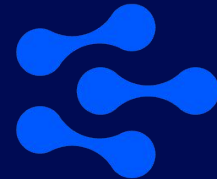


# Cognitive Automation Labs

Promotion & Performance Review Playbook 2023



Cognitive  
Automation  
Labs

# Promotion & Performance Review Playbook

The CA Labs promotion process ensures an objective measurement of candidates against a defined set of criteria to determine attainment of a promotion. Our career pathway process is aligned to international SFIA standards and provides clear, transparent framework for career progression.

Additionally to our promotional process we hold an annual performance review. In this review we discuss performance against a set of predefined criteria that ranges from operational efficiency, through to upskilling and innovation within CA Labs.

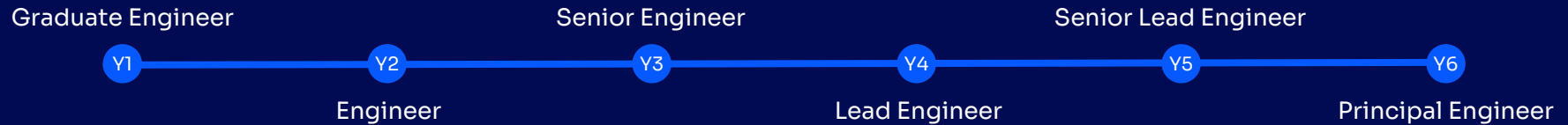
The purpose of this document is to explain the process and the elements which are considered for various levels of promotion so that it can be referred to candidates seeking promotion.



# Promotion Pathways

The following exhibits the roles available for CA Labs employees following the Technical Career Pathway.

The positions are illustrated based on seniority however it does not indicate a linear pathway to any given role.



# Promotion Process

1. **Seek Endorsement:** Discuss your desire for promotion with your Career Coach and then seek endorsement from the Leadership Team.
2. **Self-Assessment:** Complete the self-assessment sections of the Promotion Workbook for the role you're targeting and pass it on to your career coach.
3. **Feedback:** Your Career Coach will fill in the Feedback and Assessment sections, as well as any development plan items for any criteria not met or requiring development.
4. **Suitability:** Your Career Coach will discuss suitability for promotion with your Practice Manager and will either be approved or areas of development will be identified.
5. **Collate:** Collate supporting material and liaise with your Career Coach to submit to the Leadership Team. You are able to apply for promotion once every 3 months.

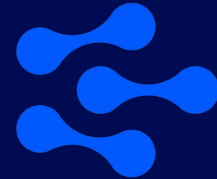


# General Notes

- **SPEAK TO PEERS:** Speaking to peers who have gone through the process is the strongest tool available.
- **DISCUSS YOUR PLAN:** Discuss your development plan with your Career Coach as early as possible – it is important to be on the same page, honest and transparent with them.
- **USE CAREER COACH SESSIONS:** Don't allow one-to-one meetings with your Career Coach to skip. They're the best medium to ensure you're on track and to evaluate your position.
- **AIMING FOR SUCCESS:** It is CA Labs sincere hope that every candidate that applies for a promotion will be successful. However standards are high so it is important to work closely with your career coach to ensure all requirements are met.
- **REFLECT ON YOUR WORK:** While it takes effort to administer the process and get new items such as a customer reference letter, candidates should take this as an opportunity to reflect on their hard work at CA Labs. It's rewarding to take stock of the great work that has been put in, and see it reflected in the comments of peers and customers alike.



# Technical Role Promotion Overview



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# Engineer

- **TIMELINE:** It typically takes an employee one year to reach this level.
- **MENTORING:** Mentoring of junior members participating in conversation on CA Labs community forums.
- **COMMUNITY ENGAGEMENT:** Technical forums (such as Blogs, Tech Talks and/or Practice Groups) at least 3 times per year.



# Senior Engineer

- **TIMELINE:** It typically takes an employee two years to reach this level when starting as a graduate.
- **LEADING:** Leading a technical project team.
- **COMMUNITY ENGAGEMENT:** Contributing to new topics on CA Labs internal forums (such as Blogs, Tech Talks, Mid-monthly meetings, User Group meetings and/or equivalent customer facing forums). You should look to contribute in at least 6 new topics per year on forums, one Google Video recording per year and/or one internal live presentation every 2 years.





