

A Closer Look at
Performance Management



Agenda

Hello there! We hope this overview shows you how BambooHR Performance Management can help you save time and better support your employees and managers.

Here are the different topics we'll cover:

- The time savings of automating performance management
- The ROI of effective performance management
- An in-depth look at BambooHR Performance Management
 - Set-up
 - Assessments
 - Feedback
 - Goals
- Measuring your impact with instant reports
- Training, customer testimonials, and awards

If you have any questions, please reply to your representative's email.

A more effective performance management system saves everyone time.



Average Time Spent Every Year on Performance Management



Automating Performance Management Helps Everyone

Managers:

80% less time on employee assessments

Employees:

50% less time on self assessments

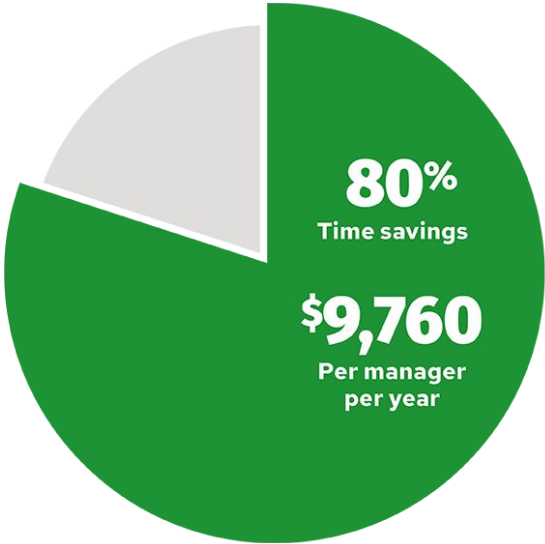
HR: 90% less time managing the process



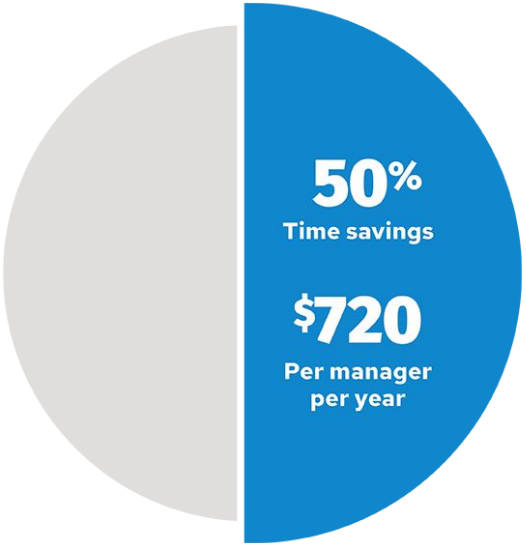
A more effective performance management system improves business and employee outcomes.



A more effective performance management system saves you money.



**Managers making
\$75,000**



**Employees making
\$55,000**

How can BambooHR Performance Management help you?



We Have You Covered

BambooHR is used by **10,000+ companies** and **700,000+ employees** throughout the world.



Engage Your Employees

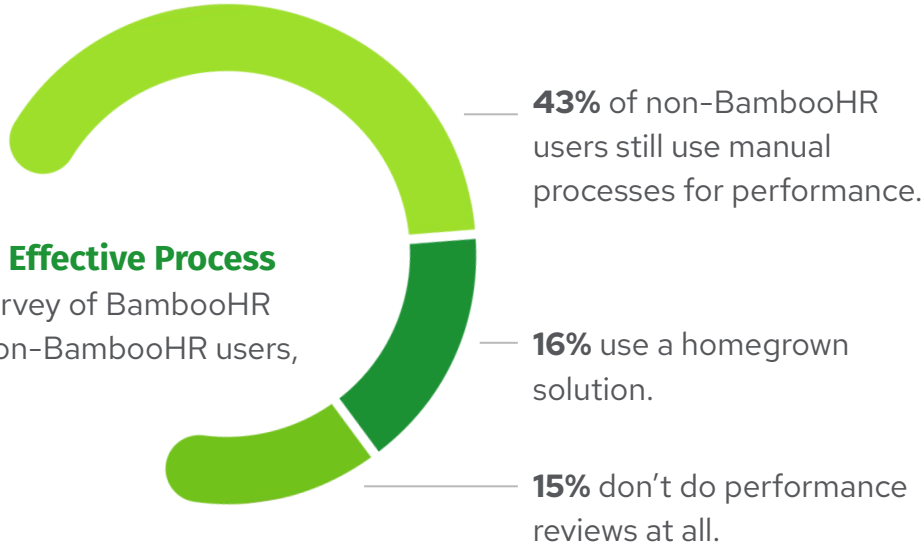
4.38 out of 5

Average employee engagement score from managers using BambooHR Performance Management

How can BambooHR Performance Management help you?

Get a More Effective Process

In a 2022 survey of BambooHR users and non-BambooHR users,



BambooHR Performance Management users were **12–15% more likely** to say they have an **effective performance review process** than those using manual or homegrown solutions.



INTERNATIONAL
SCHOLARSHIP &
TUITION SERVICES



Jennifer Fisher

Director of People and Culture



INDUSTRY | Education

Program Administration



LOCATION | Nashville, TN



NUMBER OF EMPLOYEES | 26-100

How Much Could I Really Save?

