

# Achieve your Organisation's Objectives through Employee Performance Management

*"The system is really working well...it really has the potential for rapid ROI and a significant reduction in labor costs."*

– Head of Group Business Systems Development  
U.K. Property Manager

## OnBase Solutions for HR - Performance and Promotion Management

Achieve your organisation's corporate objectives through setting and monitoring of SMART personal performance targets and the development of staff to be your future leaders.

### The Basics

The objectives of an organisation are met through the coordinated actions of many people working with individual targets, but to a common purpose. Many organisations set their goals for the year ahead, and arrive at the objectives for individual employees by cascade through divisional and departmental managers. At least once a year, each employee is assessed as to how well his or her objectives have been achieved, and a rating may be given which informs remuneration and promotion decisions. However, employees' objectives are not restricted to those required to reach annual corporate targets. There is a broader agenda, and targets for personal development may also be set to:

- Meet training needs identified in performance appraisals. These training objectives directly affect corporate performance, as improved behaviours and increased capability produce greater productivity and employee engagement.
- Develop staff for promotion. Succession plans for key people are essential, and assessment of individual potential and identification of future business leaders requires the judgement of managers and HR Business Partners.

### The Challenges

To be most effective, all targets need to be SMART (Specific, Measurable, Actionable, Realistic and Timed). It is not sufficient to set objectives once a year, forget about them and then hold an annual appraisal. To be most effective, progress towards targets should be assessed more frequently and corrective action taken as necessary.

HR Business Partners need to be able to calibrate the set of performance ratings to:

- Check that there is a suitable spread
- Ensure that there is no bias or discrimination on grounds of ethnicity, sex, religion, age or disability
- Identify managers who appear unduly tolerant or harsh, and then be able to contribute performance targets for the managers accordingly

All too often promotion decisions are based simply on performance in the current role. However, past performance is no guide to the future, and less than a third of top performers have the potential to succeed at a higher level. Promotion should be based on an employee's ability, ambition and engagement.

Managers' assessments of these three attributes are needed to enable HR Business Partners to prepare succession plans and promotion recommendations, as well as suitable personal development plans for the unsuccessful promotion candidates to enable them to demonstrate their potential to be successful at a higher level. As the trend to more home working and smart working gathers pace and Generation Y enters employment, the need to set SMART objectives and monitor performance efficiently and effectively will become a key determinant of organisational performance.

*“On average, 50% of a HR department’s time is spent processing employee information and answering questions.”*

– Forrester Research

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## The Solution

OnBase provides a secure environment for the development and cascade of corporate objectives. OnBase workflow enables the final set of objectives to be circulated to senior executives for approval, before a controlled cascade using OnBase interactive forms throughout the organisation. At each stage of the cascade, managers can adapt the objectives to make them relevant to each person’s role and also add in personal training and development targets. The interactive forms ensure that all objectives follow the SMART format, and provide a clear distinction between corporate targets and those related to personal development plans. At each level, employees acknowledge that they understand and accept their personal objectives. Your HR Business Partners will be able to monitor these acknowledgements and to work with line managers to resolve any uncertainty or disagreements arising.

OnBase enables each employee to access his or her performance management form at any time and to record progress towards, or completion of, objectives. This triggers a notification to be issued to the employee’s manager. Managers are also sent reminders to follow up progress in personal meetings with their subordinates in line with your HR policy. Managers can confirm the completion of an objective or progress made, and add or amend objectives as required. With closer control over the setting and monitoring of objectives, you will notice faster progress towards corporate goals, greater flexibility to meet changing circumstances, more dynamic management and greater employee engagement.

Your annual review process will be simplified and more rigorous. Managers will be able to record a summary and rating of each employee’s performance. Each employee will also be able to comment on his or her appraisal, and the completed interactive forms will be available to be included in employee files. HR Business Partners are able to monitor ratings for completeness and chase up those missing. Once complete, you are able to calibrate the ratings against all your requirements and at any chosen level within your organisation. Once confirmed, the performance ratings will be available as input to decisions regarding changes to compensation and promotions.

A section of the OnBase interactive form is reserved for managers to record information relating to promotion and is not accessible by their subordinates. In this section, managers can record their assessment of an employee’s ability, ambition and engagement, areas for development and when they are likely to be ready for promotion. OnBase makes this information securely available to the members of promotion panels to select successful promotion candidates.

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## Why OnBase?

We understand that managing employees – your most important asset – is vital to the success of your organisation. That’s why OnBase offers solutions covering the full employee lifecycle from recruitment to termination.

For some, OnBase Performance and Promotion Management is a stand-alone solution for effective and efficient management of staff to meet corporate goals and ensure personal development. For others, it a logical extension to OnBase Employee File Management, Employee Self Service and/or Manager Self Service. Whichever way, OnBase integrates with your HR systems, including payroll and ERP applications, and you get more from your current software investment.

OnBase Performance and Promotion Management helps your organisation achieve its objectives through clear setting and monitoring of personal performance targets and the development of staff to be your future leaders.

Learn more at [Hyland.com/uk/hr](http://Hyland.com/uk/hr)

**OnBase**<sup>®</sup>  
a Hyland Software solution