

A Buyer's Guide to Performance Management Software

How to choose the right performance management system for your organisation





Contents

- Introduction
- What is performance management software?
- What features should you look for in a performance management system?
- The benefits of using performance management software
- How to build a business case for performance management software
- What does a good performance management process look like?
- Questions to ask any performance management software supplier
- Implementing performance management software in your business
- Customer reviews and testimonials
- Your performance management software checklists
- About Appraisd by Talos360

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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





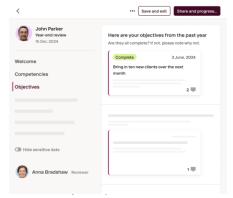
Introduction

In the past, performance management was commonly seen as an arduous annual event, more for the sake of compliance than an opportunity for reflection and discussion of ambition.

But today's performance management is much more than a process. In fact, data from the CIPD shows a positive impact of performance management on employee performance, health, wellbeing and job satisfaction.

The same report shows that although half of companies (48%) have at least a basic form of performance management, just 28% have a systemised approach that includes the important elements of objective setting, monitoring of objectives, feedback and accountability.

Free Performance Management Review



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Companies that focus on their people's performance are 4.2 times more likely to outperform their peers and generate an average of 30% higher revenue growth

McKinsey, In the spotlight: Performance management that puts people first 2024





A systemised to performance management holds many benefits, here are just a few of them:

Increased employee performance and engagement

Structured performance management boosts employee performance by setting clear goals, providing regular feedback, aligning individual efforts with organisational objectives and fostering open communication between employees and managers.

Reduced HR time spent on administrative tasks

HR shouldn't lose time to clunky tools and administrative burden. A performance management system modernises your process, reduces administration and automates the time-consuming manual tasks.

Strategic business alignment

A performance management system makes it easy for people to see how their work contributes to the wider goals of the organisation. Having clear goals provides employees with a sense of purpose and drives organisational alignment.

Increased employee ownership of their development and career progression

A performance management system should drive cultural transformation from the ground up. Automated review cycles, streamlined templates and gentle reminders encourage people to take the initiative, and proactively manage performance and development.

Increased employee productivity

Objectives are bound to fail if you only review them once a year. You miss out on opportunities to adapt, improve them, or employees forget about them entirely. A performance management system encourages employees and managers to regularly review objectives together.

More purposeful conversations

Effective performance reviews are all about facilitating the right conversations and the right outcomes. A performance management system should include flexible templates allow you to tailor the content of your reviews to suit your organisation.

Data-driven insights

Whether you want an overview of every objective that your people are working on or need to know that performance conversations are taking place, a performance management system should make it easy for you to extract and export the answers.

Top talent retention and reduced employee turnover

Performance management supports top talent retention by offering growth opportunities, career development, and recognition. When employees see a clear path for advancement, they are more likely to stay with the organisation.



What is performance management software?

Performance management software is a cloud-based system designed to transform traditional, often manual, performance reviews into a continuous, engaging, and datadriven process. Unlike legacy appraisal methods, performance management software is accessed regularly by employees and managers, enabling ongoing feedback, objective tracking, and career development.

A modern performance management system helps organisations:

- Set and monitor goals: Align individual and team objectives with wider organisational priorities, ensuring employees understand how their work contributes to business
- success.

Facilitate regular check-ins: Move beyond once-a-year reviews to frequent, meaningful

- conversations that support progress and professional growth.
 - Provide real-time feedback and recognition: Encourage continuous improvement and
- reward achievements as they happen.
 - Support personal development: Track training, skills development, and career
- aspirations, giving employees clarity over their growth opportunities.
 - Enable talent and succession planning: Identify high-potential employees, map talent
- pipelines, and mitigate risks around key roles.
 - Deliver actionable reporting: Consolidate performance data into reports and
- dashboards for HR and leadership, helping guide strategic decisions.
 - **Reduce administrative burden:** Automate routine tasks, apply AI to streamline workflows, and minimise time spent on manual processes.

Performance management software helps to build engagement, accountability, and alignment across the organisation, so people get the very best from one another at work.



What performance management software features should you look out for?