BambooHR Customer Case

Time Savings

- Assessments only take **15 minutes**.
- Managers spend **50% less time** filling out employee reviews.

Cost Savings

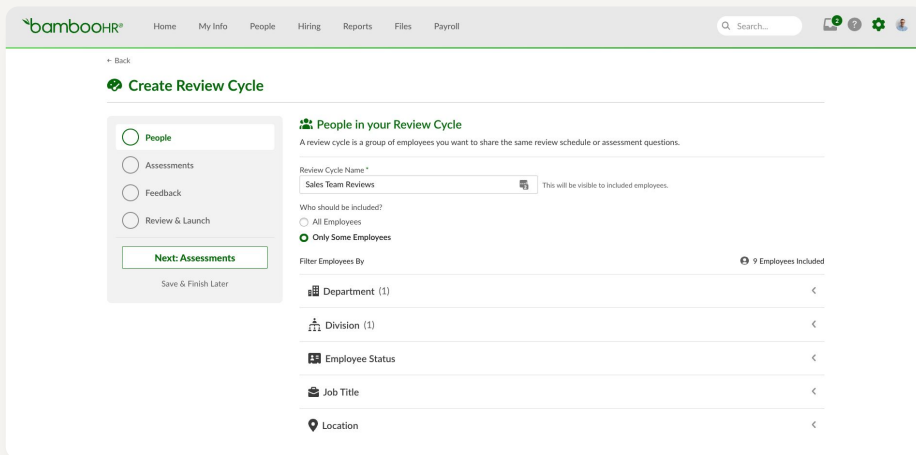
- \$40,000 saved annually

Increased Visibility

“It gives us better visibility into where everyone is. If everyone is going in the same direction, we are so much more productive. If everyone is meeting their goals, that means our company is most likely meeting its goal.”

Jennifer Fisher, Director of People and Culture | International Scholarship and Tuition Services

Quick and Easy Set-Up

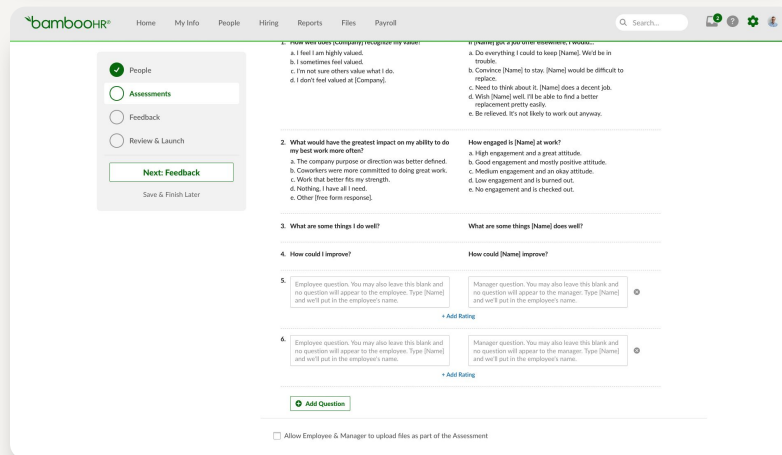
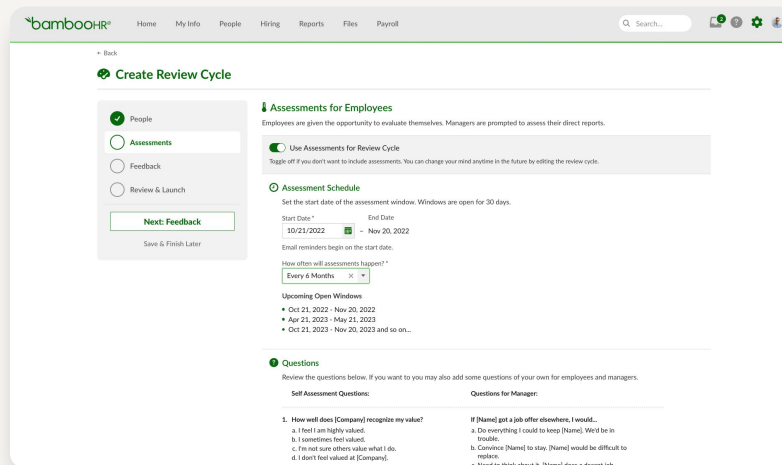


Turn on Performance Management with just a few clicks

1. Create a new review cycle for all employees or a specific team.
2. Set the assessment schedule.
3. View standard questions, and add custom questions (optional).
4. Enable Feedback for all employees or a specific team.
5. Preview review cycle, and turn it on or save it as a draft.
6. Enable Goals for all employees or a specific team.

Review Cycle

1. Create a new review cycle for all employees or a specific team.
2. Set the assessment schedule.
3. View standard questions, and add custom questions (optional).



