists of a number of Performance Measures (typically around 5 to 15) relevant to a specific position/jobholder. However, these measures could not all be equally important - so they need to be "weighted" to indicate their relative importance to each other, i.e. the higher the importance of a measure, the higher its weighting should be.

In TalentPeak™ , the weightings off all Performance Measures need to add up to a total figure of 100. These weightings are factored into the equation that calculates an employee's overall performance percentage, leading to a substantially fairer and more realistic end result. Weightings also indicate to employees where they should focus their efforts more. Performing poorly on a high-weighted measure will have a big negative impact on their overall performance percentage, and vice versa.

NOTE: When the system is set to NOT show performance percentages, it is not necessary to allocate weightings to measures.

Appraisal Summary and Performance Optimisation Plan (POP)



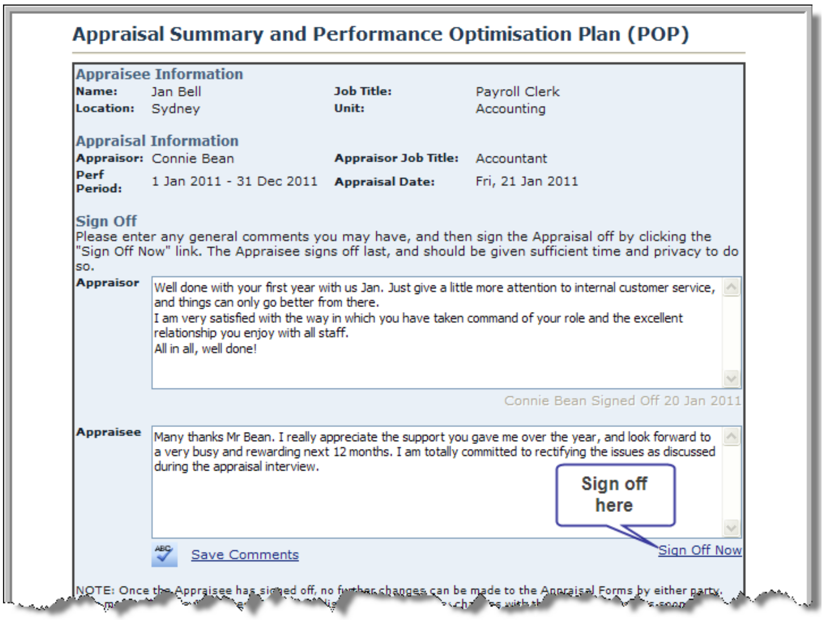
("Summary/POP" link)

Your performance percentage calculations (or RATING AVERAGE if the weightings and percentage feature of the system had been disabled by your CorpAdmin), show on this page, as well as all the Performance Optimisation Plan (POP) notes carried over from the Official Appraisal Form.

You will also notice any general comments your Appraisor has made in the Appraisor signoff section of the form.

Signing Off

Finally, you can enter some general comments yourself (in the field next to "Appraisee"), and sign the appraisal off by clicking: Sign Off Now



Performance Measures	Rating	Weighting	Weighted Rating	PERFORMANCE OPTIMISATION PLAN (incl. Training & Coaching)
1. Processing of Weekly, Bi-Monthly and Monthly salary/wage runs	2	20	40	Investigate and submit a new operating procedure to cut the weekly wages run time by minimum 20% by 31 December 2011.
2. Liaising with Accounts Department	3	10	30	
3. Inland Revenue returns and payments	2	10	20	
4. General Ledger	4	7	28	Ask Sue to double-check to prevent any errors.
5. Budgeting	4	10	40	
6. Reporting	3	5	15	Also include pie charts with monthly reports to show salary/wages breakdown.
7. New employee processing	3	8	24	
8. Processing terminations	3	5	15	Sue to coach and assist with next three staff terminations.
9. Self Development	3	5	15	80% of planned L&D activities to be completed by 31 October 2011.
10. Accuracy	3	5	15	Manager to provide latest MS Office Suite. Attend MS Excel Advanced workshop externally at Horizons PC Training.
11. Administrative Skill	4	10	40	
12. Customer Service (Internal)	2	5	10	To attend advanced external Customer Service Workshop.
		100	292	
Overall Performance			97%	(Weighted Rating Avg: **2.9**)

NOTE: When the Weightings and Performance Percentages are disabled in the system, then RATING AVERAGES as opposed to percentages will show

Undoing signoffs

After your signoff, all your appraisal forms are “locked”, and your Appraisor will not be able to make any changes to it, unless he/she asks the Corp- or DivAdmin to UNDO the signoffs of everybody first. This should only be done with your full knowledge and consent to e.g. rectify an error on one of the forms. Once the correction has been made, the Appraisor will need to sign off again (and HLM if activated), followed by your own signoff LAST to “lock” all the forms again.

As long as your signoff remains intact, you can rest assured that your Appraisor (or Corp- & Divadmin) could not have made any changes to any of your appraisal forms.

Final Remarks

Through the appropriate use of the TalentPeak™ System, you will be able to:

- Know upfront at the start of a performance period what is expected of you with respect to your job-relevant Performance Measures and Standards (from the moment your manager creates you appraisal in the system). **(Click on Preview Agreement)**
- Log into the system at any time to continuously remind yourself of these measures and standards.
- See what Performance Record Notes (if Performance Record functionality enabled) your manager has entered into the system, plus be able to add your own performance examples (or work barriers experienced).
- Prepare for your appraisal in private on your Appraisal PREP Form (Self-Appraisal).
- Review what your Appraisor has entered into your Official Appraisal Form (after the appraisal), and ask for corrections if necessary.
- See your performance percentage calculations (or rating average) on your Appraisal Summary/POP Form.
- See your Appraisor’s final comments, enter your own, and sign off electronically (thereby “locking” all your appraisal forms).
- Act upon the POP Notes to improve your competence, and ensure (along with your manager) that environmental work barriers such as a lack of resources, poor systems, policies and procedures are addressed to facilitate work performance and not hinder it.

Performance Management and Appraisals do not come easier and more participative and transparent than what TalentPeak™ allows you – so use it to its full power to obtain maximum benefit.

6000 Fairview Road, South Park Towers Charlotte NC 28210
www.talent-peak.com & User Support

TalentPeak™ Definitions

What are Performance Measures & Standards?

They are a quantitative or qualitative process or output "factor" on which performance is assessed. The most common types of Performance Measure are Goals, Objectives, KPIs, Competencies and Values. There should be approximately 5 to 15 Performance Measures (any combination) per position/role.

Objective - Short-term in focus (up to 2 years), Objectives are formulated as with Goals, e.g.: "Implement a new Accounting System by 'x' date". Additional Performance Standards are normally added to guide and measure jobholder performance. Objectives should be **SMART: S**pecific, **M**easurable, **A**ction-oriented, **R**esults-focused, **T**ime-bound

Goal - Medium to long-term in focus (2 years plus), goals are formulated (starting with an action verb) as specific results/outcomes to attain by a certain date, e.g.: "Achieve 40% market share by Dec 31, 2012".

KPI - Key Performance Indicators are OUTPUT MEASURES such as: Sales, Customer Satisfaction, Avg $ Value per Transaction, Staff Retention, ROI, Market Share, etc.

Competency
Job-critical skills, knowledge, abilities, characteristics, attributes and attitudes that combine to produce outstanding performance in a specific position.

Examples of Competencies are: Interpersonal Skills, Leadership, Teamwork, Accuracy, Creativity, Customer Focus, Integrity, Selling Skills, etc. Whereas Goals, Objectives and KPIs have Performance Standards, Competencies and Values have Behavioral Indicators (these are prime behavior examples describing the Competency), e.g.:

Performance Standards - Written statements, describing HOW WELL Performance Measures should be performed; i.e. the benchmarks against which to evaluate work performance. Performance Standards should be clearly definable, unambiguous, and simple.

There are, broadly spoken, two types of performance standards: QUANTITATIVE and QUALITATIVE.

1. QUANTITATIVE STANDARDS (quantifiable and objectively measurable):

- Numbers, quantity of products/services to deliver ("300 items", "10 service calls per day")
- Duration, deadlines, target dates ("one month", "by 15 November")
- Frequency ("monthly")
- Costs, expenses, budgets ("$5,000")
- Income, savings, profit, turnover, sales targets ("$10m")
- Percentages ("increase by 35%", "25% ROI", "40% market share")
- Ratios ("output:input", "staff complement:customers", "debt:equity", "sales:cost of sales")
- Technical tolerances ("2 microns")
- Error/reject rate, wastage, downtime ("not to exceed 3%")

2. QUALITATIVE STANDARDS (descriptive):

- Certain critical steps to include with goal/objective execution ("Present recommendations to Management Team for final approval")
- The following of an official process, policy or legislation ("Legislation XYZ", "Checklist B")
- Required behaviors to exhibit during objective achievement ("Smile and great customers entering the store", "Answer incoming calls within three rings", "Treat all customers with courtesy and respect").

