

Workbook

Ditch the Word Documents: Your checklist for digitalising performance reviews

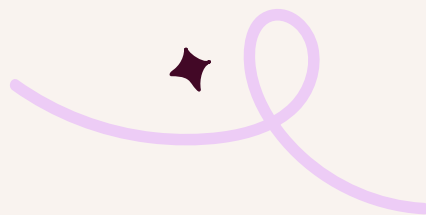
Workbook

Your checklist for digitalising performance reviews

Part of the process of digitalising your performance reviews is defining what you'll include now, next and later. It might be as simple as getting your annual reviews online. It might be much more.

Use the checklist on the following pages to detail your current process, your Minimum Viable Product (MVP) for moving online, and your aspirational process.

Appraised Customers sometimes use a plan like this to show their Senior Leadership Team how digitalisation can be simple – and how it can be just the beginning of a journey towards continuous performance management.



Defining your MVP

How does your current process look and what would you want to keep, add or leave behind?

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Planning for digitalisation

Moving online gives you the opportunity to build on your performance management process over time. Of course, there will be things you need to do now (your MVP) but are their other elements that you'd like to adopt in future?

	Now	Next	Later
These three are often the basics that customers launch their new process with.	<u>Objective Setting</u>		
	<u>Mid-Year Review</u>		
	<u>Annual Review</u>		
With proposed changes to the Employment Rights Bill, these elements will grow in importance	<u>Day one Onboarding Check-in</u>		
	<u>Day 1 Onboarding Check-in</u>		
	<u>Month 1-2-3 Onboarding Check-ins</u>		
	<u>End of Probation Review</u>		
	<u>Weekly or Monthly Manager Check-Ins</u>		
	<u>Quarterly Review</u>		
	<u>360 Feedback</u>		
	<u>Instant Feedback</u>		
	<u>Colleague Recognition</u>		
	<u>Wellbeing Check-Ins</u>		
	<u>Remote or Hybrid Working Check-ins</u>		
	<u>Career Planning Check-Ins</u>		
	<u>Buddy Check-Ins</u>		
	<u>Personal Development Check-Ins</u>		
	<u>Stay Conversations</u>		
	<u>Pay Reviews and Calibration</u>		
	<u>Talent Reviews</u>		
	<u>Succession Reviews</u>		
	<u>Regular Board Reporting</u>		

Plan your Year 1

Plot down your first year of continuous performance management.

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How Appraisd supports your people

What's different about Appraisd?

- We're process-agnostic – Appraisd adapts to your way of working
- Intuitive and user-friendly – no need for hand-holding
- Modular approach – grow at your own pace
- Integrates seamlessly with over 25 HRIS platforms, MS Teams, Slack and Outlook
- Powerful reporting gives you a clear view of performance at all levels

Introducing a new system doesn't have to be painful

- Expert guidance and a named Customer Success Manager
- Fast, friendly responses from real people – no bots
- Flexible to your pace of change: roll out in stages
- Minimal training needed; managers and employees just get it
- Continued support to help you evolve your performance strategy over time

Take a tour of Appraisd

[Book a demo of Appraisd](#) to see the system in action.

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I have to say, working with Appraisd is an utter dream compared to some of the other systems we use!

Bethan Humphreys, People Operations Manager