Choosing the right performance management system is critical to ensuring your people processes are efficient, compliant, and genuinely drive better performance. Below are the key features to look for when evaluating software options.

1. Performance reviews and check-ins

A strong performance management system should securely automate, facilitate, and store all performance reviews. It should support meaningful, compliant conversations between employees and their managers, ensuring every discussion is correctly recorded.

Look for tools that enable >95% completion rates without manual chasing, and that provide clear reporting on completion status and any areas of non-compliance. The system should also deliver analysis of ratings and other review data, allowing HR to see trends across departments, teams, and over time.

2. Objectives and goal setting

Your performance management system should allow you to store and track all individual and team objectives whether OKRs, SMART goals, or other frameworks. Reporting should make it easy for HR and heads of department to monitor goal status, completion, and assessments. Continuous tracking is essential, helping ensure objectives remain relevant and meaningful throughout the year rather than becoming a 'set and forget' exercise.

3. Feedback and recognition

Instant feedback capabilities encourage a culture of continuous improvement and recognition. A good performance management system enables employees to receive constructive pointers and praise in real time, reinforcing positive behaviours and performance.

Managers should be encouraged and prompted to make recognition a regular practice. Additionally, the system should incorporate **360° feedback** in a way that fits your organisation's culture and feedback philosophy.



4. Personal development

The best systems make personal development planning easy and actionable. Each employee should have a clear development plan that supports their career growth while demonstrating the organisation's commitment to their future.

HR should be able to report accurately on training needs in real time, enabling proactive planning and budgeting. The performance management system should also help identify and catalogue skills across the workforce, giving a clear view of organisational capability.

5. Talent and succession profiling

Robust talent management features are vital for identifying and nurturing future leaders. Look for systems that support tools such as the **nine-box grid** (performance vs potential or performance vs behaviour), helping you visualise the talent pipeline and identify potential risks.

Your performance management system should also highlight critical roles where turnover could significantly impact operations and show whether suitable successors are in place or being developed.

6. Reporting and analytics

Comprehensive reporting tools are essential. The right performance management system will let you easily access both built-in standard reports and custom reports to meet your specific needs.

Leading systems also provide an **API** to extract data for use in enterprise business intelligence platforms such as **Power BI**, enabling deeper analysis and integration with broader HR analytics.

7. Integrations

A performance management system should integrate seamlessly with your existing HR systems, eliminating manual user administration and data duplication.

Top-tier systems allow you to create **rule-based workflows**, defining which forms, processes, and procedures apply to employees based on their role, department, or seniority level.



8. Manager tools

Effective manager tools make all the difference. Look for a clear **dashboard** view that lets managers see their team's progress and status at a glance. Managers of managers should also have visibility of broader team structures and individual manager effectiveness.

Empower managers to run their own reports and make regular 'little and often' updates rather than relying on annual reviews in order to reduce bottlenecks and improve the quality of ongoing performance management.

9. Support and customer success

Even the best systems require thoughtful implementation and ongoing support. Performance management software can be complex, not just technically, but culturally.

That's why having a knowledgeable **Customer Success Manager (CSM)** is invaluable. A good CSM understands both the software and the human side of performance management, guiding your organisation through adoption, configuration, and best-practice use.

10. Al capability

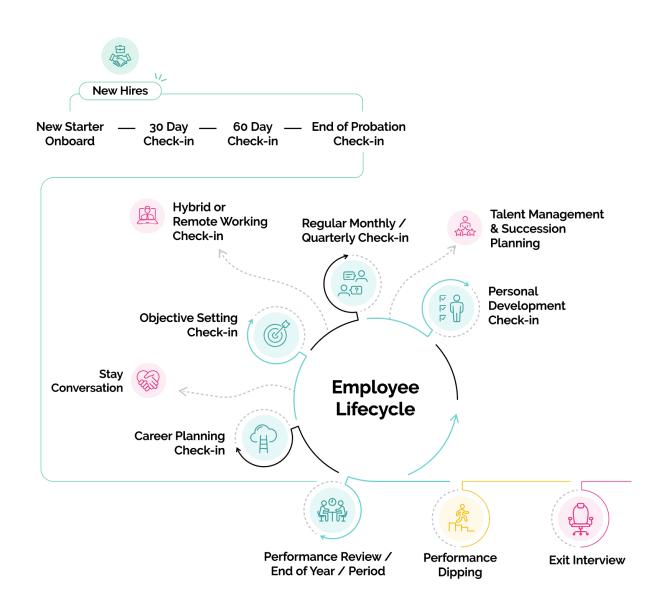
Lots of tools say they're **AI-powered**. Some are, some are using automation to achieve some of the same goals as AI. If the software is using AI, look into how it's been developed, tested and what's in the product roadmap for future development. AI has the potential to bring huge efficiencies, greater fairness and more consistency to performance management if the application has been developed and tested to rigorous standards.