6000 Fairview Road, South Park Towers Charlotte NC 28210
www.talent-peak.com & User Support

TalentPeak™ Definitions of Form Links

Job Description (if this feature is activated & has been released by CorpAdmin): Clicking this link shows the viewable version of the Appraisee's Job Description

Agreement: Opens the **Performance Agreement** to view or edit

Perf Record: Opens the page where Appraisor or Appraisee can View or Add **Performance Record Notes** to document good or poor work performance or behaviour throughout the performance period.

Appraisor Prep: Takes you to the **Appraisor Preparation (Draft) Form**. The Appraisor's PREP form cannot be viewed by the Appraisee, or anyone else; unless the feature to "allow its release" is activated in System Settings. (Appraisees have their own PREP Form, also called "Self-Appraisal").

Appraisal: Takes you to the **Official Appraisal Form** of the Appraisee (to be completed after the appraisal interview). The contents of the Appraisor Prep Form can be transferred into this form (individual measures, or the entire PREP Form contents in one step - see transfer links on the Appraisor Prep Form).

NOTE: The Official Appraisal Form cannot be viewed by the Appraisee from his/her login until such time as the Appraisor - and Higher Level Manager (HLM) if activated - signs off on the Appraisal (the HLM can e.g. be the Appraisor's boss or the Corp- or DivAdmin)

Summary/POP: Contains the Performance Percentage Calculations (or rating averages), **Performance Optimisation Plans**, and signoff links.

NOTE: The Summary/POP Form also cannot be viewed by the Appraisee from his/her login until such time as the Appraisor (and HLM if activated) signs off on the Appraisal.

Delete: Deletes an appraisal that has not been signed off yet

Optional Add On Modules and Systems Overview

1. Multirater System

If activated by your CorpAdmin, the Multirater will allow up to five other managers/co-workers to rate and give feedback on an employee's performance (e.g. an employee reporting to more than one manager, or project managers in a matrix organisation). Please see the Multirater Appraisee Guide Section for more information.

2. Learning Management (L&D) System

If activated as an add-on system to manage all employees' Learning and Development, Personal Development Plans (PDPs) and Career Development. Please see the L & D Appraisee Guide in this Section for more information.

3. Goal Management Module

If activated as an add-on system to create, cascade and manage Goals for the organization. Please see the Summit Goal™ Management Appraisee Guide in this Section.

4. Compass360 Feedback System

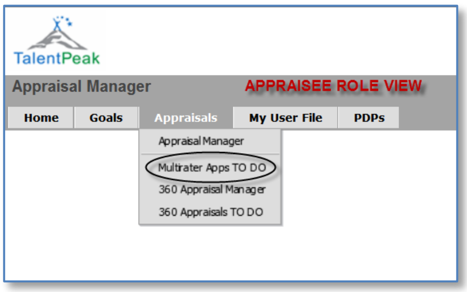
If activated as an add-on system to the core performance management, or as a stand-alone system; it may or may not be viewable to some or all employees. Please see the Compass 360™ Appraisee guide in this Section.

6000 Fairview Road, South Park Towers Charlotte NC 28210
www.talent-peak.com & User Support

TalentPeak™ Multirater Module Appraisee Guide

Access to the Multirater module is only if activated by your organization, and will you see the following.

Multirater Completion of the Appraisal Questionnaire



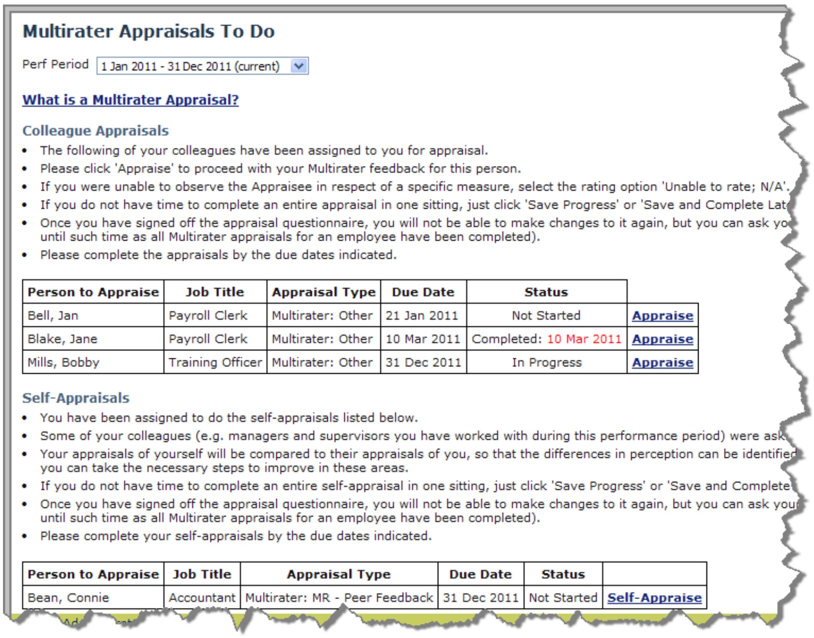
Multiraters go to their **Appraisee Role**, and select **Appraisals >> Multirater Apps TO DO**

NOTE: You will also receive an email notification which will have detailed instructions plus a hyperlink that opens the questionnaire directly without havening to log into the system.

Multirater Appraisals To Do

There are two types (follow the detailed instructions):

- Colleague Appraisals
- Self-Appraisals



Multirater Appraisals To Do

Perf Period 1 Jan 2011 - 31 Dec 2011 (current)

What is a Multirater Appraisal?

Colleague Appraisals

- The following of your colleagues have been assigned to you for appraisal.
- Please click 'Appraise' to proceed with your Multirater feedback for this person.
- If you were unable to observe the Appraisee in respect of a specific measure, select the rating option 'Unable to rate; N/A'.
- If you do not have time to complete an entire appraisal in one sitting, just click 'Save Progress' or 'Save and Complete Lat
- Once you have signed off the appraisal questionnaire, you will not be able to make changes to it again, but you can ask yo until such time as all Multirater appraisals for an employee have been completed).
- Please complete the appraisals by the due dates indicated.

Person to Appraise	Job Title	Appraisal Type	Due Date	Status	
Bell, Jan	Payroll Clerk	Multirater: Other	21 Jan 2011	Not Started	Appraise
Blake, Jane	Payroll Clerk	Multirater: Other	10 Mar 2011	Completed: 10 Mar 2011	Appraise
Mills, Bobby	Training Officer	Multirater: Other	31 Dec 2011	In Progress	Appraise

Self-Appraisals

- You have been assigned to do the self-appraisals listed below.
- Some of your colleagues (e.g. managers and supervisors you have worked with during this performance period) were ask
- Your appraisals of yourself will be compared to their appraisals of you, so that the differences in perception can be identified you can take the necessary steps to improve in these areas.
- If you do not have time to complete an entire self-appraisal in one sitting, just click 'Save Progress' or 'Save and Complete
- Once you have signed off the appraisal questionnaire, you will not be able to make changes to it again, but you can ask you until such time as all Multirater appraisals for an employee have been completed).
- Please complete your self-appraisals by the due dates indicated.

Person to Appraise	Job Title	Appraisal Type	Due Date	Status	
Bean, Connie	Accountant	Multirater: MR - Peer Feedback	31 Dec 2011	Not Started	Self-Appraise

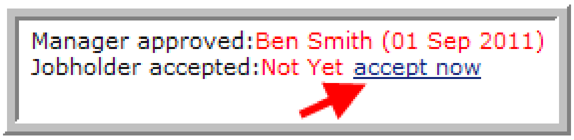
TIP: If you do not see any names under Colleague Appraisals, "Person to Appraise" or Self-Appraisals; you do not have any to complete at this time.

TalentPeak Summit Goal Management™ System Appraisee Guide

Summit Goal Management™ is an add-on to the TalentPeak core performance appraisal system. This section of the Comprehensive Reference Guide for Appraisors is intended for those managers who have this system activated.

