

# Modern performance management with Totara Perform





# Robin Petterd

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'Learning While Working' podcast



Sprout Labs builds digital learning platforms that enable you and your team to author, deliver and measure high impact digital learning ecosystems.





# Other content from Sprout Labs

- The Learning While Working podcast
- The blog
- eBooks
- Recordings of past webinars
- Virtual conferences



# What we are thinking about today

- Why performance management is important in the age of reskilling
- How performance management underpins your learning ecosystem
- Why integrated learning and performance are key to modern performance management
- How Totara Perform supports modern approaches to performance management



Work has been changing



## Josh Bersin on the future of work **now**


"We now understand, thanks to the pandemic, that work is all about empowerment, safety, **development** and agility."



Accenture chief technology officer quoted in a Wall Street Journal article as saying:


Executives have this idea that 'as my people become obsolete, I'll just hire new people.'

**Well, they won't be there.**



We are in  
the age of  
reskilling





# The death of the yearly performance review

Performance is now an ongoing conversation



## What organisations want


- Employees achieving goals
- Developing their capabilities for the future of the organisation

## What employees want

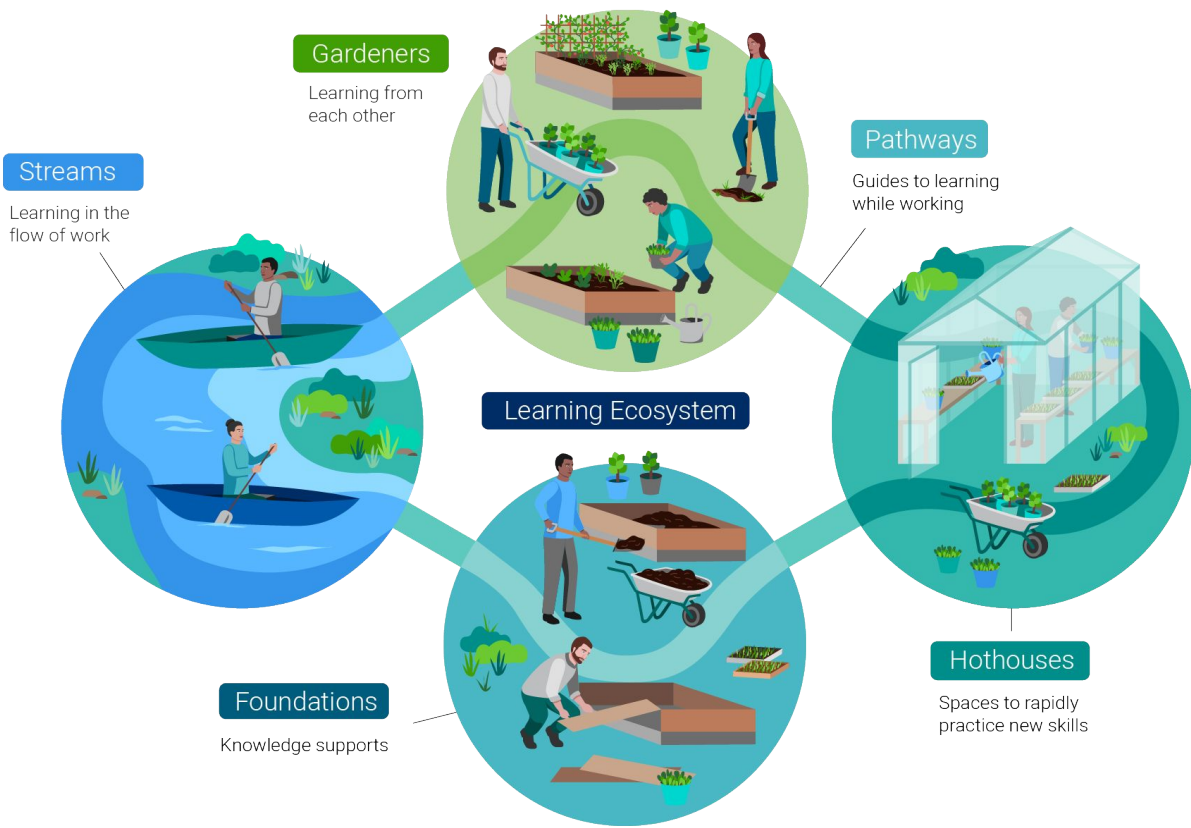
- Growth opportunities
- Feedback



	<b>Past</b>	<b>Modern approach</b>
<b>Timing</b>	Once a year - maybe a mid year check-in	Ongoing - weekly, monthly
<b>Focus</b>	A 'training plan'	Linked to organisation and personal performance goals
<b>Measurement</b>	Ratings	Goals and competencies
<b>Organisation</b>	Managing under performance	Capabilities for the future
<b>Employee</b>	Dread	Something they look forward to
<b>Manager role</b>	Something HR requires	Core part of being a leader