Supporting the whole employee lifecycle

The ideal performance management system is one that supports the whole employee lifecycle from onboarding onwards.





The benefits of using performance management software

Performance management software is fundamental to setting your people and your business up for success. It's about more than upgrading your forms and templates or automation and compliance. Performance management software elevates manager capability, encourages better conversations and enables more of your people to achieve their potential. Here are some of the many benefits of using a leading-edge performance management system:

- Enhance manager capability: By prompting managers to engage in best practices such as giving regular feedback and recognising achievements, a performance management system develops managerial skills and drives consistent, high-quality people management.
- Shape organisational culture: A good performance management platform shifts the focus from a top-down assessment to a model where employees and managers collaborate as joint stakeholders in achieving organisational and personal goals. This approach fosters greater engagement, productivity, and shared ownership of success.
- Support employee growth: A leading performance management system will help employees overcome previously unspoken issues that are holding them back, clarify expectations, and demonstrate a clear career trajectory within the organisation. A comprehensive development plan affirms to employees that their employer is bought into their success.
- Provide Strategic HR insights: By consolidating performance data, performance management software offers HR teams insights that can drive strategic decisions, aid workforce planning, and guide initiatives that impact organisational performance.



Benefits in action

The benefits above all sound good in theory, but what do they actually look like when you apply them to performance management in real life? Here are a few examples.

Accelerating onboarding and probation success: A structured 'first 90 days' programme incorporating week one check-ins, month one objective-setting, month two check-ins, and a month three probation review will help new starters feel like they belong. It can reduce the time it takes for new hires to reach full productivity by up to 50% and improve probation outcomes.

Improving graduate and early-career retention: If insights from your performance management system reveal participants in your graduate training programme are leaving within one or years due to insufficient training and development, HR can put in place targeted interventions to improve retention and maximise the value of the programme.

Strengthening leadership pipelines: Identifying departments with gaps in highly rated leadership capabilities enables HR to take a more proactive approach to talent development, preventing potential continuity issues, and matching people to their next role at the right moment.

Enhancing employee engagement and employer reputation: Personalised, fit-for-purpose performance management solutions can positively influence employee engagement scores, eNPS results, and external reputation metrics such as Glassdoor ratings.



How to build a business case for performance management software

Any performance management system should positively impact an organisation in a variety of ways. Exactly calculating a return on investment is tricky, as there are so many factors involved, but it is possible to track trends and establish a ballpark figure. Effective HR teams should be able to inform the senior leadership team of performance management ROI to demonstrate the value of it to the organisation.

From our experience of working with hundreds of clients over the past decade, we understand what the benefits are of having a relevant and tailored performance management process on a dedicated platform.

We have deduced when using Appraisd to provide one-to-ones, performance reviews, feedback-giving and objectives-tracking, performance managers can expect the following improvements:

- More timely and relevant feedback is given to employees, increasing their engagement and helping to improve their performance and productivity as they understand their strengths and where to focus their efforts. As feedback becomes embedded in the performance management culture of the business, the value of the work employees produce increases every year.
- Employees attain a greater sense of purpose through more frequent one-to-ones or checkins with their manager and greater clarity on their objectives. They feel more valued, more in control of their own development and are less likely to leave the company.
- Managers build up a stronger relationship with their direct reports, getting to know them
 better and understand what motivates them and what their ambitions are. Through this
 process they can more easily spot those who are likely to leave the company and, in some
 cases, avoid this happening and reduce the costs around employee turnover.