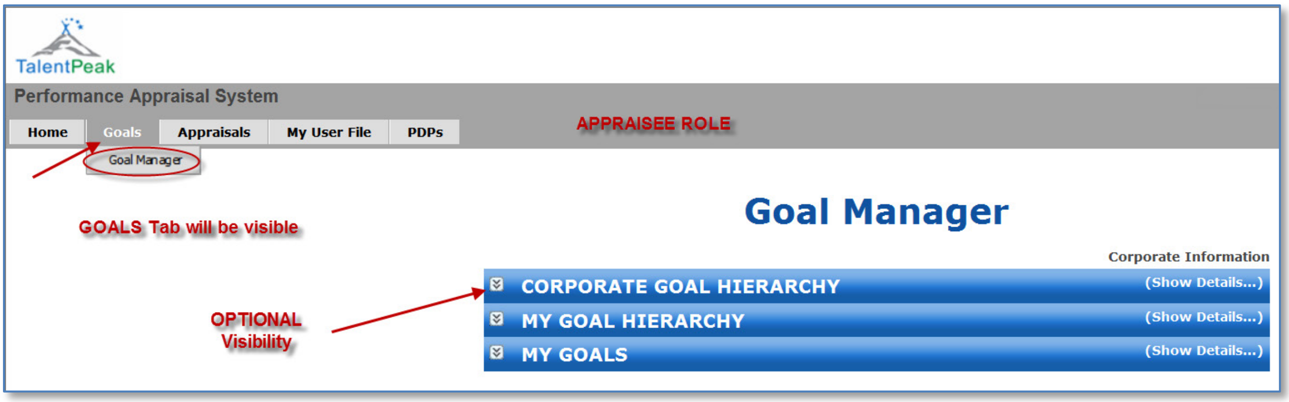
Definitions & Process Steps:

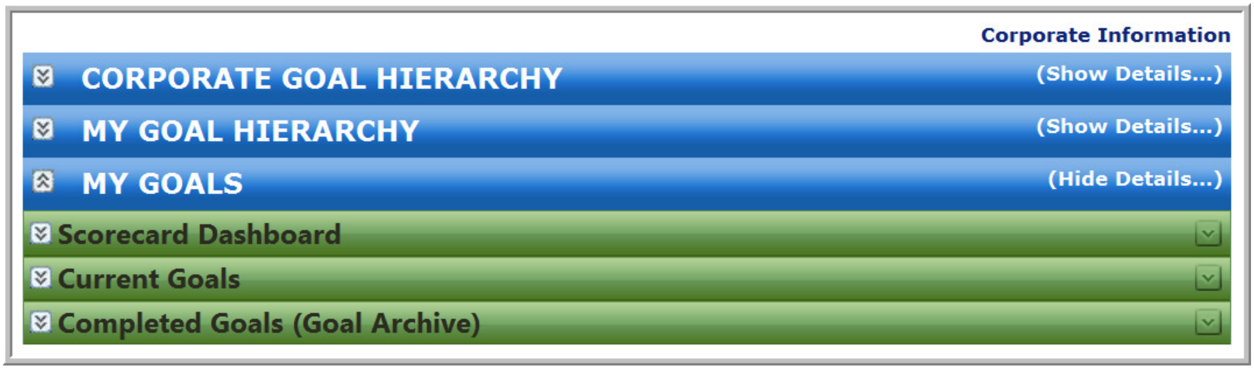
- **Due Date:** Agreed between Manager/Appraisor & Appraisee (Jobholder)
- **Priority:** Appraisor (manager) assigns the relevant option.
- **Status & Percent Completed: Set by jobholder as he/she progresses with goal achievement – needs to be updated at agreed times, e.g. weekly on Mondays before 10am, so the manager can check on their progress for all direct reports.**
- **Date Completed:** Selected by manager once satisfied that goal had been achieved.
- **Approve:** Manager approves the goal, by clicking the 'approve now' link. This locks the Goal Title, Description, Due Date, and Priority. *This approval can be undone* at any time by the manager, if changes to the above items need to be made. This will also undo the jobholder goal acceptance (signoff), which needs to be done again after the change and manager new approval.
- **Accept: The jobholder needs to accept (sign off on) the goal from his/her login.**



Employee Role – Access and Visibility

The employee has access to the following goal hierarchies and pages:





Corporate Goal Hierarchy

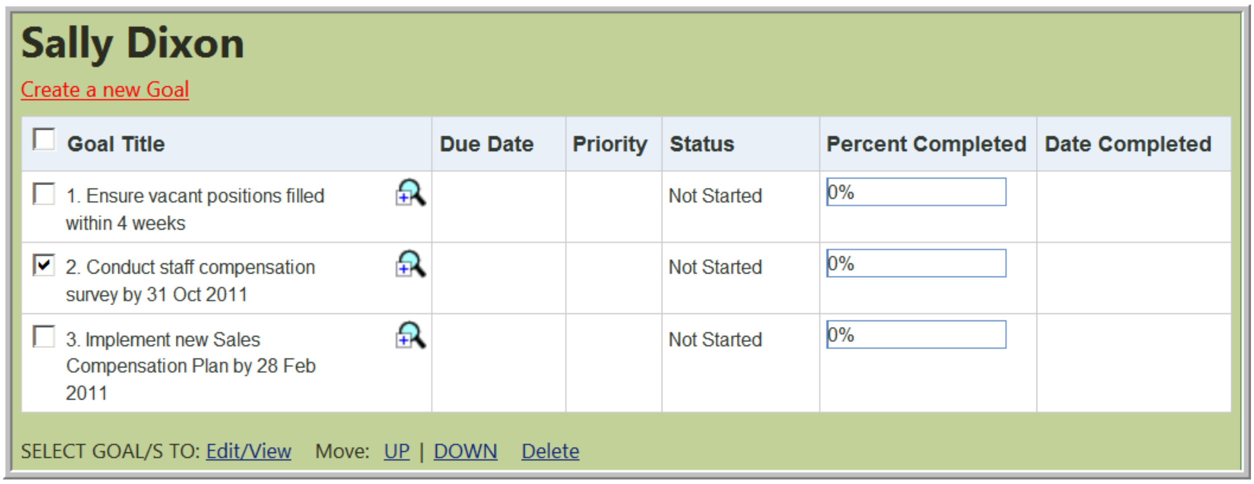
Visible only if allowed by the CorpAdmin (HR). Goals can be cascaded as well, but only to him/herself.

My Goal Hierarchy

Place where the employee can plan his/her own goals. Goals can be cascaded as well, but only to him/herself.

My Goals

In the example below, editing rights were given to the employee by her manager. If not, then the goals can only be viewed, but not edited.



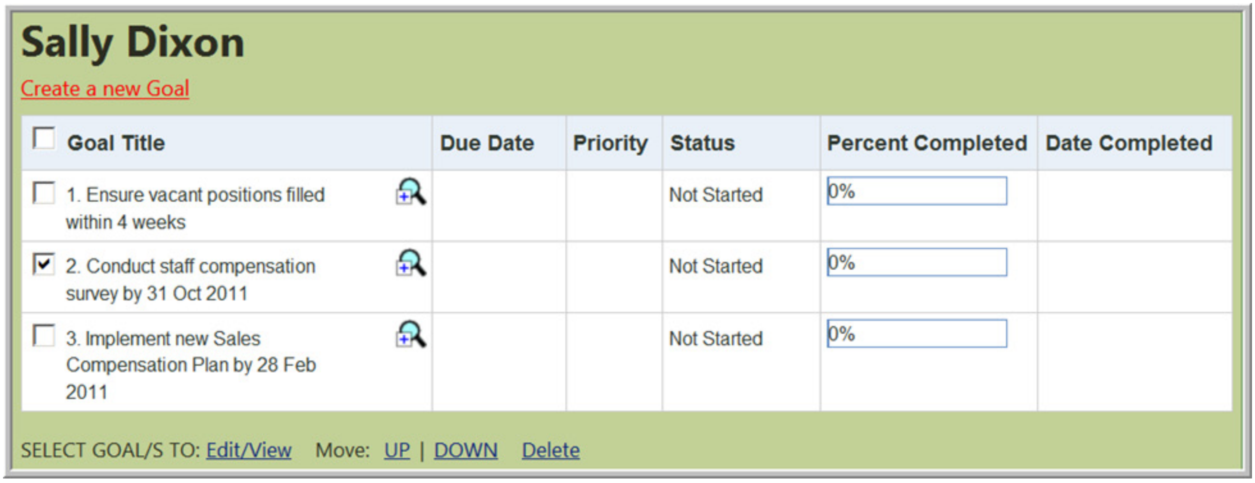
Sally Dixon

Create a new Goal

Goal Title	Due Date	Priority	Status	Percent Completed	Date Completed
1. Ensure vacant positions filled within 4 weeks			Not Started	0%	
2. Conduct staff compensation survey by 31 Oct 2011			Not Started	0%	
3. Implement new Sales Compensation Plan by 28 Feb 2011			Not Started	0%	

SELECT GOAL/S TO: Edit/View Move: UP | DOWN Delete

Editing & Viewing My Goals



Sally Dixon

Create a new Goal

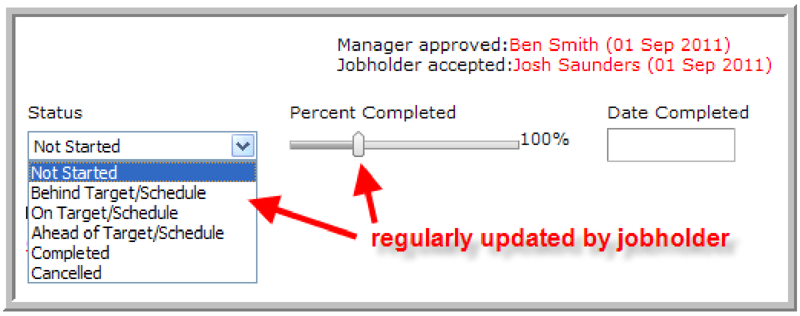
Goal Title	Due Date	Priority	Status	Percent Completed	Date Completed
☐ 1. Ensure vacant positions filled within 4 weeks			Not Started	0%	
☑ 2. Conduct staff compensation survey by 31 Oct 2011			Not Started	0%	
☐ 3. Implement new Sales Compensation Plan by 28 Feb 2011			Not Started	0%	