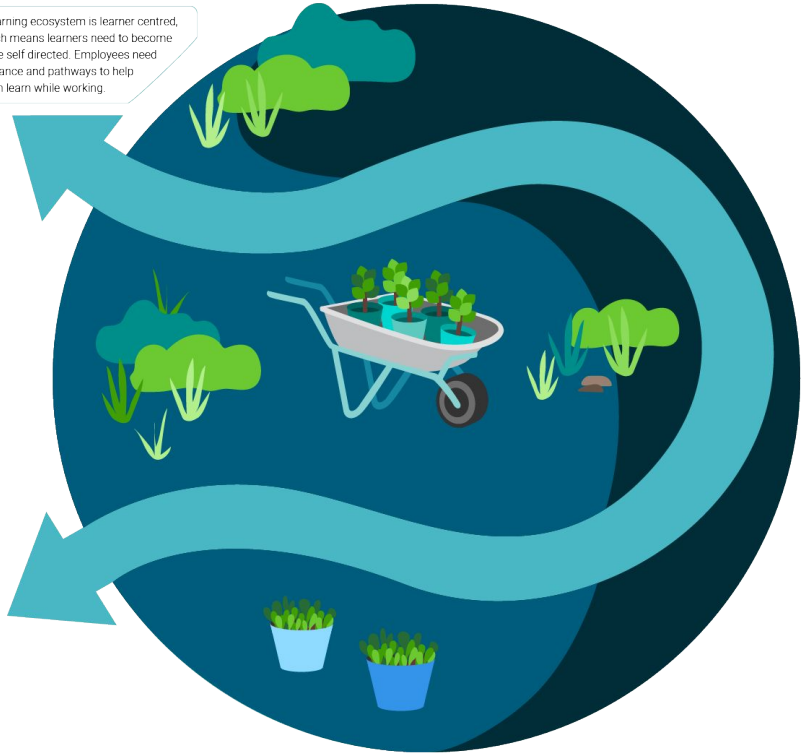
This all  
needs to be  
automated



## Pathways

### Guides to learning while working

A learning ecosystem is learner centred, which means learners need to become more self directed. Employees need guidance and pathways to help them learn while working.

