

## Getting Performance Management Right with Bullet Points, Not Books

September 25<sup>th</sup>, 2018



## Some of the critical issues we will be exploring today

- Aligning performance management processes with the business mission
- Taking a fast and actionable look at individual performance, progress, and potential
- Why more frequent feedback works, as well as challenges and lessons learned
- What's next in the performance management evolution



## Earn Credits

- Stay online for the entire webcast
- Credit available for participation in the live webcast only

### HRCI

- ✓ Type your full name, email address, and specify “HRCI” in the space provided

### SHRM

- ✓ Type your full name, email address, and specify “SHRM” in the space provided

### CPE (NASBA)

- ✓ Type your full name, email address, and specify “CPE” in the space provided
- ✓ Click ‘ok’ for 3 popups that occur during the program



## Today's Hosts



Amanda Popiela  
Researcher  
***The Conference  
Board***



Anna Burke  
Vice President  
of Marketing  
***HighGround***



# Today's Presenters



**Jill Miller**  
SVP, U.S. Director,  
Human Resources  
***Hill+Knowlton  
Strategies***



**Laura Romanenko**  
SVP, U.S. Director,  
Talent Acquisition  
***Hill+Knowlton  
Strategies***



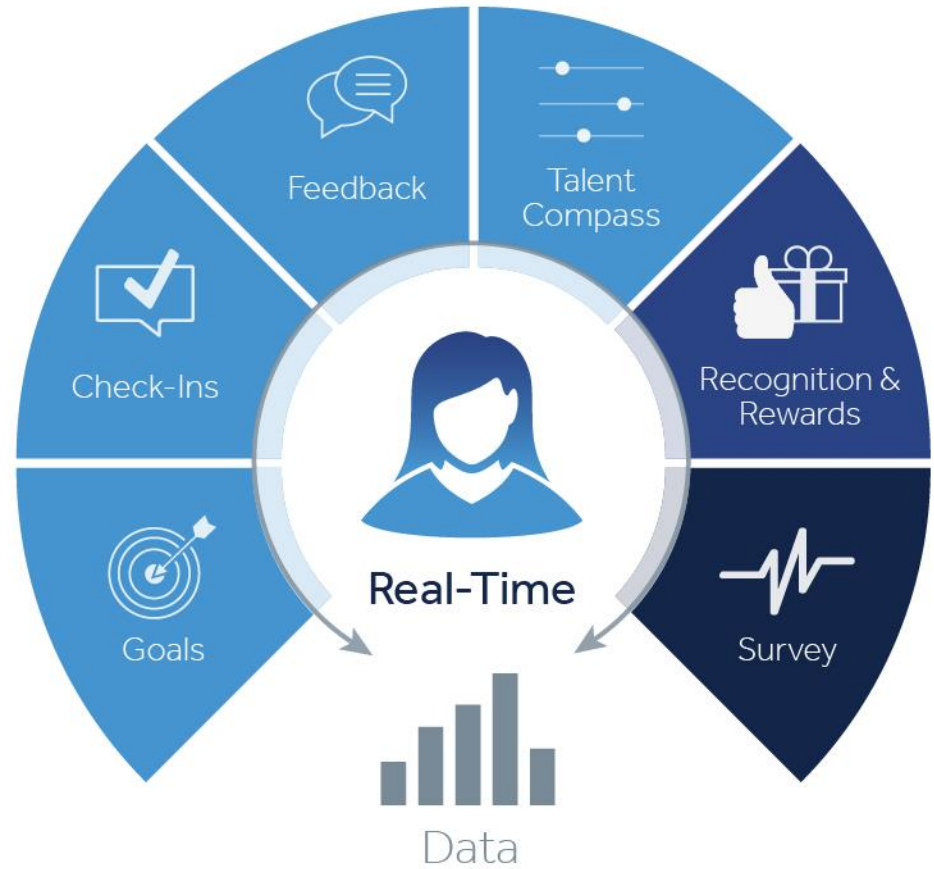
**Rebecca Ballard**  
Head of  
Communication and  
Culture  
***Hill+Knowlton  
Strategies***





# HighGround

HighGround gives employees an easy way to harness real-time feedback from their networks in order to collectively thrive.



# Getting Performance Management Right with Bullets, Not Books

A look at how Hill+Knowlton Strategies moved away from the annual review to continuous feedback



# Agenda

**Providing the frame**

**A new focus**

**Introducing Snapshot**

**Current lens**

**On the horizon**





# Providing the Frame

# Industry and Company Context

## Professional services consulting

- Public relations and integrated communications
- Ongoing strategic relationships mixed with long-term, short-term and crisis projects
- Greatest asset is people

## Young and transient PR industry

- Employee profile largely entry to mid-level
- Industry standard annual turnover is 25-30%

## Performance management evolution

- Several platform approaches in recent years
- Employee surveys seeking change



# A New Focus

# A Business-Driven Transformation

## Changes to business model...

- Focus flexibility and velocity
- Move to single P&L
- Shifted client-centric reporting lines for talent
- Flatter, more performance-focused structure

## Along with evolving employee needs...

- Newer generations asking for more feedback, more often

## Build a case for a different style of performance management.

- Bullets, not books
- Limited participants, limited time
- Individual performance, progress, potential
- Quick, simple, actionable



# Introducing Snapshot

# Quarterly Snapshots

A fast and actionable look at individual performance, progress and potential

## WHAT

A quarterly check-in between employee and manager about current and future performance

## WHEN

About 30 minutes, once per quarter

## HOW

Through a Snapshot tool followed by a dedicated meeting between employee and manager, to receive and provide simple, steady and actionable feedback on last three months

## WHY

Quickly calibrate employee's personal performance, learning and direction throughout the year with input from client leaders

## WHO

All employees who were hired before the performance window opened



# Key Players

## Employee/Reviewee

- Completes self-evaluation
- Suggests client leaders to provide additional feedback