SELECT GOAL/S TO: Edit/View Move: UP | DOWN Delete

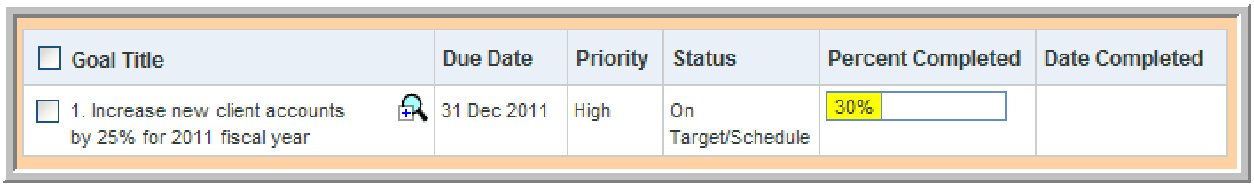
Select a goal to:

- Edit/View
- Move up or down in the list of goals
- Delete

The Goal Status and Percent Completed need to be updated regularly by the jobholder on a weekly/monthly/quarterly basis as per manager's time line assigned to you



When updated this way, it will display as follows:



Goal Title	Due Date	Priority	Status	Percent Completed	Date Completed
☐ 1. Increase new client accounts by 25% for 2011 fiscal year	31 Dec 2011	High	On Target/Schedule	30%	

Adding Goal Steps (optional)

Click 'Add (new) Action Step for this Goal' if you want to set some key steps to be taken in the execution of the goal (Manager/Appraisor and/or Appraisee/Jobholder can do this).

Clicking this link opens the following pop-up page, where you can enter the step details as illustrated:

Enter the step details as illustrated:

Having entered the steps, they will display as follows on the goal page:

TalentPeak
L & D
Learning and Development System

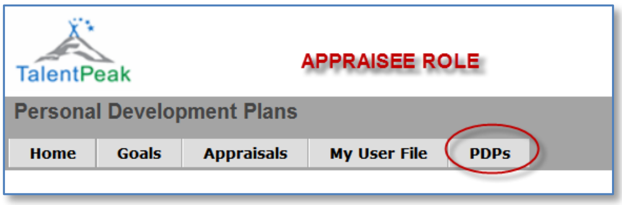
TalentPeak™ Learning & Development System Appraisee Guide

The **Learning Management System** allows your organisation to populate a central **Learning and Development (L&D) Library** with all the internal and external (formal) courses and workshops that it offers its employees. Employees, for their part, have their own **Personal Development Plans (PDPs),** which can be populated with needs-specific courses/workshops (L&D items) downloaded from the library.

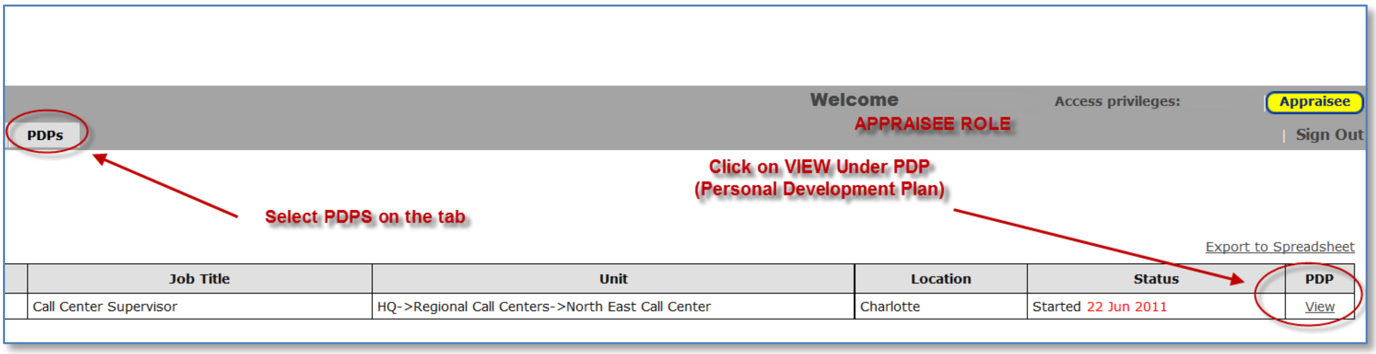
These then, are monitored for completion by employees -- and once done -- are transferred into the HISTORY section of the PDP, so that a complete record is kept of past and future training and development. On-the-job training and coaching are also recorded on PDPs.

Accessing your Personal Development Plan (PDP)

Log into the TalentPeak™ System, and make sure you are in your **Appraisee** role (if you have more than one role-link top right of the screen).



In the menu bar, click the **PDPs** link, and in the table on the page that opens, click **"View"** in the **PDP Column** to open your PDP.



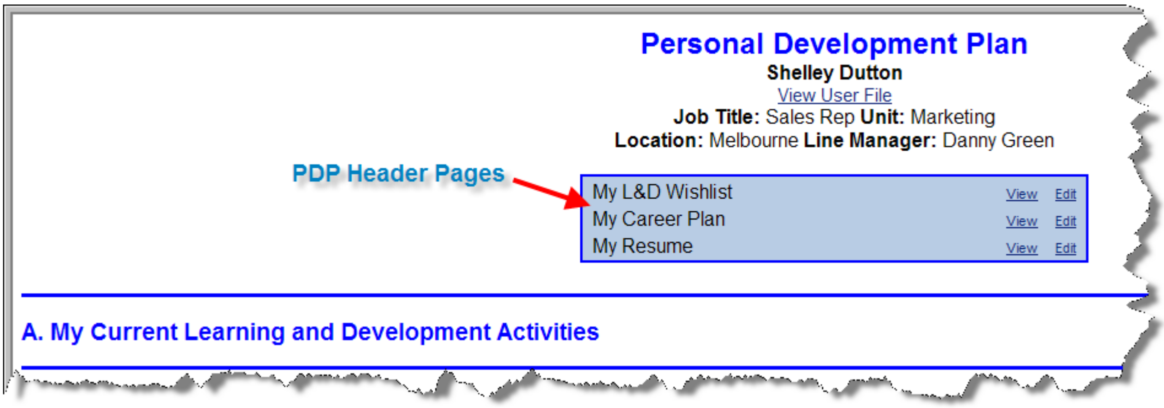
Who may populate your PDP?

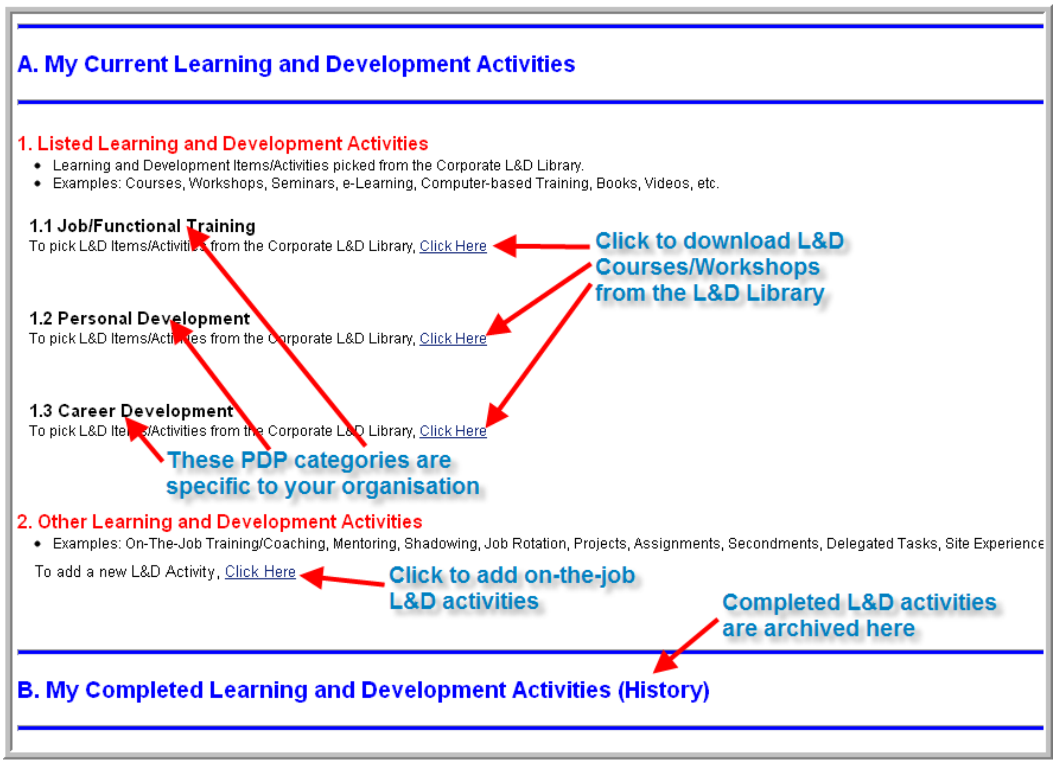
This will depend on your organisation policy, so please consult your manager (or HR) about your role in this regard. Some organisations may have only permitted your direct line manager (and/or HR) to populate your PDP; or after collaboration with your manger, you may also have the ability to participate in adding development activities.