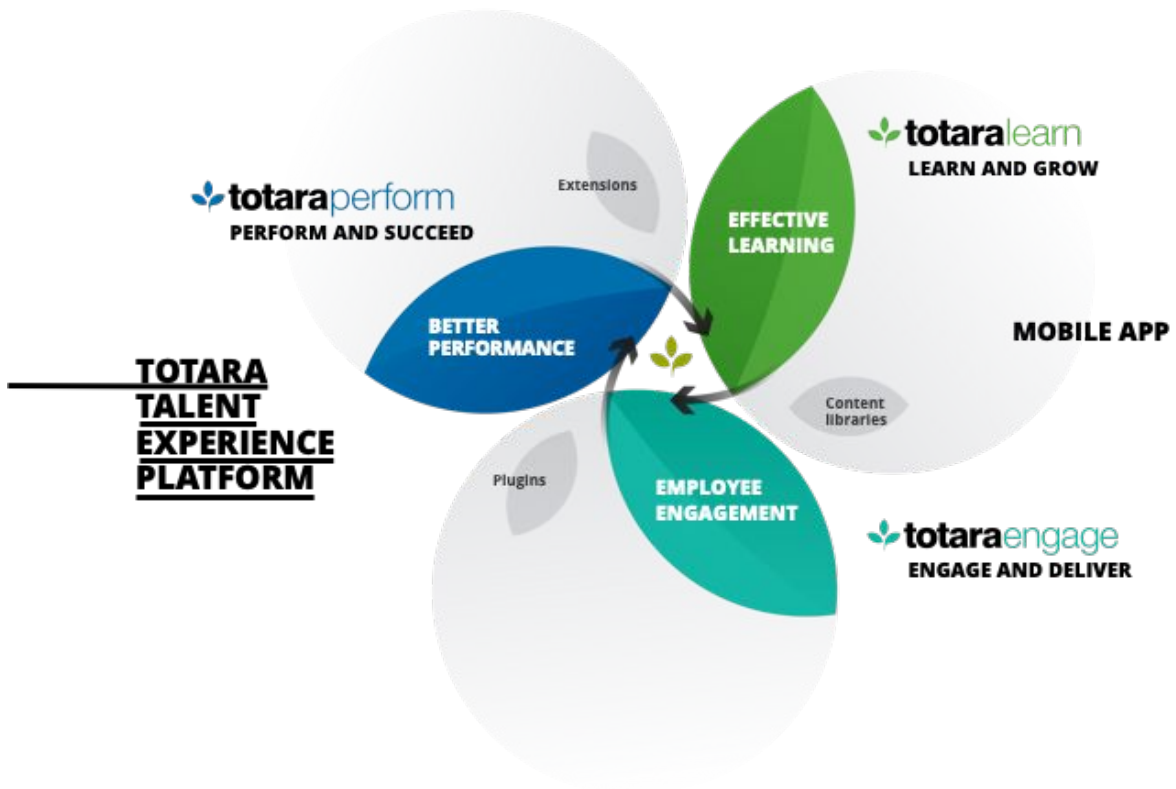


- Goals and plans for achieving them
- Competency tracking
- Feedback - from manager and peers

**Manager roles becomes focused on being a 'learning leader'**



# Totara Perform and modern performance management





# RAPIDLY GROWING

**1800**  
CUSTOMERS

**19 million**  
USERS

**300+**  
SUCCESS STORIES SHARED





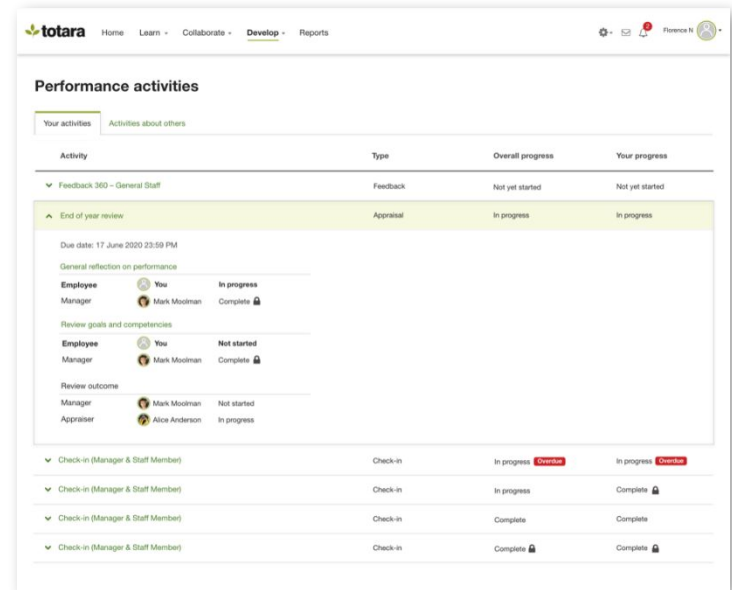
## Totara core

- Automation
- Reporting
- HR Import
- Multitenancy
- Open technology and easy to use
- Can be customized and personalized
- Highly adaptable
- Cost effective

# What is Totara Perform?

Totara Perform is a **continuous performance management system** that empowers you to:

1. Manage organizational and personal goals
2. Manage skill competencies
3. Deliver performance activities:
  - Appraisals
  - Feedback
  - Check-ins
4. Deliver detailed reporting on performance
5. Support a transition from current practice to best practice