Feedback

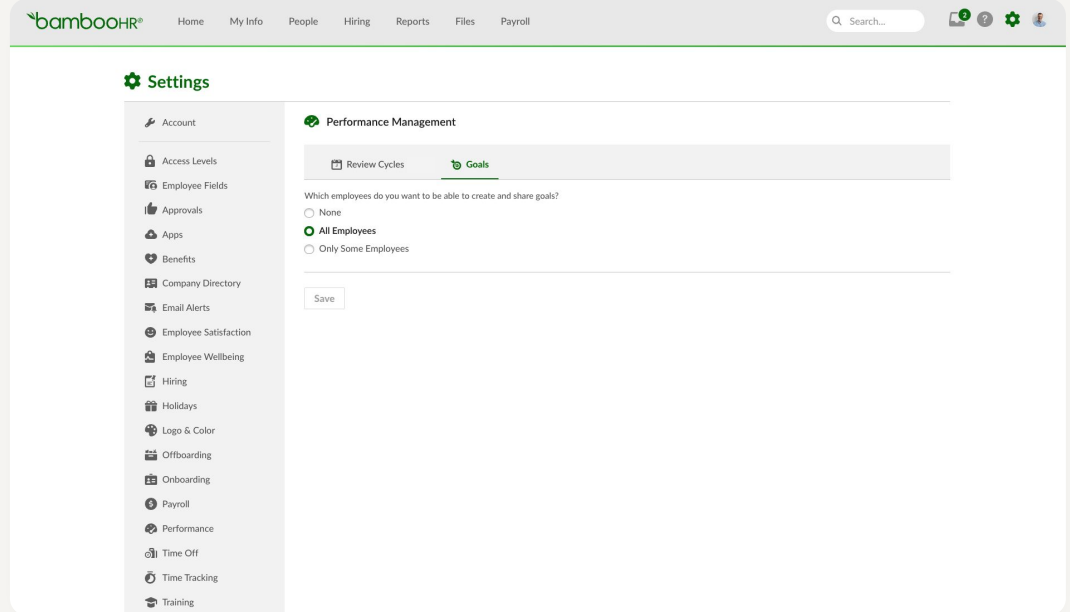
4. Enable Feedback for all employees or a specific team.
5. Preview review cycle, and turn it on or save it as a draft.

The screenshot shows the 'Create Review Cycle' page in the BambooHR application. The page is divided into several sections:

- Navigation:** Top bar with 'bamboohr' logo and links for Home, My Info, People, Hiring, Reports, Files, and Payroll. A search bar is on the right.
- Progress:** A vertical sidebar on the left shows steps: 'People' (checked), 'Assessments' (checked), 'Feedback' (selected), and 'Review & Launch' (unselected). A 'Next: Review' button is at the bottom of this sidebar.
- Feedback for Employees:** A section with a toggle switch for 'Use Feedback for Review Cycle', which is currently turned on. A note below says 'Toggle off if you don't want to include feedback. You can change your mind anytime in the future by editing the review cycle.'
- Feedback Schedule:** A section titled 'Feedback Schedule' with the text 'We will send inbox and email reminders to managers to request feedback on their employees on the date below.' It includes a 'Date' field set to '10/07/2022' and a dropdown menu for 'How often should managers be prompted?' set to 'Every 6 Months'. Below this is a list of 'Upcoming Reminder Dates': 'Oct 7, 2022', 'Apr 7, 2023', and 'Oct 7, 2023 and so on...'. There is a 'Save & Finish Later' link at the bottom of this section.
- Questions:** A section titled 'Questions' with the text 'Below are the questions we'll ask for feedback about the employee. The employee receiving feedback WILL NOT SEE any of the feedback left for them.' It contains two numbered questions:
 1. What are some things [Name] does well?
 2. How could [Name] improve?

Goals

6. Enable Goals for all employees or a specific team.



***A Simpler, More Effective Approach
to Performance Reviews***

Self Assessment

How well does Your Own Co recognize my value? *

-Select-

What would have the greatest impact on my ability to do my best work more often? *

-Select-

What are some things I do well? *

How could I improve? *

[Attach file\(s\)](#)

Submit

Save & Finish Later

Manager Assessment

Charlotte WILL NOT SEE Your Answers to These 2 Questions

If Charlotte got a job offer elsewhere, I would... *

-Select-

How engaged is Charlotte at work? *

-Select-

Charlotte WILL SEE Your Answers to The Following Questions

What are some things Charlotte does well? *

How could Charlotte improve? *

[Attach file\(s\)](#)

Submit

Save & Finish Later

Assessments

Self-assessment questions help employees reflect on their performance and level of engagement.

Manager assessment questions help reduce bias and get managers to focus on what matters most.


Manager Assessment

Questions 1 & 2

- These inform the employee performance report (see the report section).
- Employees will not see the answers to these questions.

Questions 3 & 4

- These examine what the employee is doing well and what needs improvement.
- Employees will see the answers to these questions.
- Custom questions will appear below.

 **Manager Assessment**

Charlotte WILL NOT SEE Your Answers to These 2 Questions

If Charlotte got a job offer elsewhere, I would... *

-Select-

Do everything I could to keep Charlotte. We'd be in trouble.
Convince Charlotte to stay. Charlotte would be difficult to replace.
Need to think about it. Charlotte does a decent job.
Wish Charlotte well. I'll be able to find a better replacement pretty easily.
Be relieved. It's not likely to work out anyway.

How engaged is Charlotte at work? *

-Select-

High engagement and a great attitude.
Good engagement and a mostly positive attitude.
Medium engagement and an okay attitude.
Low engagement and is burned out.
No engagement and is checked out.

Charlotte WILL SEE Your Answers to The Following Questions

What are some things Charlotte does well? *

How could Charlotte improve? *

What project has Charlotte performed the best on this quarter and why? *

[Attach file\(s\)](#)

Submit Save & Finish Later

Employee Self-Assessment

Questions 1 & 2

- These help the organization gauge the employee's level of engagement and if they have the support they need.