## Client Leader(s)

- Works with employee but is not the primary manager
- Provides feedback on employee's work they oversee

## Manager

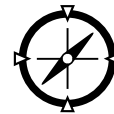
- Completes the review and meets with the employee
- Access to self-evaluation and feedback from client leader

# Snapshot Content



## Highlight Reel

- Discuss biggest responsibilities, achievements and accomplishments over the past three months



## What Next

- Address one of more areas/skills to try out or focus on before the next Snapshot

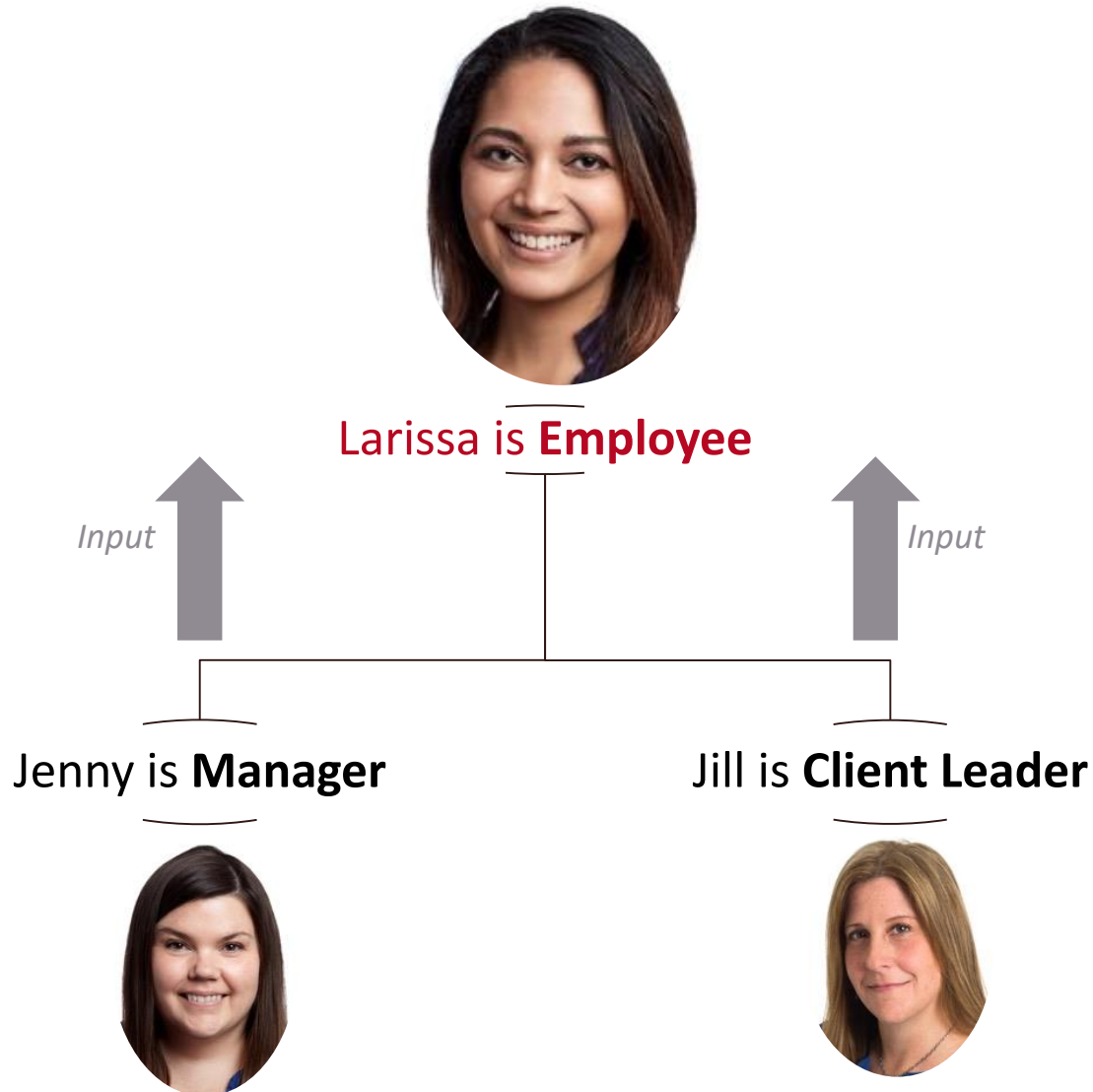


## What Else

- Highlight training or office leadership activities
- Share any additional topics to discuss



# Employee lens





# Self Evaluation

2018 Q3 Snapshot Save and Exit

1 Highlight reel 2 What next 3 What else


Think: clients and beyond. Bullets, not a book.

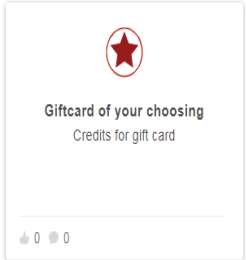
(Note: To view your previous Snapshot, go to Snapshot > Completed > Filter for About Me > Click in > Click through or Download & Print.

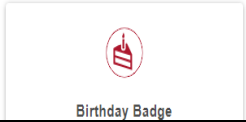
The sidebar at right pulls in any Cheers! recognitions received during this period. Looking ahead, you can give others some helpful notes for the next Snapshot period by giving out more badges for a job well done.)

**Highlight reel \***

Most significant responsibilities, achievements and accomplishments since last Snapshot / in the last three months.

 Larissa Coley

  
Giftcard of your choosing  
Credits for gift card

  
Birthday Badge


2018 Q3 Snapshot Save and Exit

1 Highlight reel 2 What next 3 What else

Think: clients and beyond. Bullets, not a book.

**What next \***

One or more areas/skills to try out or focus on before the next Snapshot.

 Larissa Coley

This is an opportunity to focus on projects the employee would like to work on in the future.

**Cheers!** Request from H+K Strategies | Blanc & Otus Back Save and Continue

2018 Q3 Snapshot Save and Exit


1 Highlight reel 2 What next 3 What else

Think: clients and beyond. Bullets, not a book.