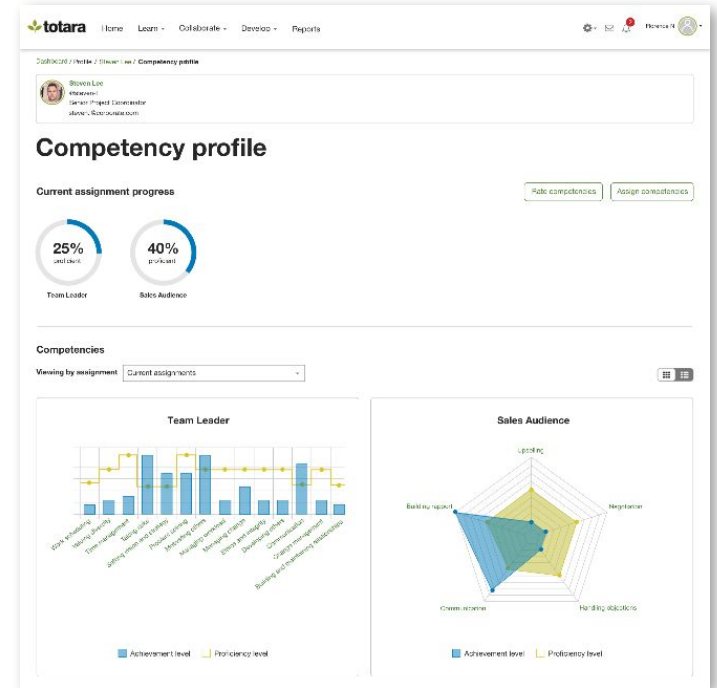


# Totara Perform Benefits

Harness the power of continuous performance management to boost workplace productivity, anytime, anywhere.

## Benefits:

1. Achieve alignment between staff and managers
2. Supports traditional and modern performance management
3. Adaptable to meet the organization's unique needs
4. Connects performance with learning





# Totara Perform key features

## Key features:

- Performance activities
  - Appraisals
  - Feedback
  - Check-ins
- Performance review workflow builder
- Flexible check-ins
- 360-degree feedback
- Skills tracking and development
- Powerful graphical reporting
- Personal and organizational goals
- Advanced competency assignment and tracking
- Competency profile
- Multiple achievement paths for competencies
- Tailored content



Your learning  
platform  
becomes a  
place to **grow**

It's not just a  
place for  
compliance  
courses

# Totara Perform + Totara Learn

Align learning programs with corporate objectives and increase employee engagement and motivation.

Examples of benefits from combining Totara Perform with Totara Learn:



## Engage & motivate staff

Use performance management activities to identify areas for professional development.



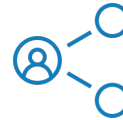
## Steer the ship

Align training and development with corporate goals.



## Measure progress

Review competency improvements from training in appraisals.



## Share knowledge

Help employees get up to speed quickly with relevant achievement paths and learning plans.



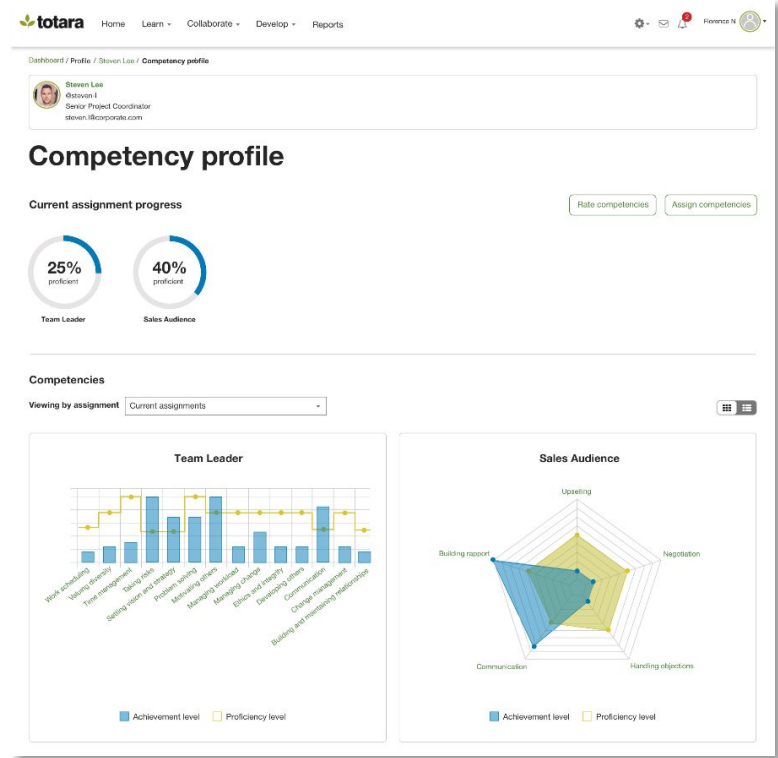
# How Totara Perform works



# Competencies

Give your team the skills they need to succeed

- Provide transparency and create hierarchies around the skills and capabilities employees need in their role.
- Organize competencies by audience, position, organization or by individual.
- Clearly show the training individuals need to reach a certain competency.
- Add proficiency scales to competencies.
- Upload competencies via HR Import.



# Achievement paths for competencies

Help your staff reach their goals, build a highly skilled and motivated team

- Set achievement paths with training aligned for each of your competencies.
- Use flexible options to rate and score competency improvements.
- View competency scales for individuals before and after training.
- Support your team in achieving their professional goals.