# Lead Engineer

- **TIMELINE:** It typically takes an employee three to four years to reach this level when starting as a graduate.
- **RECOGNITION:** Recognition by peers and customers as a technical subject matter expert.
- **COMMUNITY ENGAGEMENT:** Contribution to CA Labs internal forums (such as Blogs, Practice Meetings, Tech Talks, Mid-monthly meetings, User Group meetings or equivalent customer facing forums). At least:
  - two new topics per year on forums, and/or
  - one internal live presentation every year, and/or
  - one external user group presentation every 2 years, and/or
- **INVOLVEMENT:** Attend CA Labs internal events (practice, mid-month, end of month, roundups, social club events) and shares experiences at the events with colleagues at least 6 times a year.
- **THOUGHT LEADERSHIP:** Supply a customer letter from project or group manager, one peer letter, one technical architecture design document, work breakdown estimations, and evidence of thought leadership



# Senior Lead Engineer

- **TIMELINE:** It typically takes an employee four to five years to reach this level when starting as a graduate.
- **RECOGNITION:** Significant contribution as an internal and external subject matter expert.
- **COMMUNITY ENGAGEMENT:** Contribution to CA Labs internal forums (such as Blogs, Practice Meetings, Tech Talks, Mid-monthly meetings, User Group meetings or equivalent customer facing forums). At least:
  - four new topics per year on forums, and/or
  - two internal live presentation every year, and/or
  - one external user group presentation every year, and/or
  - ownership of a technical area e.g. presenting at one external event every 18 months, and/or
  - contribution to pre-sales meetings presenting CA Labs offerings
- **INVOLVEMENT:** Attend CA Labs internal /virtual events (practice, mid-month, end of month, roundups, social club events) and share experiences at the events with colleagues at least 6 times a year. Leads pre-sales efforts for a given capability and influences customer senior business line managers.
- **THOUGHT LEADERSHIP:** Supply a customer letter from project or group manager, one peer letter, one technical architecture design document, work breakdown estimations, and evidence of thought leadership



# Principal Engineer (page 1 of 2)

- **TIMELINE:** It typically takes an employee five to seven years to reach this level when starting as a graduate.
- **RECOGNITION:** Recognised as a trusted adviser by multiple major customers, partners or industry bodies.
- **WORK INFLUENCE:** Track record of influencing major bodies of work at significant customers. Track record of becoming a trusted advisor for CxO level stakeholders.
- **COMMUNITY ENGAGEMENT:** Frequent contribution to internal and external events. Is known by the community as a trusted subject matter expert.
- **COMMUNITY ENGAGEMENT:** Contribution through forums (such as Blogs, Practice Meetings, Tech Talks, Mid-monthly meetings, conferences, external blogs and technical Forums). At least:
  - six new topics per year on forums, and/or
  - four internal live presentation every year, and/or
  - two external user group presentation every year, and/or
  - ownership of a technical area e.g. presenting at one external event every 12 months, and/or
  - contribution to sales meetings presenting CA Labs offerings.

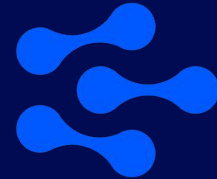


# Principal Engineer (page 2 of 2)

- **WORK INVOLVEMENT:** Attend CA Labs internal /virtual events (practice, mid-month, end of month, roundups, social club events) and shares experiences at the events with colleagues at least 12 times a year.
- **PUBLIC SPEAKING:** Submits at least one international conference abstract per year.
- **THOUGHT LEADERSHIP:** Provide a customer letter from senior executive level, two peer letters, tender response document, strategy document or equivalent, evidence of thought leadership.



# Annual Performance Review Process



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# Performance Review Process

- 1. Target Setting:** Start your year by setting a meeting with your manager to establish your performance targets. This is a crucial step to align your objectives with the larger team and company goals.
- 2. Target Tracking:** Once goals are defined, we enter the tracking phase to monitor your progress throughout the year. Regular check-ins with your manager allow for real-time feedback and necessary adjustments.
- 3. Self Assessment:** Towards the year-end, you'll reflect on your performance and achievements, while your manager will also evaluate your contributions and areas for growth. This dual perspective gives a well-rounded view of your performance.
- 4. Manager's Review:** Next, you'll engage in a one-on-one meeting with your manager to discuss the assessments. This open dialogue allows you to highlight achievements, address concerns, and review your performance for the year providing ensuring your manager is fully aware of all the highlights value that you have created
- 5. Leadership Review and Manager Feedback:** The manager presents Team results to the leadership team for final review and input with outcome and performance rating being passed back to the candidate



# Annual Performance Criteria

## **1. Technical Expertise and Execution (Impact) (40%):**

Evaluates your understanding of your technical abilities, the quality and efficiency of your work. It's all about how effectively you leverage your skills to deliver on your tasks in order to create value for our clients and contribute to the goals of CA Labs.