(Note: For example, this is a great place to showcase the trainings you have taken or plan to take as part of your commitment to FY40. You can also highlight your office involvement and leadership - I.e. Training Liaison, Fellow Coordinator, Mentor, Distinction, etc.)

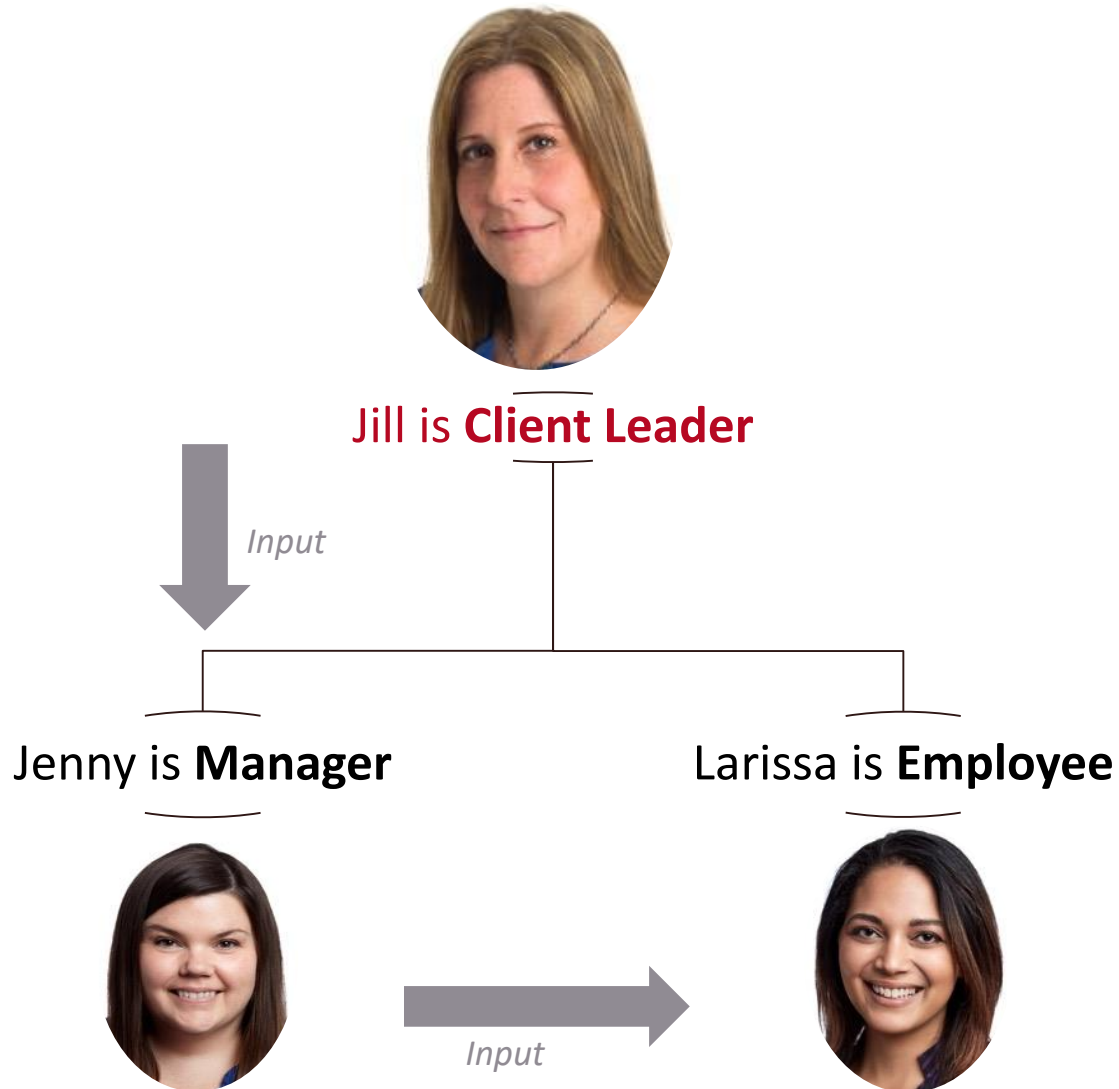
**What else \***

Anything else to share?

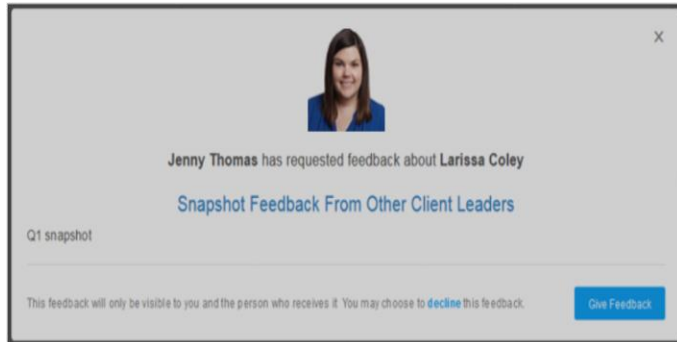
 Larissa Coley

**Cheers!** Request from H+K Strategies | Blanc & Otus Back Submit

# Client Leader lens



# Client Leader Feedback



Positioning  
Statement



### Snapshot Feedback From Other Client Leaders Save and Exit

q1

**Highlight reel \***

One or more of the reviewee's most significant responsibilities, achievements and accomplishments since the last Snapshot / the last three months.

**What next \***

One or more areas/skills I want to see the reviewee try out or focus on growing in before the next Snapshot.

**What else \***


Here are other things I want to share.