Questions 3 & 4

- These prompt self-reflection on what the employee feels they're doing well and what needs improvement.
- Custom questions will appear below.

What would have the greatest impact on my ability to do my best work more often? *

-Select-

The company direction or purpose was better defined.

Coworkers were more committed to doing great work.

Work that better fits my strengths.

Nothing, I have all I need.

Other



Self Assessment

How well does Your Own Co recognize my value? *

-Select-

I feel I am highly valued.

I sometimes feel valued.

I'm not sure others value what I do.

I don't feel valued at Your Own Co.

What are some things I do well? *

How could I improve? *

What is your favorite project you've worked on this quarter and why? *

[Attach File\(s\)](#)

Submit

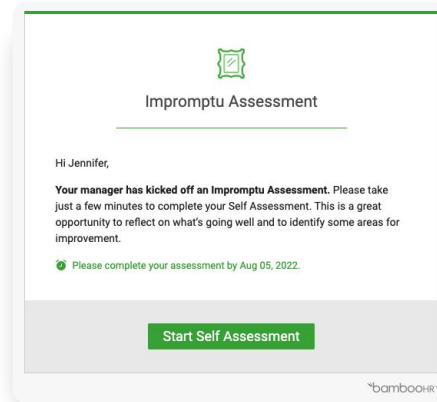
Save & Finish Later

Notifications for Employees and Managers

Email notifications remind employees to complete self assessments.

Managers receive:

- Notifications when employees complete their self assessment
- Reminders to complete their employee assessments
- Reminders to complete their own self assessment



Impromptu Assessment

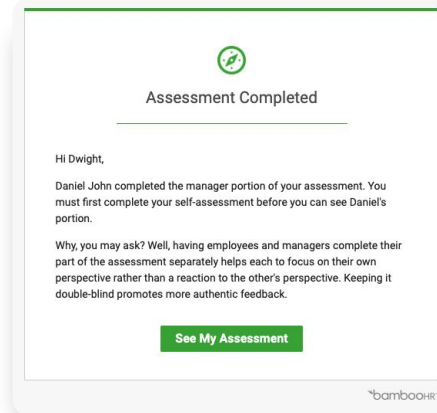
Hi Jennifer,

Your manager has kicked off an Impromptu Assessment. Please take just a few minutes to complete your Self Assessment. This is a great opportunity to reflect on what's going well and to identify some areas for improvement.

Please complete your assessment by Aug 05, 2022.

[Start Self Assessment](#)

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Assessment Completed

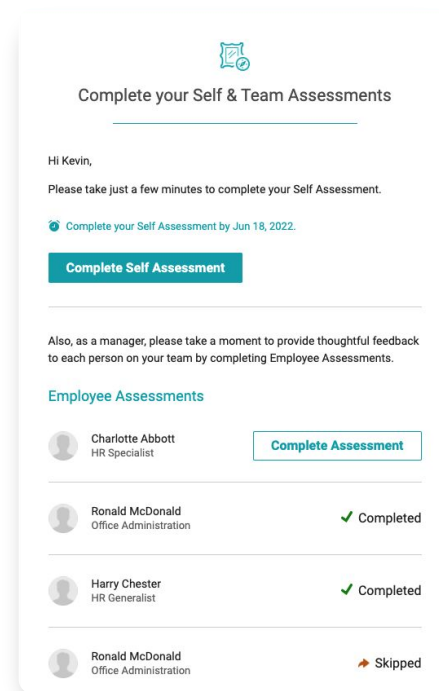
Hi Dwight,

Daniel John completed the manager portion of your assessment. You must first complete your self-assessment before you can see Daniel's portion.

Why, you may ask? Well, having employees and managers complete their part of the assessment separately helps each to focus on their own perspective rather than a reaction to the other's perspective. Keeping it double-blind promotes more authentic feedback.

[See My Assessment](#)

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Complete your Self & Team Assessments

Hi Kevin,





Please take just a few minutes to complete your Self Assessment.

[Complete your Self Assessment by Jun 18, 2022.](#)

[Complete Self Assessment](#)

Also, as a manager, please take a moment to provide thoughtful feedback to each person on your team by completing Employee Assessments.

Employee Assessments

 Charlotte Abbott HR Specialist	Complete Assessment
 Ronald McDonald Office Administration	✓ Completed
 Harry Chester HR Generalist	✓ Completed
 Ronald McDonald Office Administration	✗ Skipped

Flexible 360° Feedback

Request Feedback Whenever You Need It

In addition to the formal feedback cycle, managers can request feedback on specific employees at any time.

This gives managers more flexibility to review employee performance. For example:

- When an employee is up for promotion
- After an important project

The screenshot shows a performance management dashboard for Melissa Trinh. The top navigation bar includes Personal, Job, Documents, Training, Time Off, Performance (selected), Benefits, Pay Info, Notes, and More. The left sidebar shows employee details: Hire Date (Dec 25, 2017), ID (652), Full Time, HR, and Location (Lindon, Utah). The main content area has tabs for Goals, Feedback (selected), and Assessment. A dropdown menu is set to 'Last 6 Months'. A message states 'Just so you know, feedback is hidden from Melissa.' Below this is a 'Request feedback about Melissa' section with a search box and a 'Send Request' button. A list of pending requests is shown, including one from Jack Kerry (Benefits Administrator) and one from Stephanie Lewis (Corporate Comptroller), both with a 15-day deadline.

