People Management Group (PMG) Process Manual

Version 1.1.1

PMG, PERFORMANCE, OD AND PEOPLE ANAYTICS PROCESS DOCUMENT

UNIT: PMG, PERFORMANCE, OD AND PEOPLE ANALYTICS

1.0. INTRODUCTION:

The Performance, OD and People Analytics Process Manual outlines the step-by-step approach to completing various tasks / activities, Data analyses, JD review and communication within the group.

2.0. PROCESS OVERVIEW:

Process Control	• Setting realistic expectations that are measurable • Data gathering, cleaning and analysis • Performance consequence management
Policy	Performance Management Policy
Objectives	The objective of the performance, OD and People Analytics framework is to align individual employee goals with the organizational objectives. Also, it seeks to enhance the skills and personal development of employees through the managers' support.
Owners	Performance Management, OD and People Analytics Team
Benefits	• Consistent performance • Motivation • Morale and retention • Organizational impacts • Training needs • Optimization risks • Change Management • Uncovering Trends • Preventing Turnover • Upskilling and Reskilling • Skill Gap Analysis
Metrics	Financial, Customer, Process, Leadership and Learning
Reports	• Monthly Report on Employee Performance Check • Weekly Report on Deposit Mobilization Drive • HR Dashboard • Annual Report for Full Year Performance Appraisal • Scorecard reporting for Different Business

3.0. PROCESS NARRATIVES

S/N	ACTIVITY	DESCRIPTION	RESPONSIBILITY	TIMELINE
1	**Employee Target Setting**	**1.1. Key Performance Indicators (KPIs)** 1.1.1. This is used in establishing clear goals, objectives, and parameters for performance in the organization. It is also a quantifiable measure used to how well we are meeting our operational and strategic goals 1.1.2. Engagement sessions are held with various business leaders in Premiumtrust to finalize all performance expectations for the team and the agreed KPIs are cascaded to individuals. 1.1.3. The KPIs are uploaded on HR portal by the Performance, OD and People Analytics Team for all employees for the purpose of confirmation and full year appraisal. 1.1.4. The finalized KPIs are communicated to all employees. **1.2. Objectives and Key Results (OKRs)** 1.2.1 Management of performance by objectives and key results is a performance methodology adopted by the organization to review the task of employees within for specific role within the bank e.g., Digital team, IT etc. 1.2.2 Objectives are set at the beginning of a cycle with the key results as outcome of the goals and/or objectives. 1.2.3 The outcomes are measured at the end of the cycle in line with the objectives and the expected key results	**Performance, OD, & People Analytics Team**	**April to December 2022**
2	**Monthly Performance Check**	**1.1. Employee Monthly Performance Check** 1.1.1. The Employee Monthly Performance Check initiative is designed to track employee monthly activities in line with documented and approved KPIs during target setting.	**Performance & People Analytics Team**	**Monthly**

		1.1.2. PMG Performance, OD and People Analytics Team liaises works work on ensuring that the portal is ready for use. 1.1.3. A communication is drafted and shared with the CPO for approval. 1.1.4. An email is sent to all employees notifying them of the commencement of the Performance Check and providing step-by-step guide on how the exercise is completed. 1.1.5. Support is provided to employees who may have a challenge on the portal by the performance officer. 1.1.6. Further support or intervention is provided by PMG L&D team where there is conflict in the review and feedback process. 1.1.7. All reports are warehouse on SharePoint at the end of the exercise.		
3	**Employee Confirmation Appraisal**	**1.1. Employee Confirmation Appraisal (ECA)** 1.1.1. The ECA exercise is designed to track and record what an employee has achieved under probatory period with the organization and to either confirm the employment relationship or to terminate 1.1.2. The system triggers a notification to the employee via email to begin the confirmation process by submitting already uploaded KPI once the employee clocks 180 days in the system 1.1.3. Supervisor gets a notification that the employee has submitted his/her confirmation appraisal for review 1.1.4. Supervisor rates the employee based on the achievement on the role for the period under review in alignment with KPI and other behavioral parameters 1.1.5. Employee is notified that the Line Manager has appraised him/her, and it is pending their attestation	**Performance, OD & People Analytics Team**	**NA**

		1.1.6. If employee is satisfied with his/her line manager rating and comment(s), they proceed to accept or Reject 1.1.7. If employee accepts, the appraisal status moves to the second line of report e.g., Group Head as the case maybe. But if the employee rejects the supervisor's review, the supervisor is notified for adjustment 1.1.8. Line Managers engages the employee afterwards makes the necessary adjustment 1.1.9. The second line of report inputs comments and make recommendation based on supervisor rating 1.1.10. Employee is notified of his/her second line of report recommendation and the process ends 1.1.11. Employee services and wellness group is notified in the status of the employee confirmation appraisal 1.1.12. Process terminates		
4	**PremiumTrust Full Year Appraisal**	1.1.1. The Performance Appraisals are designed for the evaluation of employees' performance based on agreed objectives during the year. 1.1.2. The full year appraisals are initiated on the first month in the new year. 1.1.3. The performance appraisal module is created on the Premium Performance System. 1.1.4. Performance data is sourced from different business unit e.g., Finance Group, Customer Experience, Compliance, Learning and Development etc. 1.1.5. Performance data are reviewed and uploaded on the appraisal forms of all eligible employees. 1.1.6. Approval is obtained from the CPO to launch the full year appraisals. 1.1.7. An email communication is sent to all employees notifying them of the commencement of the appraisals.	**Performance, OD & People Analytics**	**Full Year**