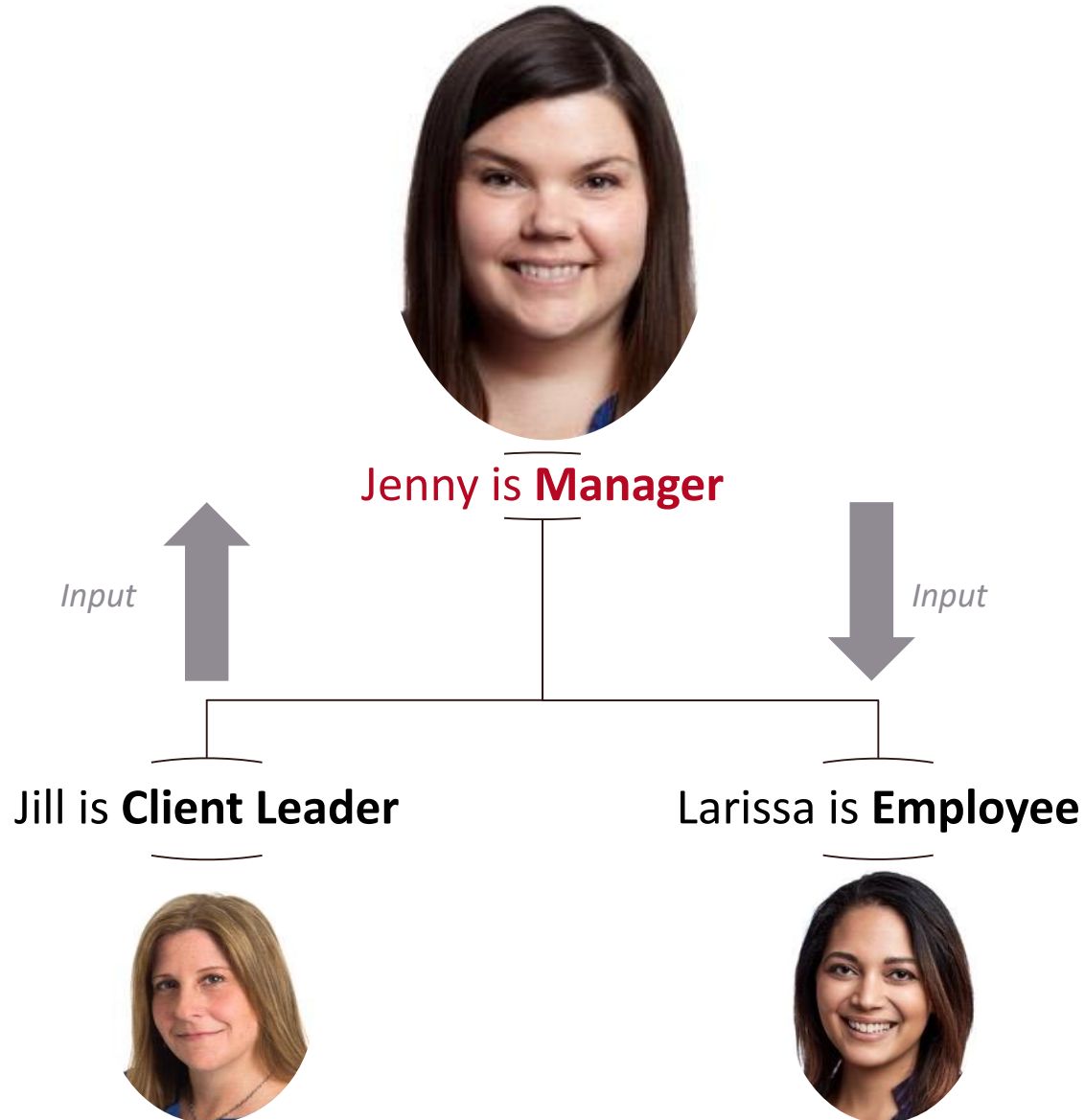
**Select \***

Sum up the subject's contributions to your team. (Note: we expect most people to align with the middle statements).

- This person's strengths are not a fit with H+K.
- This person isn't the right fit for this team, but may have strengths that might be deployed well on another team or in another role at H+K.
- This person is already a solid team member, and could make even greater contributions with some focus on the training and growth areas outlined above.
- This person is an excellent team member and contributor just as they are, and they should keep up the great work.
- This person is exceptional, top of the class, above the rest, for their level, for this firm.

 Requested by **Jill Miller** about **Laura Romanenko** Send

# Manager lens



# Manager Feedback

### Snapshot Feedback From Other Client Leaders

The Snapshot process allows our team to quickly calibrate their personal performance, learning and direction throughout the year with input from their client leaders (whether those clients are internal, external, or both).


Please use this form to request feedback on behalf of your direct report from up to 2 client leaders of the direct report's choosing.

As a manager, you should not only approve of this list, but edit or alter as you see fit, by including others who you think can provide valuable feedback or not including those who you feel won't provide valuable feedback. That feedback will be visible to you in Snapshot as the subject's manager (the subject will not see it directly), and you'll be able to incorporate it into your Snapshot review.


**Visibility settings**

- This feedback will only be visible to you and the person who receives it
- Subject will not have visibility to this feedback

Who is the subject of this Snapshot feedback?

 Larissa Coley

Which other client leaders (up to 2) would the subject like Snapshot input from?

 Jill Miller

What would you like feedback on?

[Send](#)

Manager's  
Comments



## Recognition Badges



### 2018 Q1 Snapshot

[Save and Exit](#)

- Highlight reel
- What next
- What else
- Positioning Statement


Think: clients and beyond. Bullets, not a book.

(Note: To view your previous Snapshot, go to Snapshot > Completed > Filter for About Me > Click in > Click through or Download & Print.

The sidebar at right pulls in any Cheers! recognitions received during this period. Looking ahead, you can give yourself some helpful notes for the next Snapshot period by giving out more badges for a job well done, which you'll be reminded of on this screen next time!


#### Highlight reel

Most significant responsibilities, achievements and accomplishments since last Snapshot / in the last three months.

 Larissa Coley

Test


[Add Note](#)



#### Day of Awesomeness

Like Chuck Norris, you amaze me with your rep...