The rest of this User Guide will cover how you can populate your own PDP, should you be allowed to do so.

The Personal Development Plan (PDP)

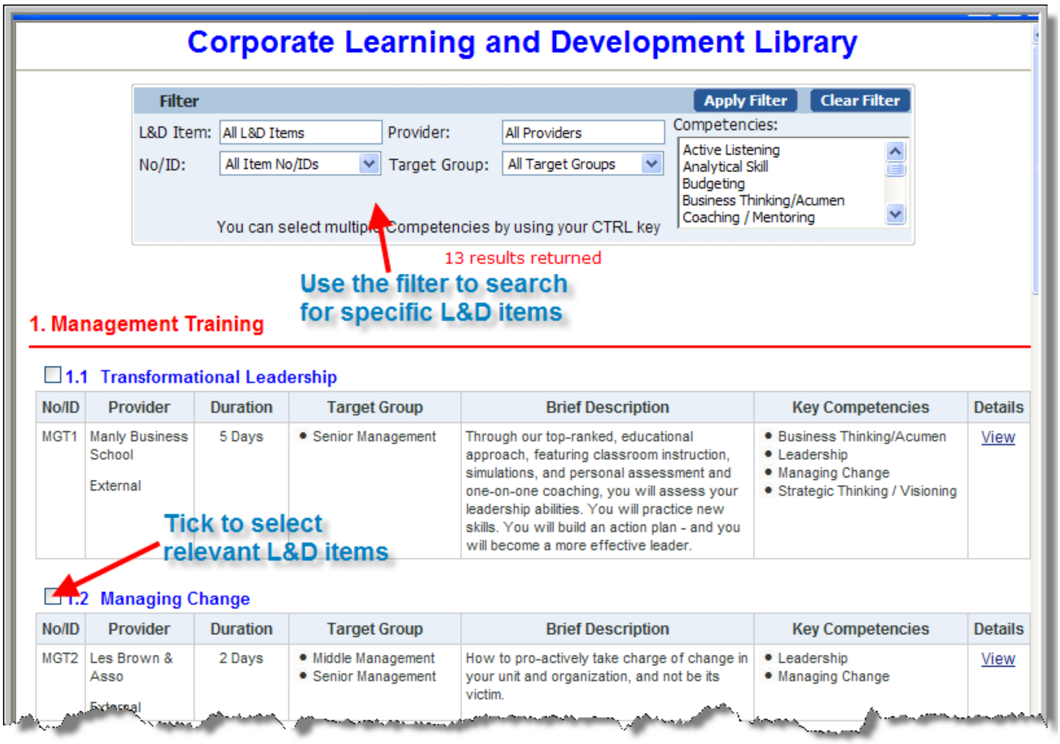
Once a learning need (competency gap) has been established (e.g. through a performance appraisal), your PDP should be opened and suitable L&D items/activities selected from the L&D Library, for downloading into your PDP.



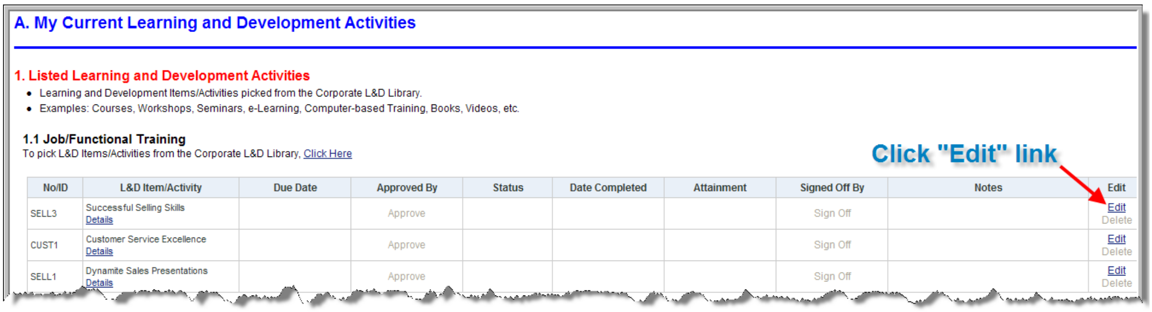


To download L&D items (courses or workshops) from the L&D Library, select the "**Click Here**" link underneath the appropriate L&D Category.

This will open the L&D Library where the required L&D items can be selected for downloading to the PDP.



Downloaded L&D items can now be edited as required. Note that only your manager (or HR) can approve the L&D items, and sign them off as completed, so ask them to approve the L&D items you have selected (if agreeing with your choices of course).



Some L&D activities will not be formal or classroom-based (i.e. not listed in the L&D Library), but better addressed on the job, such as: On-The-Job Training/Coaching, Mentoring, Shadowing, Job Rotation, Projects, Assignments, Secondments, Delegated Tasks, Site Experience, Work Manuals, etc.

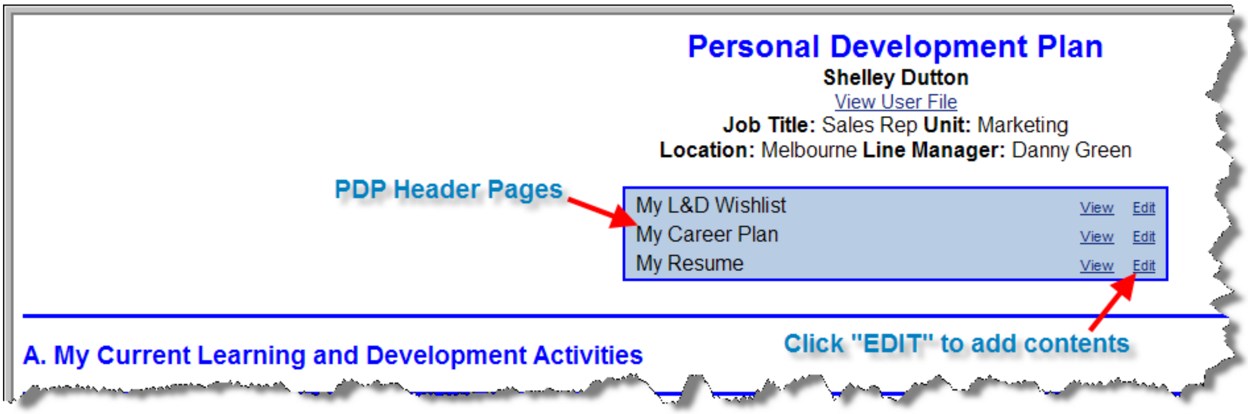
These are added in the **Other Learning and Development Activities** section.

L&D items signed off by your manager/HR as successfully completed will move into the HISTORY section of the PDP.

No/ID	L&D Item/Activity	Due Date	Approved By	Status	Date Completed	Attainment	Signed Off By	Notes	Edit
OHS3	OHS Risk Management Details	14 Jan 2009	Joe Jones 26 Jan 2009	Completed	28 Jan 2009	Distinction	Joe Jones 03 Feb 2009	Best student in class	Edit