The screenshot displays the 'Edit competency: Commitment to Excellence' interface. It features three tabs: 'GENERAL', 'LINKED COURSES', and 'ACHIEVEMENT PATHS', with the latter being the active tab. Below the tabs, there is a section for 'Achievement paths' with an 'Add achievement path' button. Underneath, the 'Overall rating calculation' is set to 'Highest'. A section titled 'Proficient values marked with' contains three criteria groups: 'Competent', 'Competent with supervision', and 'Not competent'. The 'Competent' group includes 'Proficiency in other competencies' (with a dropdown arrow), listing 'Commitment to Customer Excellence' and 'Customer Relationship Management', and an 'Add competencies' button. It also has an 'Aggregation' section with 'Complete all' selected and 'Complete 1' as an option. The 'Competent with supervision' group includes 'Course completion: Linked courses'. The 'Not competent' group includes 'Assignment activation'. At the bottom, there are 'Apply changes' and 'Cancel' buttons.

# Performance activities



Build appraisals and processes that work perfectly with your organization

- Tailor appraisals, feedback and check-ins to suit your organizations needs.
- Ensure confidentiality with comprehensive access and visibility controls.
- Automate the scheduling of performance activities in a flexible manner.
- Build editable and searchable reports.
- Drill into the details of performance activities easily.

The screenshot shows the Totara Performance data interface. At the top, there's a navigation bar with 'totara' logo and links for Home, Learn, Collaborate, Develop, and Reports. Below that, a breadcrumb trail reads '< All performance data records'. The main heading is 'Performance data for End of year review 2020: 10 records shown'. A search filter section allows users to filter by Section, Element type, Responding relationship, Question text, and Reporting ID. Below the filters, a summary bar indicates '10 records selected' and an 'Export all' button. The main content is a table with columns: Question text, Section, Element type, Responding relationships, Required, Reporting ID, and Actions. The table lists various performance questions and their associated data.

Question text	Section	Element type	Responding relationships	Required	Reporting ID	Actions
How satisfied are you with performance this year?	General reflection...	Custom rating scale	2	Yes	-	[edit] [delete]
Any areas of exceptional performance you'd like to...	General reflection...	Long text	2	Yes	-	[edit] [delete]
Any areas of exceptional improvement you'd like to...	General reflection...	Long text	2	Yes	-	[edit] [delete]
To what degree were goals met this year?	Review goals and...	Multichoice: Single select	4	Yes	-	[edit] [delete]
Comment on competencies in which proficiency was...	Review goals and...	Long text	4	Yes	-	[edit] [delete]
Comment on competencies in which proficiency was...	Review goals and...	Long text	2	Yes	-	[edit] [delete]
Do you recommend that this employee receive a...	Review outcome	Multichoice: Single select	3	No	-	[edit] [delete]
Do you recommend that this employee receive a...	Review outcome	Multichoice: Single select	3	No	-	[edit] [delete]
General comments	Review outcome	Long text	3	No	-	[edit] [delete]
Please supply a final rating for this employee	Review outcome	Numeric rating scale	3	Yes	final_score	[edit] [delete]

# Check-ins



Drive efficiency and get a holistic view of performance with structured check-ins

- Create, assign and record tailor-made check-ins.
- Easily review check-in activities and completion for each employee.
- Assign check-in activities by organization, audience or position.
- Automate check-in bookings and notifications.
- Provide employees with dashboards on which they can review the activities assigned to them, complete them or save them as drafts.

**totara** Home Learn Collaborate **Develop** Reports 🔍 👤 Dorothy Malone 🔒

**Dorothy Malone** Your relationship to use **Self**

### General feedback

**Personal growth**

**Satisfaction**

**Experience with your manager** 🔒 👤 show others' responses

(Response required)

Do you feel your manager is honest, ethical, and trustworthy? \*

Your response  Yes  No

Is your manager accessible to you? \*

Your response  Yes  No

Does your manager provide you with the support needed for you to do a great job? \*

Your response  Yes  No

Does your manager set you clear goals? \*

Your response  Yes  No

Please provide any other feedback you feel appropriate (optional)

Your response

**Submit** **Cancel**

You are logged in as Dorothy Malone [Log out](#)

Powered by Totara Learn

# Feedback



Structure feedback in a way that works for your business, supply fair and transparent feedback for staff.