1 0



#### MVP

Thank you for doing such an outstanding job w...

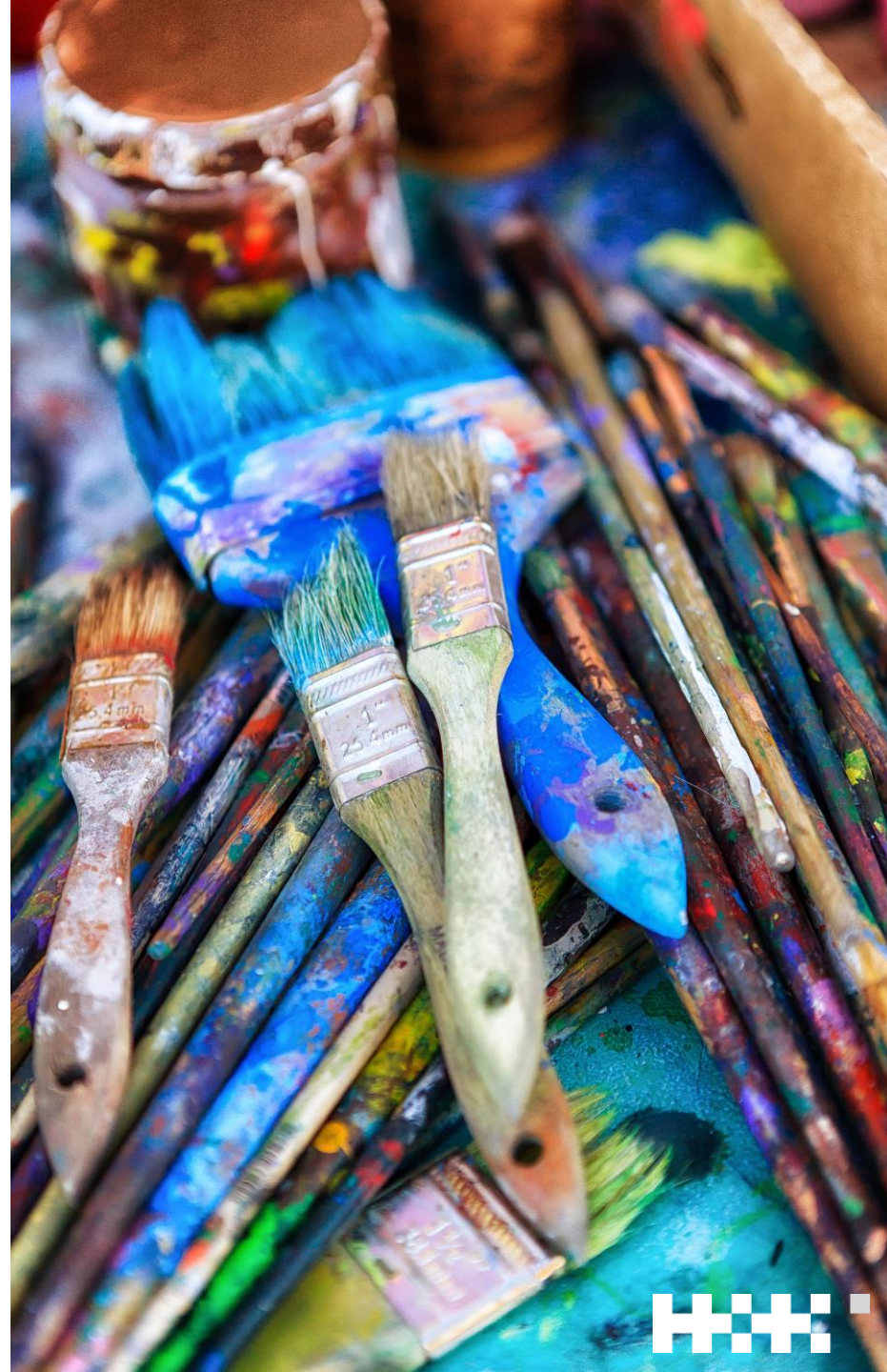
# Tools and Resources

**Communication Plan + Cadence**

**Timeline**

**Employee + Manager Guides**

**Sample Review**



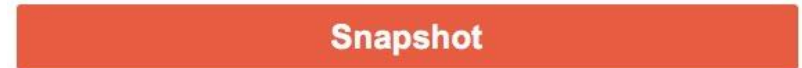
# Sample Communications



## Snapshot Countdown

**32 Days To Go**

Our quarterly review, Snapshot, has officially opened. Everyone will be reviewing their work and contributions for the time frame of **July 1-September 30** in Cheers. All employees who are at the Director level and below (excluding current



Q3 Snapshot is almost here! The review period will run from **Monday, Sept. 17 to Friday, Oct. 19**. Please be on the lookout for more information regarding Snapshot and important dates in the coming weeks. If there are any questions, please contact your HR representative.



# Sample Timeline





# Employee and Manager Guides

## Snapshot Employee Guide

### How to Get the Most from Your Review

Feedback and coaching are critical for our career development, but traditional performance reviews don't provide this on a consistent basis. Enter: Snapshot. With Snapshot, our contributions can be recognized, we can get specific developmental feedback, and we have set moments to talk about our path ahead, all throughout the year.

Snapshot will help fuel your performance by creating frequent moments to touch base with your manager in a more structured fashion, more often. It will allow you to review priorities regularly, comment on your current work, and collect guidance where needed. You will receive clarity from your most relevant client leaders on expectations and develop better understanding of how to deliver your best work. It will help align you and your manager and client leaders on your performance and progress.

Snapshot is designed to be quick and frequent, so that more time is spent solving future problems and removing roadblocks to success.

#### Useful tips for preparing your Snapshot self-evaluation:

- Consider the following as you are completing your self-evaluation:
  - Could more progress have been made with more effort?
  - To what extent were results obtained?
  - What were your successes?
  - Did business conditions change?
  - Did you deliver on time and on budget?
  - What do you want to focus on next?