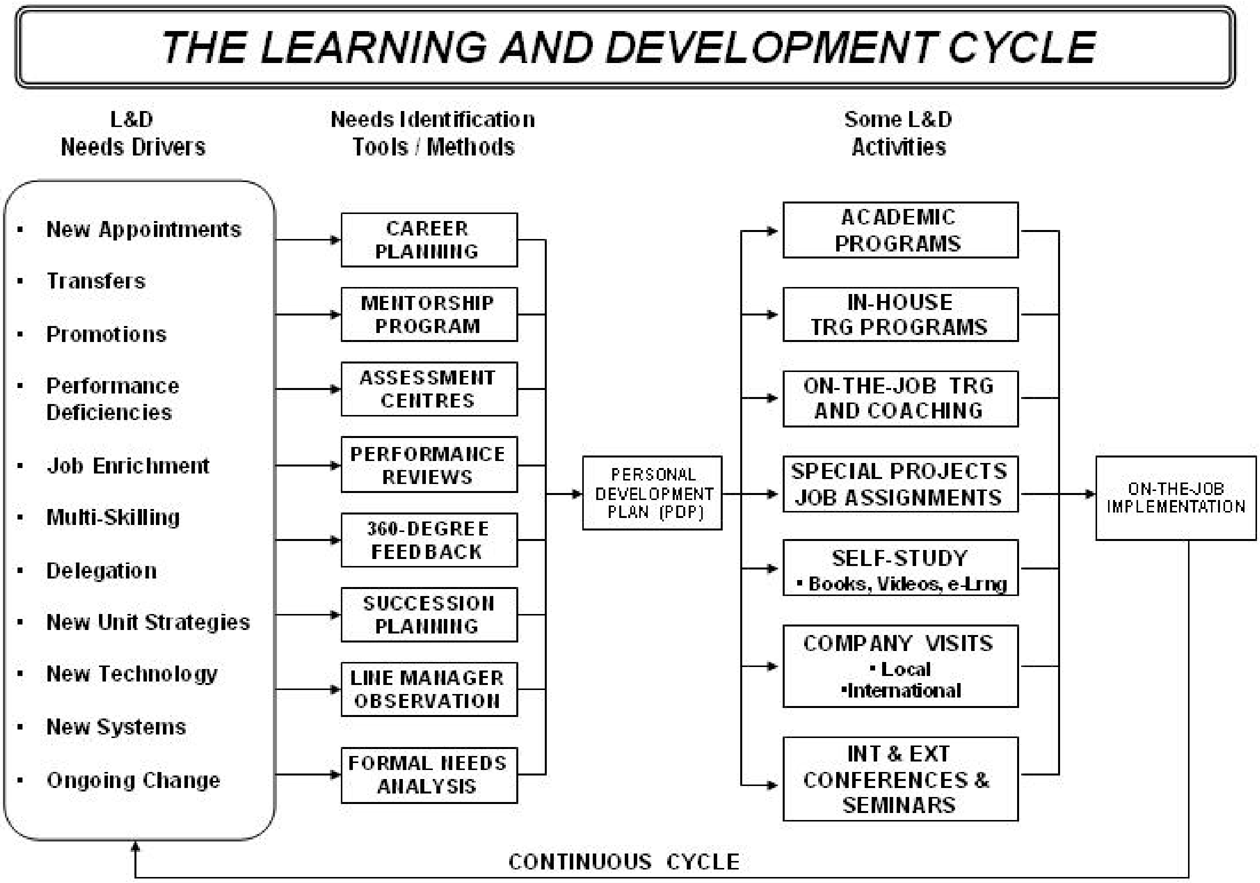
PDP Header Pages

Your system administrator can create any type and number of PDP Header Pages, where you can add your own ideas on the listed topics. Only you can edit these pages, so it will be read-only for your manager and HR/System Administrator.



6000 Fairview Road, South Park Towers Charlotte NC 28210
www.talent-peak.com & User Support

The Learning and Development Cycle Graphical View



TalentPeak Compass 360™ System Appraisee Guide

The Compass 360™ is an add-on to the TalentPeak core performance appraisal system. This section of the Appraisee Comprehensive Reference Guide is intended for those employees who have this system activated.

Compass 360™ Comparison to Other 360 Systems

Most 360-degree feedback systems use the same set of around 25 to 100 questions for ALL Rater Groups (e.g. Manager/s, Peers, Direct Reports, Customers). The problem with that is that from each Rater Group's unique perspective (context), a certain portion/percentage of these questions will not be relevant, e.g. how well can a PEER answer questions about customer service (especially external customer service), or a CUSTOMER about teamwork?

Most systems try to overcome this problem by using very generic questions - to fit all Rater Groups - but with potentially equally generic and bland results.

The **context-targeted technology** of Compass360 enables highly targeted question sets for each individual Rater Group - covering its unique working relationship and involvement with the employee, e.g.:

- PEERS: Questions about teamwork (and related).
- CUSTOMERS: Questions about customer service (and related).
- MANAGER/S: Questions about the employee's job competence and behaviours.
- DIRECT REPORTS: Questions about the manager's management style and practices.

Compass360 allows 20+ raters (no upper limit) per 360 Appraisal. Below are examples of how these can be distributed in practice:

Educational Institutions:

- Student feedback: 5 to 50 raters (questions about classroom presentation, student relations, etc.)
- Peer feedback: 3 to 10 raters
- Principal/Dean & Department Head/s feedback: 1 to 10 raters

Other Organisations:

- Peer feedback: 3 to 10 raters
- Direct Report feedback: 3 to 10 raters
- Line Manager feedback: 1 to 5 raters
- Customer (internal or external) feedback: 3 to 20 raters

(The above are examples only, as any number of raters per Rater Group and 360 can be assigned)

The number and types of Rater Groups will depend on who you want feedback from, and can therefore be different combinations for your employees (360 feedback recipients) - leading to additional flexibility in the use of the system).

As mentioned above, question sets for each Rater Group are highly context-targeted towards that Rater Group, based on their unique working relationship and involvement with the employee.

This leads to dramatically more useful and actionable feedback for the Appraisee, with resultant hugely enhanced behaviour and performance improvement.

Please note: Compass360 is unique in respect of its context-targeted technology, but it also provides the standard 360 option of one set of questions/competencies for all Rater Groups.

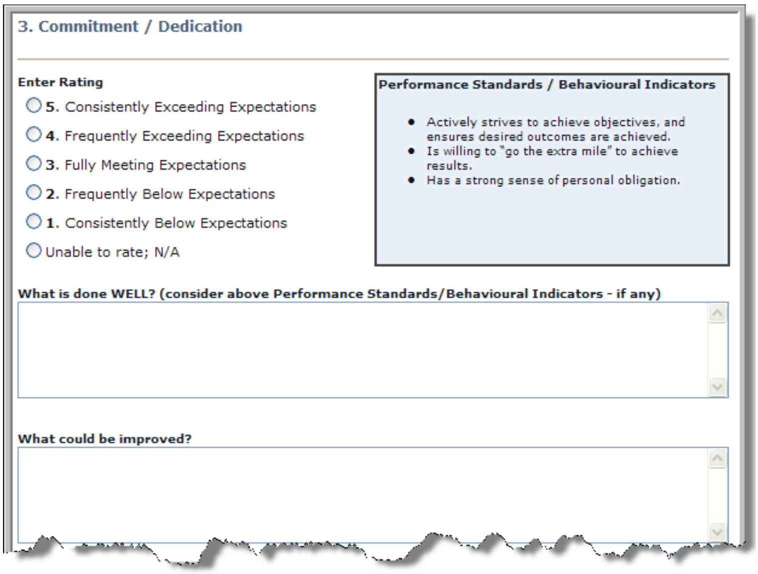
Two 360 Questionnaire Types

TalentPeak™ offers 2 types of Question Types, and is usually set up by the organization's TalentPeak™ Corporate Administrator (HR). The 360 questionnaires can either be for ratings at the **Competency Level** OR the (**Behavioural) Indicator Level**:

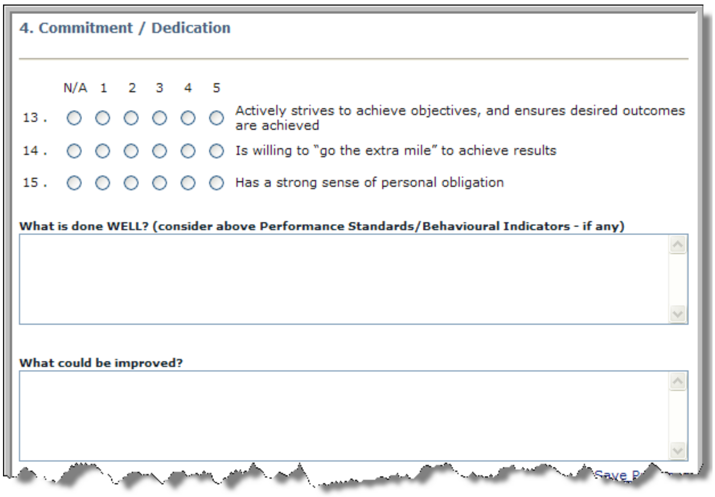
Questionnaire Type	Pros	Cons
(a) Competency Level (More suitable with 11 or more Competencies)	• Fewer items to rate, which may speed up the questionnaire completion. • Simpler 360 reports, as analysis is done at the Competency level only.	• All Behavioural Indicators per Competency have to be read through by raters, and a combined rating per Competency decided. Some raters may find this difficult to do.
(b) Indicator Level (More suitable with 10 or less Competencies)	• Some raters may find the rating of each separate Behavioural Indicator easier to do. • 360 reports include analysis at the Indicator level (deeper drilldown for those wanting it).	• More items to rate, which will take more time. • Raters may get exhausted and rush through which can lead to a poorer quality end result.

The general rule is to rather have fewer (e.g. 6 to 12) Competencies per questionnaire, than too many that can lead to rater exhaustion and poor quality results, especially if a rater has many questionnaires to complete.

Competency-Level Questionnaire Sample:



Indicator-Level Questionnaire Sample:



6000 Fairview Road, South Park Towers Charlotte NC 28210
www.talent-peak.com & User Support

Email Notifications

Example Email notification:

From: Performance Appraisal System [mailto:dontreply@appraisalsystem.info]
Sent: Thursday, August 23, 2012 10:23 AM
To: mike@talent-peak.com
Subject: 360 Feedback: Rita Hayward

Dear Mike Mathews

You are invited to provide anonymous feedback about Rita Hayward in respect of his/her working relationship with you.

Please click on the hyperlink below to access the 360 Appraisal Questionnaire for completion at your earliest convenience (but not later than the due date indicated):

https://www.talentpeak.net/email.aspx?Guid=2f64f458-a64b-43ff-bc24-dbf33d0b6083
(If you are unable to open the web page by clicking on this link, you can copy and paste the URL into your web browser)

If you do not have time to complete the entire questionnaire in one sitting, just click 'Save Progress' or ' Save and Complete Later', log out, and return later to complete it in full.