The modal displays a request for feedback on Carlos Santana. It includes a header 'Please Provide Feedback About Carlos' with a person icon. The text reads: 'Hi Mickey, Please take a few minutes to **provide feedback about Carlos Santana**. Share your insights into what Carlos does well and help identify opportunities for improvement.' A deadline is noted: 'The deadline for submitting this feedback is May 6, 2022.' Below this is a profile card for Carlos Santana, identified as a 'Guitarist Extraordinaire' from California. A lock icon and text state: 'Remember, your feedback is not visible to Carlos.' At the bottom is a blue 'Give Feedback' button.

Request Feedback from Anyone in the Company

Managers can easily request feedback from anyone in the company about any of their team members.

Feedback Status More ▾

01/01/2020 - 04/22/2022 All Employees Showing All

Receiving Feedback Giving Feedback

Employee ↑	Receiving Feedback From	Date Completed	Due Date
Ana Delgado (1)	Daniel Dean	--	02/09/2021 Expired
	✓ Javier Cruz	09/25/2020	10/10/2020 Expired
	Brandon Bell	--	05/11/2021 Expired
✓ Kenny Whithers (1)	✓ Eric Serdar	06/24/2021	07/09/2021 Expired
Stephanie Lewis (3)	Robert Jackson	--	12/15/2021
	Cheryl Barnett	--	12/15/2021
	Adam Hunter	--	12/15/2021

Automated Goal Tracking

Daniel John
Senior Director of HR

Personal Job Documents Training Time Off Timesheet **Performance** Benefits More

801-724-6600
801-867-5309
ddean+djohn@bamboohr...

Hire Date
Jan 1, 2014
8y - 6m - 5d

201
Full Time
HR
Western States
Lindon, Utah

Manager
Jennifer Caldwell
VP, HR

Direct Reports
Ana Delgado
Angela Gosslin
Charlotte Abbott
Dan Greetly
Dwight Goodman

Performance

Goals Assessment

New Goal Status: In Progress

Improve Sales Retention Numbers By 10% in Q2
Due Aug 5, 2022

Sales numbers.jpeg
Responses_data.csv
2022 Guide to Retention - General.pdf
Add Comment

Implement new performance review process (perf...)
Due Aug 31, 2022

1. Introduce and train department heads on new performance review process by end...

2 Comments

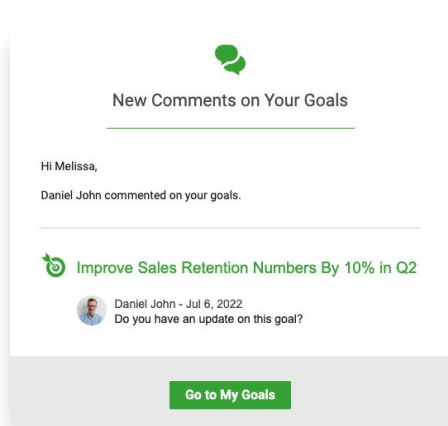
Goals

Employees and managers can:

- Create goals
- Add descriptions
- Add attachments
- Assign due dates
- Share goals with other team members
- Submit progress reports as they go
- Close and reopen goals

Managers can even align employee goals with one of their own, adding accountability and encouraging goal completion.

Goals: Tracking and Notifications



New Comments on Your Goals

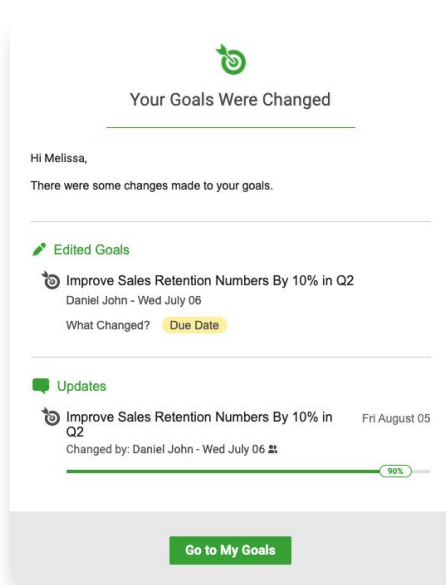
Hi Melissa,

Daniel John commented on your goals.

Improve Sales Retention Numbers By 10% in Q2

Daniel John - Jul 6, 2022
Do you have an update on this goal?

[Go to My Goals](#)



Your Goals Were Changed

Hi Melissa,

There were some changes made to your goals.