## Snapshot Manager Guide

### How to Give Strong Reviews

The best managers are generous with their feedback, guidance and coaching. These are critical for an employee's career development, but traditional performance reviews don't provide this on a consistent basis. Enter: Snapshot. With Snapshot, you can recognize your team members' contributions, motivate them to grow, give specific developmental feedback, and have set moments to talk about their path forward, all throughout the year.

Snapshot will help you fuel performance by creating frequent opportunities to touch base with your employees in a more structured fashion, more often. It will allow you to review priorities regularly, comment on current work, and provide course correction where needed and as soon as possible. Employees will receive clarity from their most relevant client leaders on expectations and develop better understanding of how to deliver their best work. It will help align you, your employees and their other client leaders on performance and progress.

Snapshot is designed to be quick and frequent, so that more time is spent solving future problems and removing roadblocks to success.

#### Useful tips for conducting your one-on-one Snapshot meeting:

- Schedule sufficient time in a private setting. No distractions, no cell phones, no laptops, etc. Do not cancel or reschedule this meeting.
- Begin with strengths, then development areas, and always include specific examples.

# Sample Snapshot

Cheers!

 SPEND 1,000 Credits  
3,725 Points
 

 GIVE 0 Credits  
0 Points
 

 Anton Associate

**Anton Associate**  
Associate  
[Info](#)  
[Download Summary](#)

Goals Feedback Snapshot Perform Feed Recognitions

Highlight Reel (Last 3 months)

**Employee Comment**

- Completed Sysnos training & successfully compiled social metrics report for Target/Black Friday announcement using the system
- Secured national media hit in USA Today including a quote from Target's CEO discussing increase in minimum wage
- Delivered an AP Style writing workshop presentation to the fellows; gained presentation experience

**Manager Comment**  
(Can view Employee Comment)

- Anton is a quick learner and picks up on new systems and platforms with ease; his quick study on Sysnos was essential in turning around a major executive coverage report on a tight deadline; Anton was key to running that project and produced a high quality report
- Anton has exceeded expectations set regarding media relations/coverage on two of his key accounts; on both Target and VMware he has secured national hits key to the overall success of the client program; he also has budding relationships with several key writers and his teams are leaning on him with increased responsibility in media strategy and pitching

**Client Leader Comment**  
(Cannot view Employee Comment; Employee does not see CL verbatim)

- Anton secured top tier coverage on Target's minimum wage announcement; the USA Today hit and CEO interview he secured was integral in meeting the client's coverage expectations; in this case Anton helped the team exceed those expectations

What Next (Next 3 months)

**Employee Comment**

- Take on a speaking role providing media updates on the weekly Target client update call
- Further develop relationship with USA Today reporter by securing a lunch or coffee meeting
- Become more involved in office culture initiatives by joining the Distinction committee

**Manager Comment**  
(Can view Employee Comment)

- Anton desires more client interaction, however he needs to build his confidence in speaking in front of client contacts. We recommend Anton complete the Presentation Skills training. I will also work with Target client lead to give Anton a small speaking role specific to media updates on a call after he completes the training
- Media relations is Anton's sweet spot and support his efforts to continue building his media relationships. We would also like for Anton to forge similar relationships with at least 2 top tier national publications
- We support Anton growing his leadership skills within the office by joining the Distinction team and would like him to lead one Distinction event for the office in the next quarter

**Client Leader Comment**  
(Cannot view Employee Comment; Employee does not see CL verbatim)

- Anton is a little hesitant and timid when it comes to client interaction; I'd like to push him to be more present on client calls and contribute more to highlight his growing media relations expertise and relationships

What Else (Other relevant items)

**Employee Comment**

- I would like to get more involved in the strategic planning of a client campaign and help develop the recommendation of approach and tactics to achieve client objectives

**Manager Comment**  
(Can view Employee Comment)

- Anton is on a strong growth path based on his work to date; we will provide the opportunity for Anton to join the internal brainstorming session for the VMware 2018 PR plan so he can observe, listen and contribute to the planning process as a first step

Cheers!

H&K Strategies | Blanc & Otus

# Current Lens

# Challenges

Performance Review Fatigue

Training on New Platform

Primacy / Recency

Hesitation with Giving/Receiving  
Direct (Critical) Feedback



# Why It Works

A word cloud of terms describing why something works. The words are arranged in a roughly circular pattern, with some words appearing in larger fonts than others. The words include: employee driven, collaborative, positive, actionable, current, intuitive, focused, substantive, straightforward, transparent, fast, smart, bitesized, easy, simple, and core.

employee driven  
collaborative  
positive  
actionable  
current  
intuitive  
focused  
substantive  
straightforward  
transparent  
fast  
smart  
bitesized  
easy  
simple  
core

# Success Metrics

	Annual	Snapshot
Completion rate over 3 cycles <i>skyrocketed</i>	70%	83%
Time to complete <i>shortened</i>	4 Months	1 Month
Administrative time commitment <i>significantly reduced</i>	4x	x



# The reviews are in

“You’ve made snapshot both simple and smart; and in doing so you’ve made it better. Snapshot is a system that zeroes in on the core issues is so much smarter.”

Managing Director

“With Snapshot, we give and receive the upshot. In culinary terms, think of it as focusing on the main course, not the side dishes.”