By introducing a performance management process that is consistent across the organisation, with everyone following the same framework, it helps to increase inclusion and promote diversity within the business. Measuring employees against SMART objectives, reduces subjective assessments and enables more meritocratic promotions within the company.

Employees who are measured against relevant objectives are more likely to be motivated and engaged with the organisation. This can help to increase the reputation of the employer brand (for example through more positive Glassdoor reviews) which can make it easier to attract the most talented candidates for new positions and fill those vacancies more quickly.

With a clear overview of performance across the organisation, it can help senior managers to create succession plans. This means the business is less exposed if key employees leave the organisation as likely successors have already been identified within the business.

Time and money savings from moving performance management online

For organisations moving from paper-based processes to online performance management systems like Appraisd, we estimate reviews will be at least 25% quicker, with far less time needed to prepare for them and follow them up. For an organisation with 500 employees, who have reviews twice a year, this could save upwards of 1,000 hours. This is already a huge saving that can be included in any performance management ROI calculations.

What are the costs?

The costs of implementing a new performance management system are:

- The licence fees
- The cost of time spent by employees conducting 1:1s, setting objectives, giving feedback and other performance activities.
- The cost of the time spent by the performance manager and the rest of the HR team in implementing it against the cost of managing the old paper-based or legacy online system.



What does a good performance management process look like?

A truly effective performance management process is more than just an annual review; it's a continuous, transparent, and adaptive system that supports both business outcomes and individual growth. Below are key characteristics to aim for:



1. Goal alignment and clarity

Goals should be **SMART** (Specific, Measurable, Achievable, Relevant, Time-bound) and set collaboratively between managers and employees.

Each person's objectives should map back to broader organisational priorities, so everyone is pulling in the same direction.

Goals should not be static; they may evolve in response to changing business needs or external factors.

2. Frequent check-ins and conversations

Rather than relying solely on an annual review, a great process includes regular checkins (weekly, monthly, quarterly) to track progress, adjust course, and address challenges early.

These check-ins should be informal and supportive, allowing open dialogue and problem solving, not just formal evaluation.

Managers should use check-ins to remove obstacles, offer guidance, and stay attuned to how their team is coping.



3. Continuous feedback

Employees benefit most when feedback is timely and specific rather than delayed until review time.

Feedback should occur both upwards and sideways including peer feedback, manager feedback, even self-reflection.

Recognition of good performance should be woven into daily routines, not limited to the review cycle.

4. Development and growth focus

Performance conversations should not just assess what was done but explore how the employee can grow by identifying skills gaps, training, stretch assignments, or mentoring.

Career development should be visible: employees should see how they can progress or evolve within the organisation.

Development plans should be revisited and updated regularly, not 'set and forget.'

5. Transparency and fairness

The process should feel fair with clear criteria, consistency across teams, and open communication around expectations.

Ratings or assessments should be explained, not opaque.

Wherever possible, objective data and examples should support evaluations (rather than just subjective impressions).

6. Accountability and ownership

Employees should be empowered to take ownership of their own progress; to self-reflect, propose goals, request feedback, flag challenges.

Managers are accountable for coaching, supporting, and removing barriers, not just judging performance.

HR or operations teams should ensure the process is followed, provide oversight, and help maintain quality.



7. Iterative and adaptive

A great performance management process evolves as you learn from each cycle and adjust.

Soliciting feedback from participants (employees, managers) is vital: what's working? What's cumbersome?

Use short iterations to tweak things (templates, frequency, conversation guides), rather than waiting for an end of year overhaul.

8. Insights and analytics

A strong process is supported by data including tracking trends in goal completion, feedback frequency, development actions and rating distributions.

These insights help leadership see where support is needed, detect bias, identify high performers and at-risk talent, and better allocate resources.

Dashboards and summary reporting (with confidentiality maintained) can help guide decision making and continuous improvement.

9. Leadership buy-in

Senior leaders must actively participate by setting goals, having visible development conversations, and engaging in feedback themselves.

Their behaviour signals that performance management is not a box to tick but a core part of organisational culture.