Please be assured that your feedback will remain anonymous, and will be collected securely via the vendor's website.

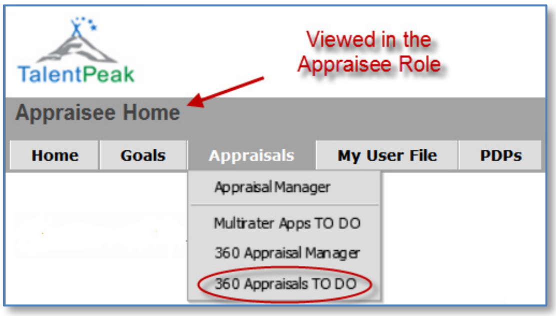
We appreciate your cooperation in completing this 360 feedback questionnaire!

NOTE: This is a system-generated email, so please do not reply to it> Please contact the person who asked you to participate if you have any questions (also if this email was sent to you in error, and you were not the intended recipient).

Internal Rater Completion of Assigned 360 Questionnaires

Although **Internal raters** also have a hyperlink in the email they receive (to open the questionnaire directly) they can also access their assigned questionnaires by going to their **Appraisee** Role (this may be the only role they have)…

…and selecting **Appraisals >> 360 Appraisals TO DO.**



There are two categories (follow the detailed instructions):

- Colleague Appraisals
- Self-Appraisals

Colleague Appraisals

- The following of your colleagues have been assigned to you for 360-degree feedback.
- Please click 'Appraise' to proceed with the 360 feedback appraisal for this person.
- If you were unable to observe this person in respect of a specific measure, select the rating option 'Unable to rate; N/A'.
- If you do not have time to complete an entire questionnaire in one sitting, just click 'Save Progress' or 'Save and Complete Later', log out, and return later to complete it in full.
- Once you have signed off an appraisal questionnaire, you will not be able to make changes to it afterwards, but you can ask your System Administrator to undo your sign off if you wish to do so.
- Please complete the appraisals by the due dates indicated.

Person to Appraise	Job Title	360 Title	Due Date	Status	
Beaumont, John	Recruitment Officer	G1: Leadership	18 May 2012	Not Started	Appraise
Small, Bob	HR Manager	Investment Team	20 Jun 2012	Completed: 3 May 2012	Appraise
Hanko, Tom	CEO	G1: Leadership	21 Aug 2012	In Progress	Appraise

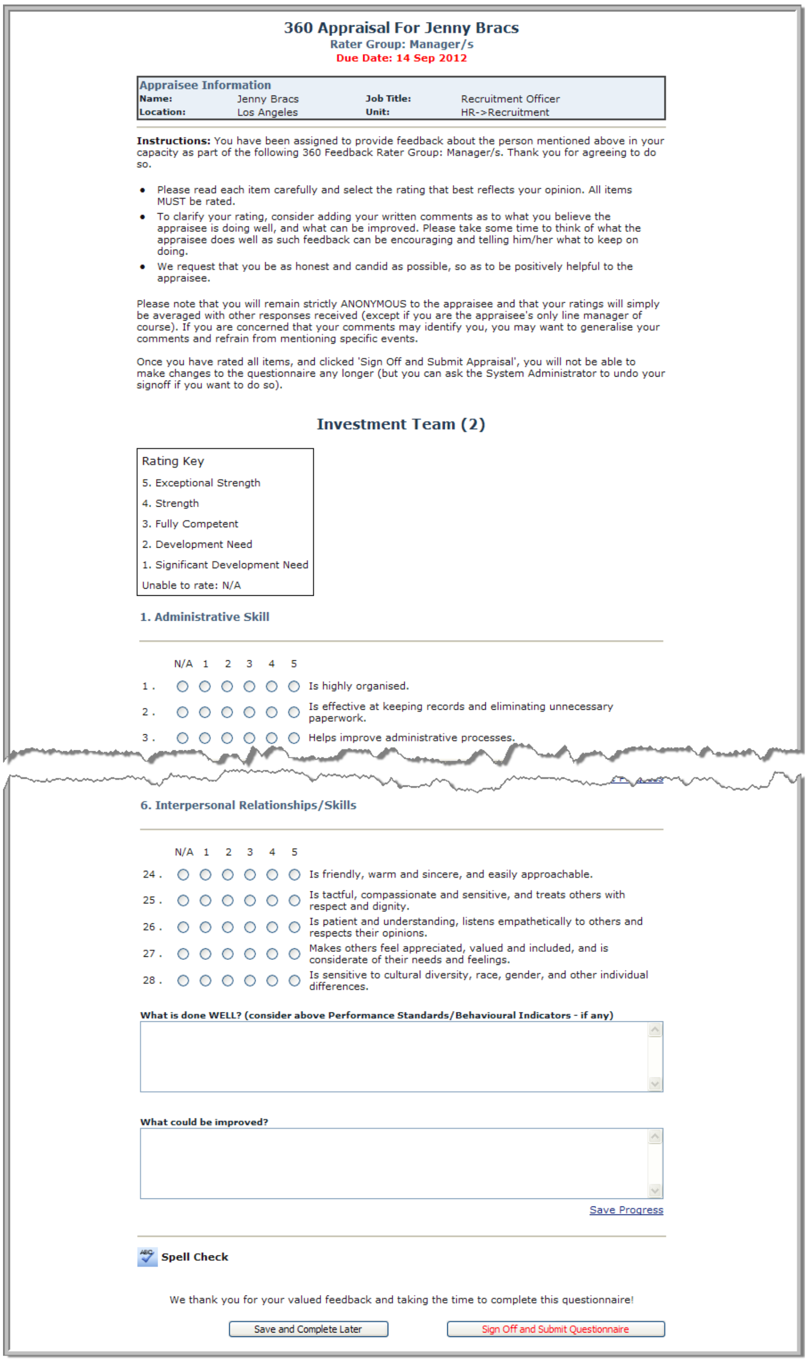
Self-Appraisals

- You have been assigned to do the 360 self-appraisal/s listed below.
- Some of your colleagues and/or customers were asked to complete the same 360 questionnaire/s in respect of how they perceive your working relationship with them.
- Your self-appraisal/s will be compared with their appraisals of you, so that the differences in perception can be identified with a view to increased awareness of how you are perceived by them, building on your strengths, and identifying areas in which you may want to improve.
- If you do not have time to complete an entire self-appraisal in one sitting, just click 'Save Progress' or 'Save and Complete Later', log out, and return later to complete it in full.
- Once you have signed off an appraisal questionnaire, you will not be able to make changes to it afterwards, but you can ask your System Administrator to undo your sign off if you wish to do so.
- Please complete your self-appraisal/s by the due date/s indicated.

Person to Appraise	Job Title	360 Title	Due Date	Status	
Warrick, Kristy	Consultant	Personal Effectiveness (2)	21 Sep 2012	Not Started	Self-Appraise

360 Appraisal Questionnaires

Following is an example of a 360 Questionnaire, with rating set at the behaviour indicator level:



360 Appraisal For Jenny Bracs
Rater Group: Manager/s
Due Date: 14 Sep 2012

Appraisee Information			
Name:	Jenny Bracs	**Job Title:**	Recruitment Officer
Location:	Los Angeles	**Unit:**	HR->Recruitment

Instructions: You have been assigned to provide feedback about the person mentioned above in your capacity as part of the following 360 Feedback Rater Group: Manager/s. Thank you for agreeing to do so.

- Please read each item carefully and select the rating that best reflects your opinion. All items MUST be rated.
- To clarify your rating, consider adding your written comments as to what you believe the appraisee is doing well, and what can be improved. Please take some time to think of what the appraisee does well as such feedback can be encouraging and telling him/her what to keep on doing.
- We request that you be as honest and candid as possible, so as to be positively helpful to the appraisee.

Please note that you will remain strictly ANONYMOUS to the appraisee and that your ratings will simply be averaged with other responses received (except if you are the appraisee's only line manager of course). If you are concerned that your comments may identify you, you may want to generalise your comments and refrain from mentioning specific events.

Once you have rated all items, and clicked 'Sign Off and Submit Appraisal', you will not be able to make changes to the questionnaire any longer (but you can ask the System Administrator to undo your signoff if you want to do so).

Investment Team (2)

Rating Key
5. Exceptional Strength
4. Strength
3. Fully Competent
2. Development Need
1. Significant Development Need
Unable to rate: N/A

1. Administrative Skill

	N/A	1	2	3	4	5	
1 .	○	○	○	○	○	○	Is highly organised.
2 .	○	○	○	○	○	○	Is effective at keeping records and eliminating unnecessary paperwork.
3 .	○	○	○	○	○	○	Helps improve administrative processes.

6. Interpersonal Relationships/Skills

	N/A	1	2	3	4	5	
24 .	○	○	○	○	○	○	Is friendly, warm and sincere, and easily approachable.
25 .	○	○	○	○	○	○	Is tactful, compassionate and sensitive, and treats others with respect and dignity.
26 .	○	○	○	○	○	○	Is patient and understanding, listens empathetically to others and respects their opinions.
27 .	○	○	○	○	○	○	Makes others feel appreciated, valued and included, and is considerate of their needs and feelings.
28 .	○	○	○	○	○	○	Is sensitive to cultural diversity, race, gender, and other individual differences.