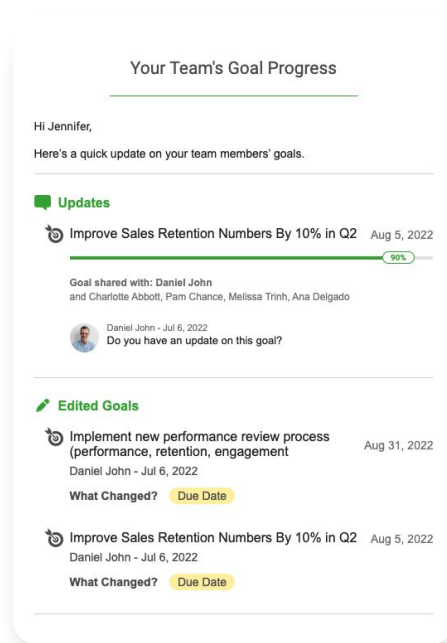
Edited Goals

Improve Sales Retention Numbers By 10% in Q2
Daniel John - Wed July 06
What Changed? [Due Date](#)

Updates

Improve Sales Retention Numbers By 10% in Q2 Fri August 05
Changed by: Daniel John - Wed July 06 [👤](#)

[Go to My Goals](#)



Your Team's Goal Progress

Hi Jennifer,

Here's a quick update on your team members' goals.

Updates

Improve Sales Retention Numbers By 10% in Q2 Aug 5, 2022 90%

Goal shared with: Daniel John and Charlotte Abbott, Pam Chance, Melissa Trinh, Ana Delgado

Daniel John - Jul 6, 2022
Do you have an update on this goal?

Edited Goals

Implement new performance review process (performance, retention, engagement) Aug 31, 2022
Daniel John - Jul 6, 2022
What Changed? [Due Date](#)

Improve Sales Retention Numbers By 10% in Q2 Aug 5, 2022
Daniel John - Jul 6, 2022
What Changed? [Due Date](#)

Employees and managers are notified when changes or comments are made within a goal.

Managers receive emails with a roundup of their team's goal progress.

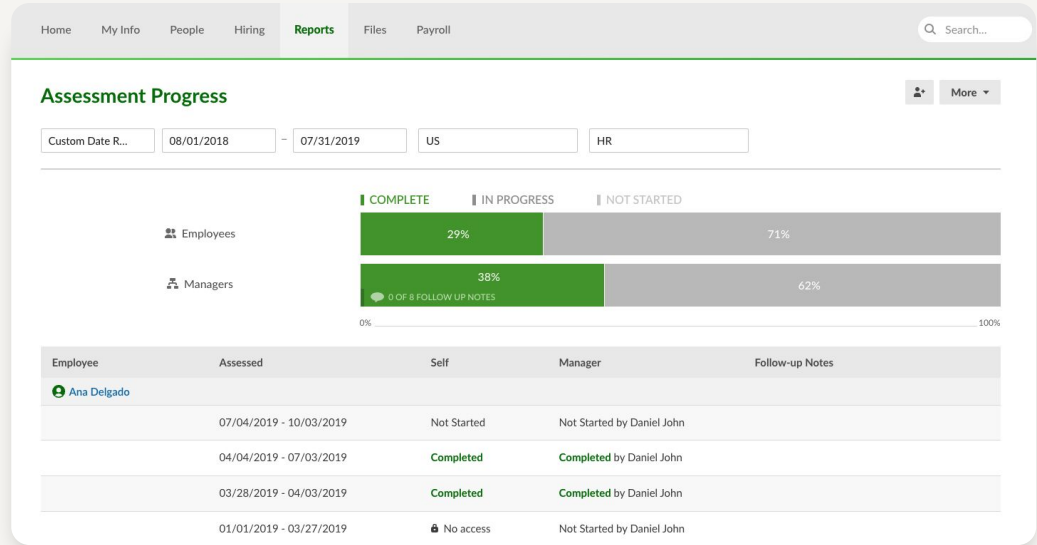
Instant, Insightful Reports

Assessment Progress Report

This report provides a current overview of all assessments: completed, in progress, and unstarted. It also shows you anyone in your system who doesn't have access, e.g., contractors.

What it helps you do:

- Track and measure participation in performance reviews.
- Encourage completion and manager follow-ups with employees.

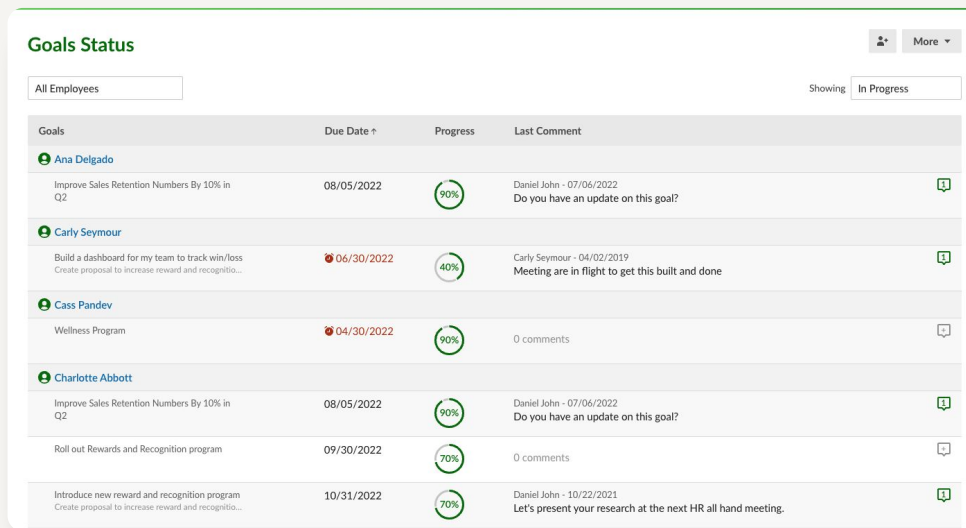


Goal Status Report

This report shows you the names, due dates, and progress percentage of each employee's goals.