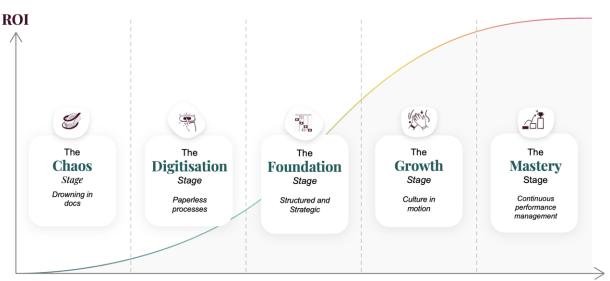
Leadership endorsement gives credibility and helps drive consistent adoption.



The journey towards continuous performance management

At some point, almost every organisation has been at the 'drowning in documents' stage. But over time, it becomes clear that a better solution exists. Once performance management is digitalised, the business can take the first steps towards continuous performance management.

Maturity Curve: Your journey to continuous performance management Identify where you are today | Choose your next step | We'll help you scale at your pace



Level of maturity



Where does your organisation sit?



The Chaos Stage

Drowning in docs



The Digitisation Stage

Paperless processes



The Foundation Stage

Structured and Strategic



The **Growth** Stage

Culture in motion



The **Mastery** Stage

Continuous performance management

It's very analogue – Word and Excel.

There is a lot of emailing.

HR admin is a nightmare at review time.

Our Board reporting is embarrassingly basic as we can't get the data.

We have no visibility on which managers are actually doing PM.

We know there must be a better way! We've gone online -hooray.

Starting small and managing the change at a pace people can handle.

HR has less email chaos and record keeping is strong.

Annual reviews and mid-year reviews happen consistently.

We have an interesting story to tell the Board about completion rates, progress against objectives and career ambitions of our employees.

We know we need to do more but we're worried about push back if we move too quickly. We're adopting additional elements into our process like regular 1:1s.

We have different forms and templates for a variety of conversations. We're training our managers so they can take more ownership of the process.

We're running 360 feedback to get a rounder view of our employees.

Our Board find what we have to say about our workforce is insightful and helps plan for the future.

We're connecting employee objectives with team and company goals.

We're incorporating new elements into our process like employee recognition and instant feedback.

Employees
understand how
their work
contributes to
the overall
company goals
and their role in
their own
development.

Performance management feels relevant to every employee thanks to our tailored processes.

Automation is helping us to run a comprehensive process for every employee group.
We're using the 9-box to map talent and progression which feeds into workforce planning.

Managers and employees are completely comfortable having performance conversations.

Development, careers and recognition are part of a constant conversation between managers and team members.

There are no peaks and troughs in activity for HR or anyone else.

Performance issues, grievances and PIPs are at a minimum as they're addressed early before they escalate.

Annual reviews are a space for reflection and forward planning, not a dreaded event.

We guide our Board on workforce planning with the data we have on talent in the business.

HR has complete oversight into the performance of every team and employee. Our retention, productivity and employee engagement are better as a result of our performance management process.



Questions to ask any performance management supplier

If you're ready to attend some demos, here is a selection of questions you can select and put to potential vendors to gauge their suitability for your business.



- ✓ How does your system ensure performance reviews and check-ins are completed on time and at high completion rates (e.g. >95%)?
- ✓ Can managers and employees easily document conversations, and how is compliance with local legislation ensured?
- ✓ Does your system provide analytics on ratings and performance trends across teams or departments?
- ✓ What goal-setting frameworks (e.g., OKRs, SMART goals) does your system support?
- ✓ How does the platform ensure that objectives remain relevant and regularly updated throughout the year?
- ✓ What reports are available for HR and managers to assess goal progress and completion?
- ✓ How does your platform enable real-time feedback and recognition?
- ✓ Can employees and managers give and receive feedback from anywhere (e.g., via mobile, integrations with Teams/Slack)?