## **2. Collaboration and Communication (Trust) (25%):**

Focuses on your ability to work within a team and your communication skills. It assesses how effectively you collaborate with peers, share ideas, listen to others, and contribute to a positive work environment and team with clients to ensure overall engagement success building trust both internally and externally with teams.

## **3. Innovation & Adaptability (Innovation) (25%):**

Measures your flexibility and ability to changing technology requirements, picking up new technology frameworks and skills in response to a dynamic technological landscape. It looks at your ability to handle new situations, think outside the box, and use emerging technologies to drive innovative solutions.

## **4. Self defined (Trust, Impact, Innovation) (10%):**

This category is self defined and aims to capture additional dimensions of your role that may not fall directly under the first three categories but contribute to the overall goals of CA Lab. More senior roles will often choose leadership for this 4th category.



# Rating Symbols

**E - Exceptional Performer:** An Exceptional Performer consistently exceeds expectations in all areas of their work. They demonstrate exceptional technical skills, innovative thinking, and outstanding collaboration. They handle change with ease and may also show remarkable leadership abilities. Exceptional Performers are proactive, often taking the initiative to tackle challenges and contribute significantly to the team and company goals. They are role models and may set new standards of excellence within their role.

**F - Full Performer:** A Full Performer consistently meets all expectations associated with their role. They demonstrate strong technical expertise, effective collaboration, and good communication skills. They adapt well to change and, if applicable, show competent leadership. Full Performers are reliable team members who regularly contribute to team and company objectives. They maintain a steady performance and are on the right track for continued growth and success.

**D - Developing Performer:** A Developing Performer is in the process of growing their skills and abilities to meet all the expectations of their role. They show promise in technical abilities, collaboration, and adaptability, but there's room for improvement. They may need additional support or training to fully meet the job requirements or to handle change more effectively. Developing Performers are on a positive trajectory, and with the right guidance and effort, they can progress to become Full or even Exceptional Performers.

**N - Not Rated:** The 'Not Rated' category applies to team members for whom there is insufficient information to provide a comprehensive performance assessment. This might include employees who are new to their role or the organization (less than 6 months), or those who have had significant changes in their role during the evaluation period. It's important to note that a 'Not Rated' classification is not an indicator of poor performance, but rather reflects a need for more time or data to evaluate performance accurately.





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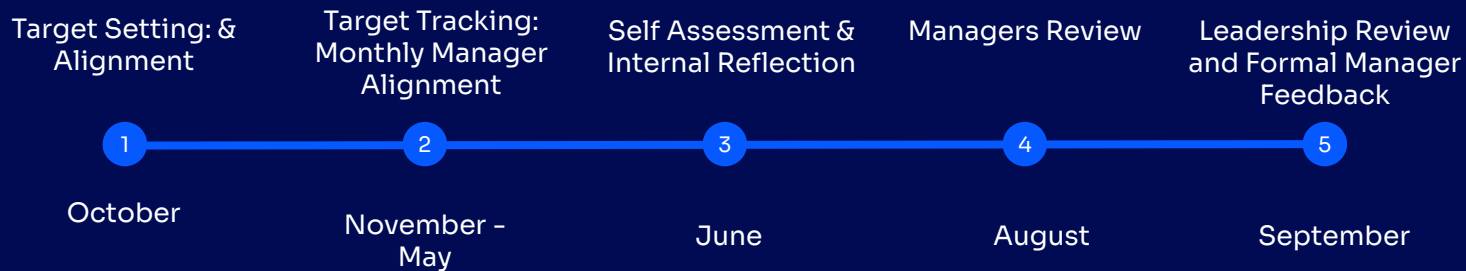


# Performance Review Template

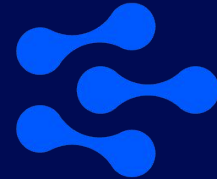
Category	Agreed Objective	Key Results for Measuring Objectives	Weight	Comments	Rating (D/F/E/N)
1. Technical Expertise and Execution	- -		40 %		
2. Collaboration and Communication	- -		25%		
3. Innovation and Adaptability	- -		25%		
4. Self Defined	- -		10%		



# Timelines



Good luck with your  
promotion and  
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