What it helps you do:

- Track where employees are in their goals and see the goals they've completed.
- Give managers an overview of their direct or indirect reports' goals.



The screenshot displays a 'Goals Status' report interface. At the top, there is a header 'Goals Status' with a 'More' dropdown menu. Below the header, there is a filter for 'All Employees' and a 'Showing In Progress' indicator. The main content is a table with the following columns: 'Goals', 'Due Date', 'Progress', and 'Last Comment'. The table lists goals for four employees: Ana Delgado, Carly Seymour, Cass Pandev, and Charlotte Abbott. Each goal entry includes the goal description, the due date, the progress percentage (indicated by a circular progress indicator), and the last comment with a date and a comment icon.

Goals	Due Date	Progress	Last Comment
Ana Delgado Improve Sales Retention Numbers By 10% in Q2	08/05/2022	90%	Daniel John - 07/06/2022 Do you have an update on this goal?
Carly Seymour Build a dashboard for my team to track wins/loss Create proposal to increase reward and recognitio...	06/30/2022	40%	Carly Seymour - 04/02/2019 Meeting are in flight to get this built and done
Cass Pandev Wellness Program	04/30/2022	90%	0 comments
Charlotte Abbott Improve Sales Retention Numbers By 10% in Q2	08/05/2022	90%	Daniel John - 07/06/2022 Do you have an update on this goal?
Roll out Rewards and Recognition program	09/30/2022	70%	0 comments
Introduce new reward and recognition program Create proposal to increase reward and recognitio...	10/31/2022	70%	Daniel John - 10/22/2021 Let's present your research at the next HR all hand meeting.

Feedback Status Report

This report shows you who has completed a feedback request, who has received feedback (and from whom), and which requests are past due.

What it helps you do:

- Ensure timely feedback to keep review cycles in motion.
- Give managers more visibility into who's been receiving or giving feedback, making sure no one is getting overtasked or not receiving feedback.

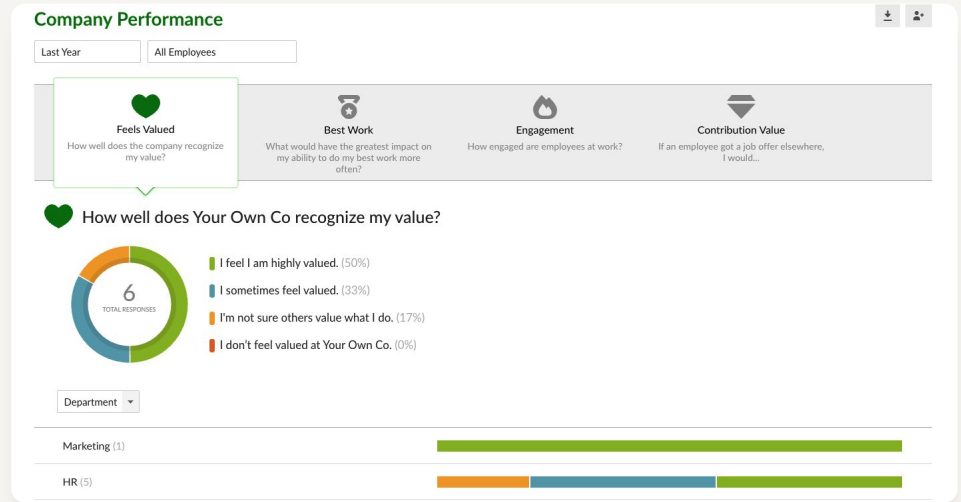
Employee ↑	Receiving Feedback From	Date Completed
✓ Ana Delgado (1)	✓ Javier Cruz	09/25/2020
✓ Daniel John (1)	✓ John Ryan	07/01/2019
✓ Jessie Williams (1)	✓ Javier Cruz	06/30/2019

Company Performance Report

This shows you overall performance ratings by department, team, location, and more.

What it helps you do:

- Tell the story of how employee performance is going within your organization and how you can improve employee performance over time.
- Quickly analyze performance data in aggregate for the entire company, including departments, managers, and locations.
- Get actionable insight into how performance results compare across various departments, which teams feel valued, and how performance has improved over time.

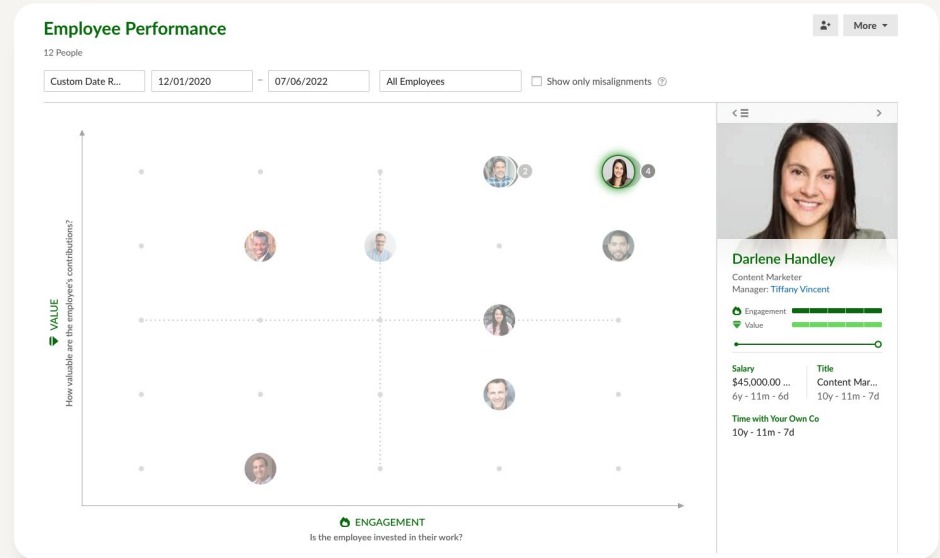


Employee Performance Report

This report shows you how valued each employee feels versus how well they perform.