- ✓ Does the system support 360° feedback, and can it be tailored to fit our organisational culture?
- ✓ How does your system help employees create and maintain personal development plans?
- ✓ Does your system include a nine-box grid or similar tool for assessing performance and potential?
- ✓ How does it help us identify critical roles and potential successors?
- ✓ Can we visualise talent pipelines or succession risks within the system?
- ✓ What types of reports are included as standard, and how easy is it to create custom reports?
- ✓ Is there an API available for exporting data into our existing BI tools (e.g., Power BI, Tableau)?
- ✓ Which HR systems and platforms does your software integrate with out of the box?
- ✓ What automation and AI features does the software have?
- ✓ Can we define custom rules for forms, processes, or approval workflows based on department, level, or role?
- ✓ What visibility do managers have into their team's performance and development status?
- ✓ Can managers of managers view broader team or departmental insights
- ✓ Can managers run their own reports without HR involvement?
- ✓ How does your system support frequent, lightweight updates rather than just annual reviews?
- ✓ What type of onboarding and ongoing customer support do you provide?
- ✓ Will we have a dedicated Customer Success Manager, and what does their role include?
- ✓ How do you support cultural adoption and best practice, not just technical setup?
- ✓ Can you provide examples of how you've helped other organisations successfully embed performance management processes?



Implementing performance management software in your business

What a successful implementation looks like

Having a clearly defined implementation process helps ensure maximum adoption and minimal headaches. Here's an overview of what a typical implementation looks like.

1. Discuss requirements and goals

First, you'll identify your organisation's goals. Your chosen supplier will be able to help you with this. This includes understanding your current performance culture, the changes you'd like to make, how engaged managers are with current performance processes, and what outcomes you aim for (for example, increasing frequency of check-ins, improving feedback quality, enhancing employee engagement). From this, you can define measurable goals and approaches to achieve them.

2. System setup and integration

In this phase, you configure the new system to match your organisational needs. This often involves setting up any desired integrations with existing HR or payroll systems, ensuring user authentication setup (like single sign-on), syncing with user databases, and other technical configuration.

3. Internal testing

Before going live, it's good practice to perform testing with a small group to make sure everything works as expected. This includes verifying settings, workflows, permissions, and making sure the system supports your goals. Training and feedback are essential at this stage, so you can refine configurations and correct issues.



4. Configuration sign-off

Once testing is complete, stakeholders review and approve the system setup. Any required changes are incorporated, and there's a final check to ensure everything is ready. Quality assurance can include verifying that configurations align with initial goals and that all integration points are working properly.

5. Internal communications

Communication is key. Build a communication plan to engage employees and managers. Identify how the new performance process fits with other organisational initiatives, what benefits it will bring, and how it will help individuals. Use compelling messaging to generate buy-in and excitement. Again, your chosen supplier should be able to help you with a suggested schedule and what to include.

6. Employee onboarding

Next, start onboarding the users. Train administrators so they are comfortable managing the system. Provide training materials and sessions for employees and managers. Make sure support is available so users can ask questions and get help during this transition.

7. Launch

When everything is ready, you launch the system organisation-wide. This might be done all at once or in stages (for example, by department or cohort). Ensure that onboarding is complete, that users have access, and that initial communications are sent out (like welcome messages, login instructions, etc.).

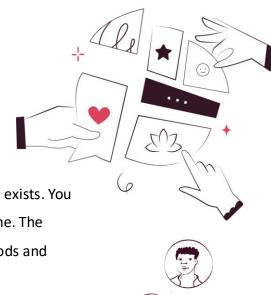
8. Review and refine

After launch, you gather feedback and assess whether things are going as planned. Monitor key metrics to see if goals are being met, collect suggestions from users, and adjust workflows, communications, or training as needed. Continuous improvement ensures long-term success.



Top tips to guide your implementation process

- ✓ Don't wait for the 'perfect moment' to launch it rarely exists. You can introduce your new performance process at any time. The worst option is sticking with outdated, inefficient methods and clunky documents.
- ✓ When you launch, start simple. Give employees a clear, manageable first step such as setting goals or completing a midyear review.
- ✓ Keep the momentum going by iterating quickly. Encourage hesitant managers and senior leaders to focus on progress over perfection. It's better to get something up and running, then refine it based on real feedback from employees and managers. Embrace an agile, iterative approach rather than a one-and-done rollout.
- ✓ Use the support available to you whether from your internal project team, consultants, or external partners — to guide you through setup and best practices.
- ✓ Make the rollout as smooth as possible by preparing clear communication materials in advance. Use pre-written launch emails, quick-start guides, or 'train-the-trainer' resources to give everyone a concise overview of the new system and how it benefits them.









