

Checklist for Implementing a New Performance Management Process



Use this checklist when you are designing and implementing a new or improved performance management process

Project Planning		
1	Have you formed a project team and assigned a project manager?	<input type="checkbox"/>
2	Does your project team include line managers and employees as well as HR?	<input type="checkbox"/>
3	Have you created a project plan covering the whole project from planning through to post-launch?	<input type="checkbox"/>
4	Have you assigned dates and responsibilities to each task in the plan?	<input type="checkbox"/>
5	Have you thought about risks – what could prevent the project from succeeding and how could that be mitigated?	<input type="checkbox"/>
6	Does everyone in the project team have a copy of the latest plan and know their responsibilities?	<input type="checkbox"/>
Internal Consultation		
7	Have you defined your overall goals for your new performance management process?	<input type="checkbox"/>
8	Have you established your success measures for the new process?	<input type="checkbox"/>
9	Have you sought feedback from across the business on what did and did not work well with your old performance management process?	<input type="checkbox"/>
10	Have you shared the feedback with top management and got their input into how things can be improved?	<input type="checkbox"/>
11	Have you shared the feedback with a selection of line managers and employees from around the business and sought their ideas for improvement?	<input type="checkbox"/>
Design of New Process		
12	Have you researched latest thinking and ideas on performance management and assessed their suitability for your organisation?	<input type="checkbox"/>
13	Will your new process encourage year-round performance management?	<input type="checkbox"/>
14	Will your new process emphasise discussing future priorities, plans and actions as well as reviewing the past?	<input type="checkbox"/>
15	Have you kept your new process as simple as possible?	<input type="checkbox"/>
16	Are all the questions in your review forms really necessary? Do you genuinely need to capture all the information you are asking for?	<input type="checkbox"/>
17	Will your new process involve assigning an overall performance rating? If so, have you fully weighed up the pros and cons of doing this?	<input type="checkbox"/>
18	Will your new process involve an online system? If so, have you worked through our Performance Management System Implementation Checklist?	<input type="checkbox"/>

Internal Buy-in		
19	Have you got agreement from your top management to publicly support the new performance management process?	<input type="checkbox"/>
20	Have you spent time with your senior management to ensure they lead by example with the new process?	<input type="checkbox"/>
21	Have you spent time with key influencers from around the business (including the cynics) to engage them?	<input type="checkbox"/>
Training and Communication		
22	Have / will you train your managers and employees in key performance management skills?	<input type="checkbox"/>
23	Will your important communications come from top management rather than HR?	<input type="checkbox"/>
24	Will staff be communicated to at least 3 times about the new process?	<input type="checkbox"/>
25	Have you planned a variety of different communication methods (emails, videos, webinars, briefings, newsletters etc.)?	<input type="checkbox"/>
26	Have you identified internal performance management 'champions' who can be involved in the communication and training?	<input type="checkbox"/>
27	Do your communications and training emphasise the benefits for managers and employees of performance management ('What's in it for me?')	<input type="checkbox"/>
Pilot Test and Launch		
28	Have you run a pilot test of the new process with at least 2 different departments?	<input type="checkbox"/>
29	Have you updated your processes, training and communications based on the feedback from the pilot test?	<input type="checkbox"/>
30	Have you put in place processes to measure the success of your new process against the original goals you set out?	<input type="checkbox"/>
31	Have you planned ongoing communications emphasising success stories and the benefits achieved?	<input type="checkbox"/>

For tips on how to make performance management a success in your organisation, sign up for our free 10-part performance management email masterclass at www.clearreview.com/masterclass