What it helps you do:

- Understand how your employees are performing and how to best help them succeed.
- Spot top performers for promotions, succession planning, etc. and low performers who may need additional support and training.



Awards and Recognition



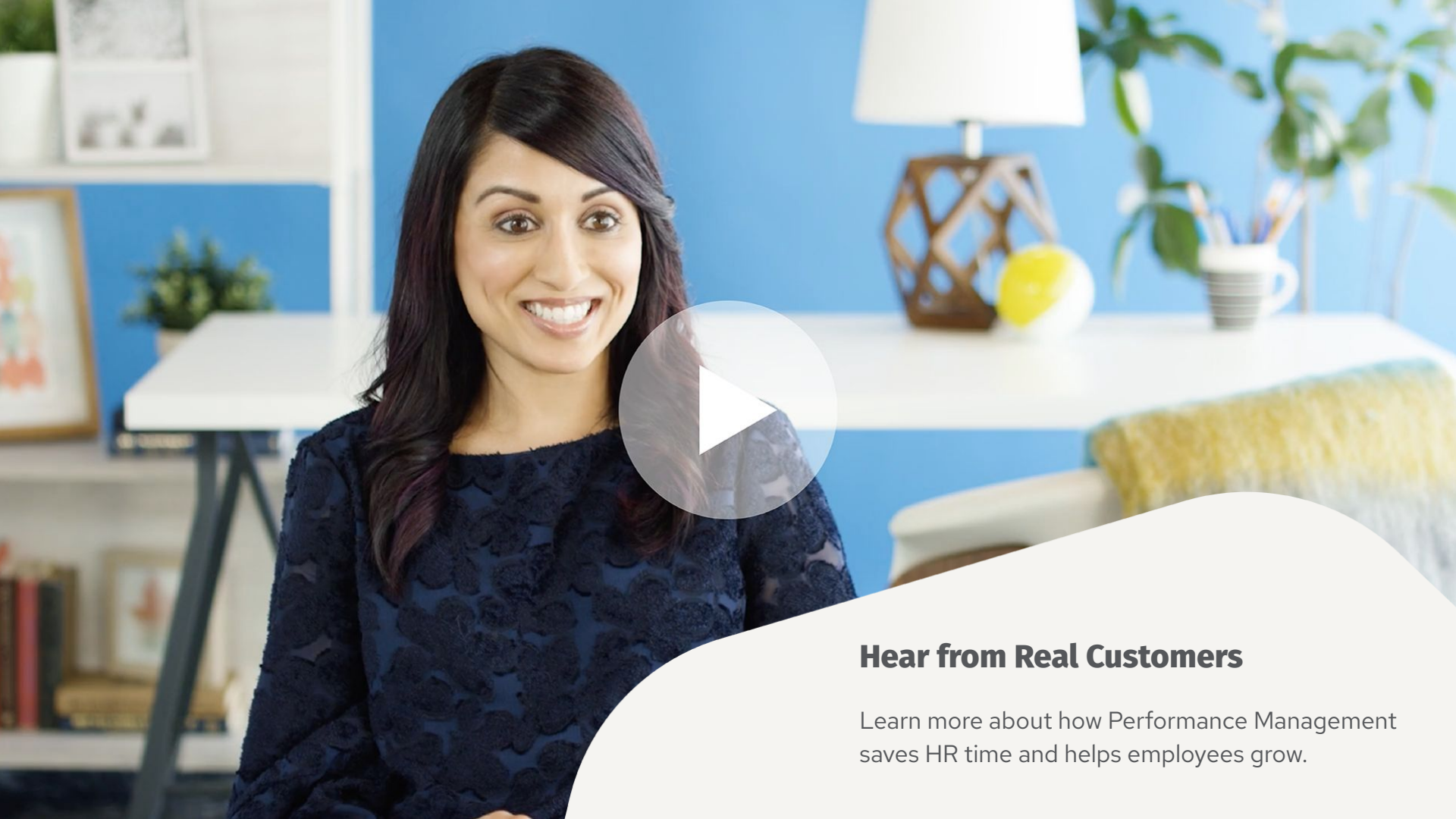
Training Employees and Managers

To get you started the right way, we offer a comprehensive, hands-on free training course for our performance management system, including training material for all employee levels.

[Check Out the Course](#)

You can access this course through your BambooHR trial account. Don't have a free trial yet? [Start one today](#)—no strings attached, and no credit card required.





Hear from Real Customers

Learn more about how Performance Management saves HR time and helps employees grow.

Ready to get started with Performance Management?

Send your sales representative a reply, and they'll get back to you right away!