What is done WELL? (consider above Performance Standards/Behavioural Indicators - if any)

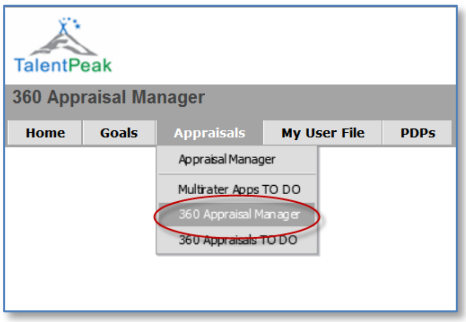
What could be improved?

Save Progress

Spell Check

We thank you for your valued feedback and taking the time to complete this questionnaire!

Save and Complete Later | Sign Off and Submit Questionnaire



360 Appraisal Reports

After your manager or HR has signed off the completed 360's you can view your completed feedback.

APPRAISALS>>360 Appraisal Manager

Click on the "**Indiv Reports**" under **Form Links** to access the 360 feedback reports.

Sample Report 1: Tabular

Competency-level Tabular Reports show the ratings per Competency only:

No	Measure / Competency / Item	Manager/s	Peers	Dir Reports	Averages	Appraisee
1	Strategic Thinking / Visioning	4	2	2.5	2.8	4
2	Business Thinking/Acumen	3	2.5	3	2.8	3
3	Team Building and Motivation	4	3.5	2	3.2	5
4	Coaching / Mentoring	4	2.5	3	3.2	2
5	Communication (Oral and Written)	5	3.5	2.5	3.7	4
6	Conflict Management	3	2.5	2.5	2.7	4
7	Creativity / Innovation	4	4	3	3.7	4
8	Decisiveness	3	3.5	3	3.2	5

Indicator-level Tabular Reports show the ratings per Behavioural Indicator as well (see red text below):

No	Measure / Competency / Item	Manager/s	Peers	Dir Reports	Averages	Appraisee
1	Commitment / Dedication	3.7	4.1	4.8	4.2	5
	1. Actively strives to achieve objectives, and ensures desired outcomes are achieved.	3	4	5	4	5
	2. Is willing to "go the extra mile" to achieve results.	4	4	4.7	4.2	5
	3. Has a strong sense of personal obligation.	4	4.3	4.7	4.3	5
	Communication (Oral and Written)	2	2.1	1.9	2	4
	1. Expresses views in a fluent, clear, [illegible] manner, with enthusiasm [illegible]dence.	[illegible]	2.3	[illegible]	[illegible]	5

Sample Report 2: Narrative

This report has as primary focus the provision of **narrative (qualitative) feedback** to Appraisees.

4. Flexibility / Adaptability

Self: 4
4
2.3
Rater Gp: 2.3

Performance Standards / Behavioural Indicators

- Is open to new ways of working, ideas and processes.
- Adapts quickly and effectively to new environments, people, and responsibilities.
- Readily adapts to stressful situations and factors outside of his/her control.

What is done WELL? (consider above Performance Standards/Behavioural Indicators - if any)

Self
I adapt quickly to new situations and responsibilities

Rater Group
Handles stressful situations well

He readily adapts to factors outside of his control.

What could be improved?

Self

Comments by different raters

Rater Group
Deon is frequently dismissive of ideas offered by others - thinking he has all the answers.

Ideas from others not always appreciated

Deon thinks others' ideas are not worthy of consideration, which can be very demotivating.

Can be temperamental at times

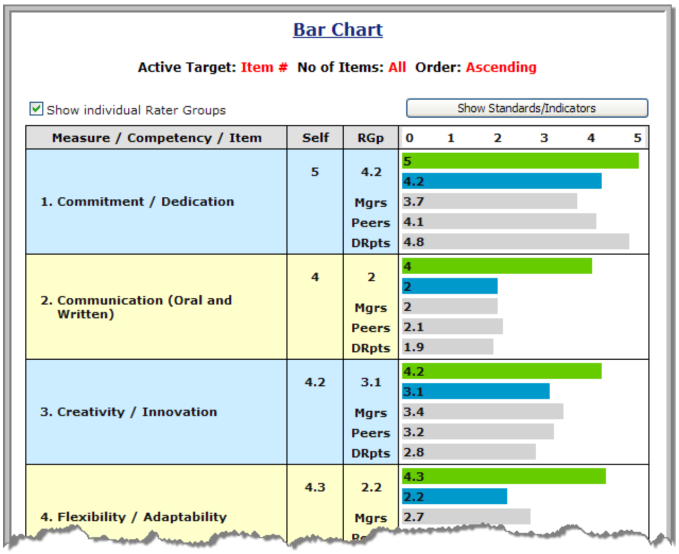
Can have a bit of a confrontational style in team meetings when he gets some opposition to his ideas.

6000 Fairview Road, South Park Towers Charlotte NC 28210
www.talent-peak.com & User Support

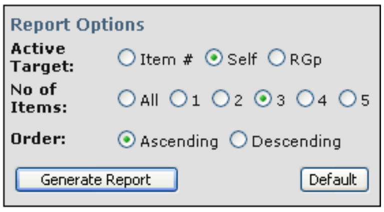
Sample Report 3: Graphical

This report has two Bar Charts

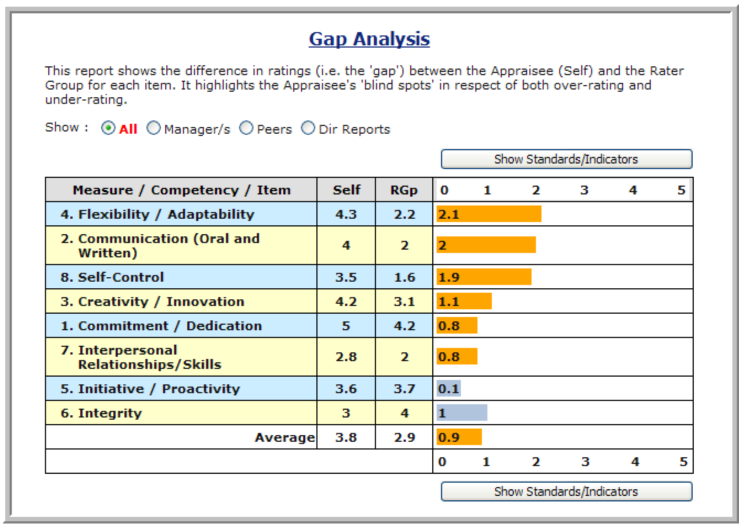
Bar Chart 1 example:



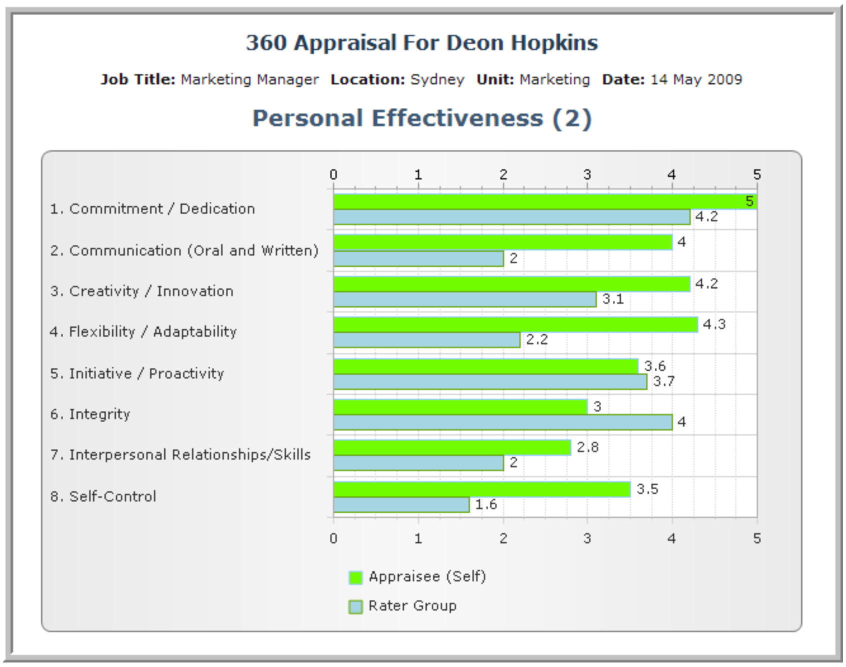
This bar chart has a filter (see below) to create dynamic “sub-reports” of any combination you wish (Active Target, No of Items, Order). This is extremely useful in analysing Appraisee Strengths and Development Needs – and to use during feedback/coaching sessions with employees.



Bar Chart 2 (Gap Analysis) example:



Sample Report 4: Graphical MAIN



THIS PAGE LEFT BANK INTENTIONALLY

6000 Fairview Road, South Park Towers Charlotte NC 28210
www.talent-peak.com & User Support