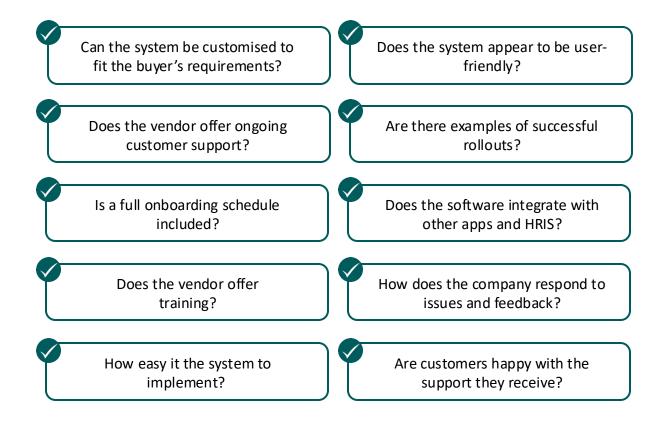


Your performance management software checklist

Customer reviews and case studies

While looking through reviews and case studies, remember some of your high priority questions or requirements from each vendor. You'll soon get an idea of which vendors could be a good fit.

Often the answers to questions you might already be pondering can be found within these reviews, such as:



You can view Appraisd's testimonials and case studies here

Finally, to help you narrow down the choices, use our performance management software checklists on the following pages to make sure the systems on your shortlist will live up to your requirements.



Your performance management software checklist

	1. ∌Appraisd by § Talos 360	2.	3.
Performance reviews	✓		
Regular check-ins	✓		
Onboarding ad probation reviews	✓		
Objectives, OKRs and goal setting	✓		
Progress tracking	~		
Ratings and calibration	✓		
Automated review cycles	~		
360 structured feedback	~		
Continuous instant feedback	~		
Recognition and shout-outs	~		
Development plans	~		
Talent planning tools	~		
Reporting and analytics	~		
Single Sign-on (SSO), MS Teams and Outlook apps	~		
Al capability	√		
Custom templates and workflows	√		
Full customisation on logos, colours, and wording	~		
Full onboarding programme	~		
Dedicated customer success manager	✓		



HRIS integrations checklist

	1. ∌Appraisd by	2.	3.
AlexisHR	√		
AzureAD	√		
BambooHR	√		
CatalystOne	✓		
Ceridian Dayforce	√		
CharlieHR	√		
Freshteam	√		
Hibob	✓		
Humaans	√		
IRIS Cascade HR	√		
Justworks	√		
Lucca	√		
Okta	√		
Paychex	√		
Paylocity	√		
Paylocity	√		
PeopleHR	✓		
Personio	√		
Sage HR	√		
SAP Succe\ssFactors	√		
Sapling	√		
TriNet	√		
UKG Pro	√		
Workday	√		
Zoho People	✓		



About Appraisd



We've been initiating valuable, purposeful performance conversations since 2012. Appraisd is the creation of Roly Walter who combined his experience as an HR Business Analyst with his interest in technology to build a platform that employees would find genuinely useful, HR would be proud of, and managers would find a refreshing change from out-dated appraisal forms.

Appraisd is a performance management platform for organisations with 50 to 5,000+ employees in any sector, anywhere in the world. Appraisd is configured to fit your business and your process and frees up the HR team from chasing and cajoling reluctant managers.

Right from the beginning, we've seen our customers as partners. We're not interested in short-term gains; we want to provide employers something that is useful now and remains so in the years to come. We are here to work alongside our customers, helping and advising them how to keep their approach relevant and fresh.

Appraisd has hundreds of configuration options that mean it works the way you want it to with no compromises on process or user experience. If you're not sure where to start, your dedicated, experienced, Customer Success Manager is on-hand to offer advice and guidance from onboarding onwards.

If you'd like any help reviewing your current performance management process or would like to see any of the features of Appraisd, please get in touch - we love answering your questions about performance management.



Want to find out more?

Book a demo of Appraisd to see the system in action.



+44 (0)20 7202 7979

Appraisd.com