Managing Director



# On The Horizon



# Snapshot *on* *Snapshot*



## Highlight Reel

- Executive leadership and support
- Develop a communication plan and set a regular cadence
- Use your internal language
- Beta test everything



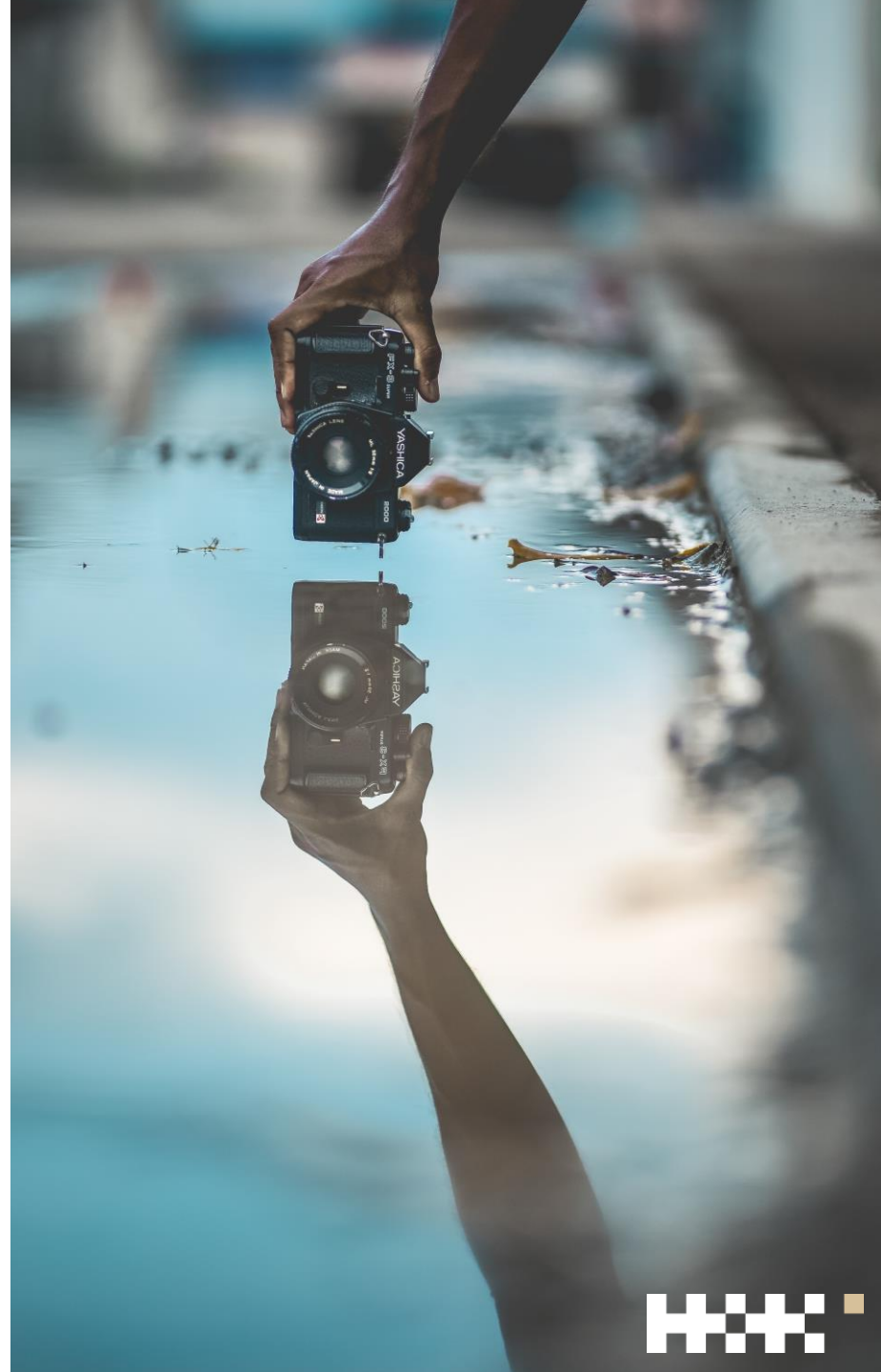
## What Next

- Make it a 360
- EOY annual review
- Goal-setting



## What Else

- Go global



# DISCUSSION



# A Case Study



WINTER IS COMING



# CHEERS GOES GAME OF THRONES



Great work on the rewrite. The difference between the drafts was quite stark. Cheers.



The night is dark and full of terrors. Especially for these 12 badges that are now languishing in the dungeon ... the least-used on the Cheers platform. On Friday we'll learn which handful of badges will be gone forever. You have less than 48 hours to try and save them. If your favorite is below, start giving it to everyone you know.



6<sup>th</sup>  
Sense



Blender



Braveheart



Cash  
Cow



Client  
Whisperer



Digitalent



Opportunity  
Spotted



Socialite



The  
Calculator



The  
Closer



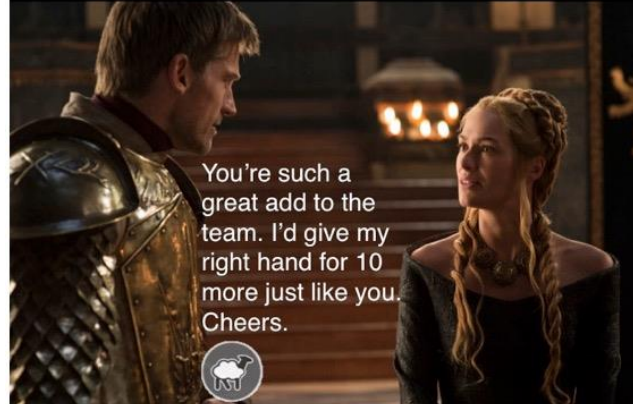
The  
Net



Writer  
Extraordinaire

NEED A REFRESHER ON THE RULES?

# CHEERS GOES GAME OF THRONES



You're such a great add to the team. I'd give my right hand for 10 more just like you. Cheers.



It appears you understand urgency. We return from the weekend to our final days, where we've seen significant increases in Cheers activity on the go. More than 40 percent of all badges given this year via the Cheers mobile app were given in the past 12 days, and there were four times as many badges given via mobile in September as in August. Make every moment count – the countdown to Friday is on.