		1.1.8. Support is provided to employee and line managers who experience challenges in completing the appraisals.		
		1.1.9. At the conclusion of the appraisals, all recommendations and feedback are collated for further review.		
5	**Full Year Performance Appraisals Closure**	**1.1. Appraisal Review Committee (ARC) Session** 1.1.1. The Appraisal Review Committee is made up of Central ARC. 1.1.2. The members of the central ARC are made up of all selected seniors across the organization across all business segments. 1.1.3. A physical or virtual meeting is set up consisting of all members of the committee. 1.1.4. The committee reviews and validates all supervisor and countersigning officers' recommendations. 1.1.5. The final recommendations of the committee are then presented to EXCO for final review. **1.2. Line Director Review** 1.2.1 PMG Performance and the CPO engage the different line directors to review the report of the Appraisal Review Committee for an alignment or otherwise. 1.2.2 The line director approves the recommendations following the review and engagement. **1.3. EXCO Review** 1.3.1. EXCO consists of all Executive Directors and the MD/CEO. 1.3.2. The recommendations of the line Directors are presented to EXCO for their ratification. 1.3.3. Upon deliberation, the final recommendation is presented to the MD/CEO for sign-off. All recommendations are implemented	**Performance, OD & People Analytics Team, ARC and EXCO**	**Within a Month**
6	**Performance Improvement Plan (PIP)**	**1.1 Performance Improvement Plan (PIP)** 1.1.1. A Performance Improvement Plan (PIP) is a formal document stating any recurring performance issues	**Performance, OD & People Analytics**	**Monthly**

		along with goals that an employee needs to achieve to regain good standing within a specified time. 1.1.2. An individual can be placed on the PIP because of poor performance, supervisor recommendation, ARC recommendation and the performance management process. 1.1.3. An email is sent to the individuals to be placed on PIP. 1.1.4. The performance expectations / targets are communicated including the duration of the PIP. 1.1.5. A monthly review is carried out to monitor the progress made by the employee. 1.1.6. At the end of the PIP duration, a performance review is carried out by the Performance, OD and People Analytics team involving the Line Manager and Employee Services & Wellness. 1.1.7. A recommendation is agreed and approved by the CPO. This is then communicated to the individual.		
7	**Organizational Development Process (ODP)**	**1.1. Organizational Development Process (ODP)** 1.1.1. Businesses are requested to submit Submitted their structures. 1.1.2. Structure (Organogram) of all groups or business is reviewed 1.1.3. The organogram is further aligned to Premiumtrust organogram format 1.1.4. A Job Analysis (JA) form is submitted to Line Manager to fill for all roles in alignment with structure submitted 1.1.5. The JA is further broken down into Job Description (JD) by the People Analytics and OD team 1.1.6. The Job Description (JD) for all roles are further reviewed by the Chief People Officer (CPO) 1.1.7. Upon CPO's approval, the JD is communicated to the officer on the role with their supervisor in copy as well as the business head 1.1.8. Communicated KPI are uploaded on the confirmation appraisal portal	**Performance, OD & People Analytics**	**As required**

		1.2. Change Management 1.1.1. The change in any area of the business/ bank is identified either through direct reporting by the business head or through data gathering, etc. 1.1.2. A formal assessment of the change done by reviewing relevant documentation, by holding focus groups, interviewing, or surveying. Gathering all the fact needed to understand the required change management process or recommendation. 1.1.3. The change sponsor or head of the business is engaged on the step-by-step implementation of the change management process 1.1.4. The implementation plan is put into action considering the complexities of the change either using waterfall or agile methodology. 1.1.5. As soon the required change is put in place, with change champions and there is a monthly tracking of progress, and this is done by constant data gathering. 1.1.6. A post implementation data gathering is done to the impact of the change. 1.1.7. Change will be hinged on corporate culture 1.1.8. Continuous communication.		
8	**People Analytics Process (PAP)**	**1.1. People Analytics Process (PAP)** 1.1.1. Weekly update of new hires records into employee database 1.1.2. Categorization into different buckets such as age, population, grade, gender etc., which is numerical 1.1.3. Data are collected from different other sources to enrich HR staff Data base e.g., Monthly Performance Check, Confirmation, Talent Acquisition, Total Rewards etc.	**Performance, OD & People Analytics**	**Weekly**

		1.1.4.	The data is properly organized in excel spreadsheet for the ease of statistical data analysis		
		1.1.5.	Bi-Weekly data clean up to ensure there is no error or misclassification of employee record		
		1.1.6.	A weekly dashboard is created to shows past, present and future state of employees in the organization.		
8	**Deposit Mobilization Drive**	**1.2.** **Deposit Mobilization Drive** 1.2.1. Weekly update of new hires records into employee database 1.2.2. Data is downloaded from flexcube twice in a week 1.2.3. Data downloaded is cleaned and analyze 1.2.4. Report is created and shared with the CPO 1.2.5. CPO reviews and approve 1.2.6. The Report is communicated bank wide to all employees		**Performance, OD & People Analytics**	**Weekly**