- Easily create tailor-made feedback performance activities.
- Assign feedback activities based on a user's audience, organization or position.
- Create 360 or 270 feedback forms for job assignments or as a one off.
- Create your own type of feedback form.
- Distribute feedback forms to a wide range of people.
- Anonymize responses and apply visibility restrictions.

**totara** Home Learn Collaborate Develop Reports Dorothy Malone

**General feedback** Your relationship to user: Self

**Company environment**

Your anonymous response (into all participants) has submitted and is visible to: your Managers  Show others responses

**Do you enjoy the company's culture?\***

Your response  Yes  No  Bit of it

**Do you feel connected to your coworkers?\***

Your response  Yes  No

**If you do not feel connected to your coworkers could you explain why? (optional)**

Your response

You are logged in as Dorothy Malone

Powered by Totara Learn

# Scheduling



Save time and money by automating repetitive tasks and reminders.

- Ensure performance activities are timely and relevant by utilizing the comprehensive assignment and scheduling functionality.
- Assign activities by organizational frameworks, audiences or position frameworks.
- Send push notifications.

The screenshot displays the Totara Performance activities interface. The top navigation bar includes the Totara logo and menu items: Home, Learn, Collaborate, Develop, and Reports. The user profile for Florence N. is visible in the top right corner.

### Performance activities

Activity tabs: Your activities (selected), Activities about others

Activity	Type	Overall progress	Your progress
Feedback 360 - General Staff	Feedback	Not yet started	Not yet started
End of year review	Appraisal	In progress	In progress

**End of year review** (Due date: 17 June 2020 23:59 PM)

General reflection on performance

Employee	Manager	Status
You	Mark Moolman	In progress
You	Mark Moolman	Complete

Review goals and competencies

Employee	Manager	Status
You	Mark Moolman	Not started
You	Mark Moolman	Complete

Review outcome

Manager	Appraiser	Status
Mark Moolman	Alice Anderson	Not started
Mark Moolman	Alice Anderson	In progress

Check-in (Manager & Staff Member)

Manager	Staff Member	Overall progress	Your progress
Mark Moolman	Alice Anderson	In progress <b>Overdue</b>	In progress <b>Overdue</b>
Mark Moolman	Alice Anderson	In progress	Complete
Mark Moolman	Alice Anderson	Complete	Complete
Mark Moolman	Alice Anderson	Complete	Complete

# Reporting

## Easily organize and schedule your performance activity reports



- Apply a report ID to specific questions. Then, pull the questions into any report using the ID.
- Provide employees with simple dashboard reporting, detailing performance activity progress.
- Easily create graphs and visualizations of your data.
- Export reports.
- Schedule reports to be automatically sent to you and other users, inside or outside the organization.


The screenshot shows the Totara Reports interface. At the top, there's a navigation bar with 'totara' logo and links for Home, Learn, Collaborate, Develop, and Reports. Below that, a breadcrumb trail reads 'All performance data records'. The main heading is 'Performance data for End of year review 2020: 10 records shown'. There's a 'Search by' section with filters for Section (All), Element type (All), Responding relationship (All), Question text (contains), and Reporting ID (contains). Search and Clear buttons are present. Below the filters, it says '10 records selected' and an 'Export all' button. A table displays the following data:

Question text	Section	Element type	Responding relationships	Required	Reporting ID	Actions
How satisfied are you with performance this year?	General reflection...	Custom rating scale	2	Yes	-	[Icons]
Any areas of exceptional performance you'd like to...	General reflection...	Long text	2	Yes	-	[Icons]
Any areas of exceptional improvement you'd like to...	General reflection...	Long text	2	Yes	-	[Icons]
To what degree were goals met this year?	Review goals and...	Multichoice: Single select	4	Yes	-	[Icons]
Comment on competencies in which proficiency was...	Review goals and...	Long text	4	Yes	-	[Icons]
Comment on competencies in which proficiency was...	Review goals and...	Long text	2	Yes	-	[Icons]
Do you recommend that this employee receive a...	Review outcome	Multichoice: Single select	3	No	-	[Icons]
Do you recommend that this employee receive a...	Review outcome	Multichoice: Single select	3	No	-	[Icons]
General comments	Review outcome	Long text	3	No	-	[Icons]
Please supply a final rating for this employee	Review outcome	Numeric rating scale	3	Yes	final_score	[Icons]



# How to build an 'Activity'





If you are interested in taking a look closer at the Totara Perform please reply to any email messages from Sprout Labs to start a conversation.



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