## REMINDER: GET CHEERS ON THE GO

1. Download the Highground app from your smartphone ([iPhone](#) or [Android](#))
2. Enter your username in this format ([firstname.lastname@corplogin.com](#))
3. Choose "Send me a code," which will arrive by email
4. Enter the 6-digit code on your mobile device
5. Start using Cheers on the go and be entered to win 1,000 points

## THANK YOU FOR YOUR SUPPORT OF CHEERS GOES GAME OF THRONES

### LOOK OUT FOR YOUR LIMITED EDITION BADGE.

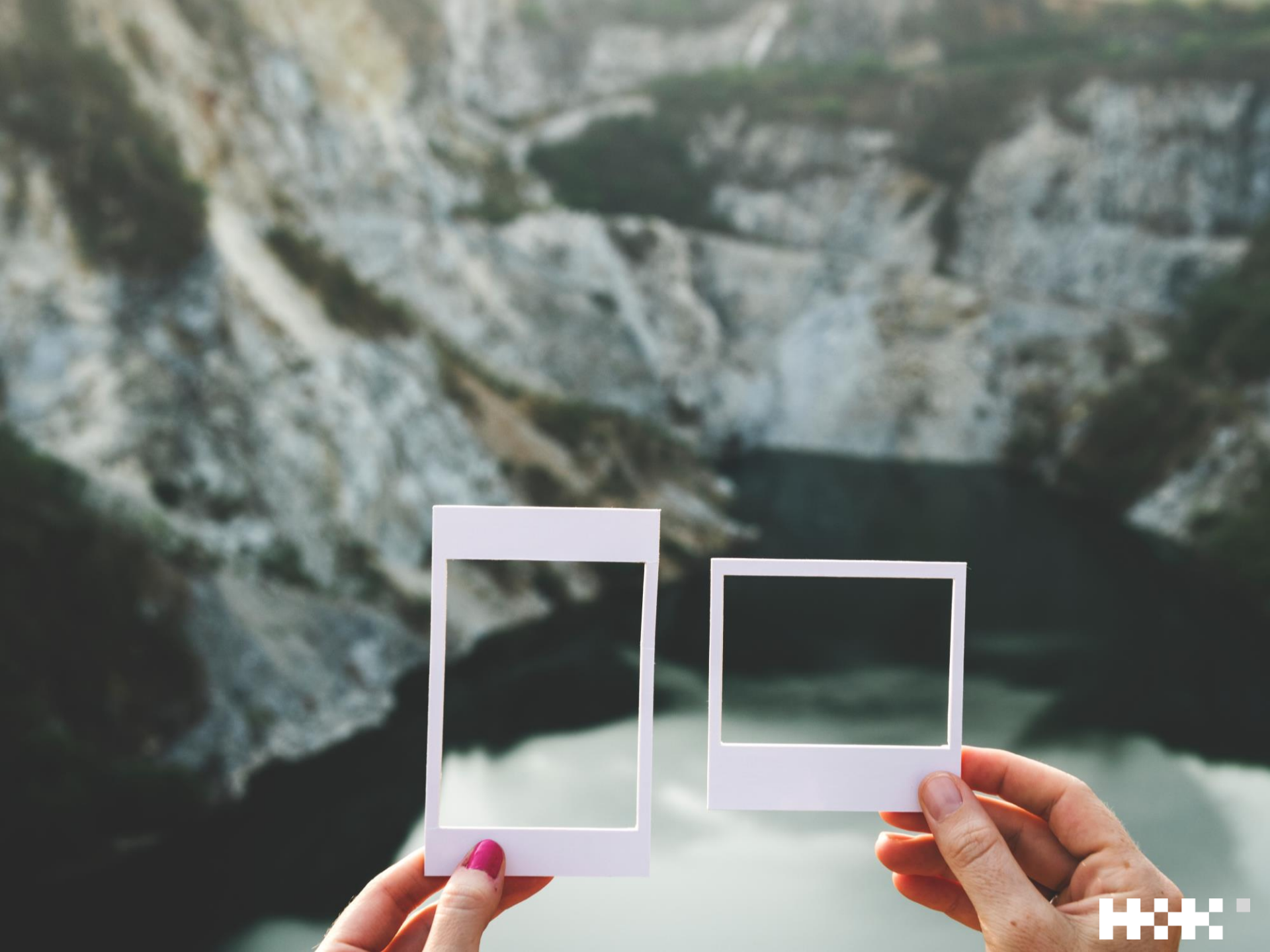
As promised, everyone who gave a badge during the Cheers Goes Game of Thrones campaign will be receiving this special Iron Throne badge – sure to be the envy of all in the Seven Kingdoms.



### CHEERS TO OUR CHEERS ON THE GO WINNER.

Everyone who performed activity on the Cheers mobile app during our Cheers Goes Game of Thrones campaign was entered to win 1,000 Cheers points from the master of coin. Congratulations to our lucky winner, [Jessica Buckholtz!](#)





Use code **KN1** for a **\$500** discount on  
upcoming conferences

- **2018 Employee Engagement & Experience Summit**  
October 18 - 19, 2018 (Las Vegas, NV)
- **2018 Performance Management Conference**  
November 13 - 14, 2018 (New York, NY)
- **19th Annual Talent Management Conference**  
March 05 - 06, 2019 (New York, NY)

To learn more about or register for any of these conferences,  
visit our website at [www.conferenceboard.org/events](http://www.conferenceboard.org/events)

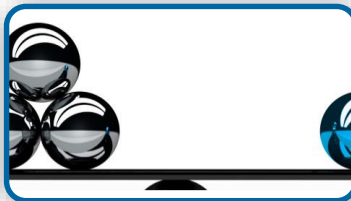


# Other Related Resources from TCB



## Publications

[Global Leadership Forecast 2018: 25 Research Insights to Fuel Your People Strategy](#)



[25 Truths about Performance Management: Insights from The Performance Management Conference](#)



## Webcast

[Workforce for the Future: The Intersection of Human and Machine](#)  
October 2, 2018



## Conference

[5th Annual Talent Acquisition Conference](#)  
October 2-3, 2018

