

Client Brief: Performance and Progression Review Software Solution

1. Introduction and Background

- **Project Overview:** We are initiating a tender process to procure a software solution designed to streamline and enhance our current performance and progression review process. Our aim is to implement a system that reduces administrative overheads, improves the quality of feedback provided, and supports a more efficient and consistent review cycle.
- **Purpose of the Brief:** The purpose of this document is to provide prospective consultancies with the requisite information regarding our requirements, thereby enabling them to prepare comprehensive and competitive proposals for the development and implementation of a Performance and Progression Review Software Solution.

2. Project Scope and Requirements

- **Problem Statement:** Our existing performance and progression review process, whilst effective, is cumbersome and presents logistical challenges. This manifests in time-consuming administrative tasks, difficulties in obtaining timely and meaningful feedback, challenges in ensuring process familiarity amongst participants, and inefficiencies in the collation and synthesis of review data. Furthermore, we encounter difficulties in securing consistent, high-quality feedback due to the need for cross-referencing documents, the time involved in feedback collation, and the complexities of detecting and mitigating bias, which impedes the accurate assessment of colleagues within the 9-box grid model.
- **Objectives and Goals:**
 - Reduce the time expended on administrative tasks related to the performance review process by 25% within 6 months of implementation.
 - Increase the proportion of employees providing timely and meaningful feedback by 25% within 12 months.
 - Improve the consistency and quality of feedback, leading to a 25% enhancement in the accuracy and reliability of performance appraisals within 12 months.
 - Streamline the collation and analysis of feedback data, decreasing the time taken to determine employee placement in the 9-box grid by 40% within 6 months.

- Enhance the overall user experience and satisfaction with the performance review process, as measured by employee surveys, within 12 months.

3. Functional Requirements

The software solution must incorporate, but not be limited to, the following functionalities:

- **Automated Workflow Management:**
 - Automated notifications and reminders for each stage of the review process.
 - Tracking of review progress and identification of outstanding tasks.
 - Digital submission and storage of all review-related documentation.
- **Self-Review Capabilities:**
 - Online forms for employees to complete their self-assessments.
 - Integration with career framework descriptions and attribute definitions.
 - Functionality to record employee achievements, development goals, and support requirements.
- **Peer Feedback Management:**
 - Automated requests and submission of peer feedback.
 - Ability for employees to nominate peer reviewers.
 - Standardised feedback forms with clear guidelines and scoring scales.
 - Features to promote constructive and actionable feedback.
- **Data Collation and Analysis:**
 - Automated collation of self-review, peer feedback, and other pertinent data.
 - Tools to analyse feedback data and identify trends, strengths, and areas for development.
 - 9-box grid visualisation and reporting capabilities.
 - Reporting facilities to track key metrics and generate performance review summaries.
- **Reviewer and Management Tools:**
 - Dashboards for managers and HR to monitor review progress.
 - Tools for managers to provide feedback, add commentary, and record review outcomes.
 - Functionality to document action plans, development goals, and support provided.
 - Approval workflows for review outcomes (e.g., by HR or senior management).
- **Reporting and Analytics:**
 - Generation of reports on review completion rates, feedback quality, and performance trends.

- Customisable dashboards for various user groups (employees, managers, HR).
- Data export functionality.

4. Non-Functional Requirements

- **Performance:**

- The system should exhibit responsiveness with minimal loading times (e.g., page load times under 2 seconds).
- The system must be capable of handling a high volume of concurrent users during peak review periods.
- The system should be scalable to accommodate future growth in employee numbers.

- **Security:**

- The system must adhere to all relevant data protection regulations, including GDPR.
- Secure storage of employee data with appropriate access controls and encryption.
- Audit trails to track data access and modifications.
- Regular security assessments and vulnerability testing.

- **Usability:**

- The system should be intuitive and user-friendly for all employees, irrespective of their technical proficiency.
- A user-friendly interface with clear navigation and instructions.
- Accessibility compliance (e.g., WCAG) to ensure usability for individuals with disabilities.

- **Maintainability:**

- The system should be designed to allow for straightforward updates and modifications.
- Comprehensive documentation for system administration and maintenance.
- Vendor support and ongoing maintenance agreements.

- **Reliability:**

- The system should demonstrate high uptime (e.g., 99.9% availability).
- Robust error handling and data backup/recovery mechanisms.

- **Portability:**

- The system should be accessible via standard web browsers (Chrome, Firefox, Safari, Edge).

- **Integration Requirements:**

- The software must integrate with our existing HR information system, BambooHR, via API.
- The integration should enable seamless data transfer of employee information (e.g., employee ID, name, department, job title).

- The API integration must be well-documented and secure.

5. Optional/Desired Features

- AI-powered feedback analysis to identify sentiment and potential bias (High Priority).
- Integration with learning and development platforms to suggest training based on review outcomes (Medium Priority).
- Continuous feedback functionality to facilitate ongoing feedback collection throughout the year (Medium Priority).
- Goal-setting and tracking features (Low Priority).

6. Out of Scope

The following items are explicitly excluded from the scope of this project:

- Development of new HR policies or amendments to the existing career framework.
- Procurement of hardware (servers, computers, etc.).
- Data migration from systems other than BambooHR (this will be handled separately).