

# My Performance

## User Manual Appraiser: Annual Feedback & Discussion



# Legal Disclaimer

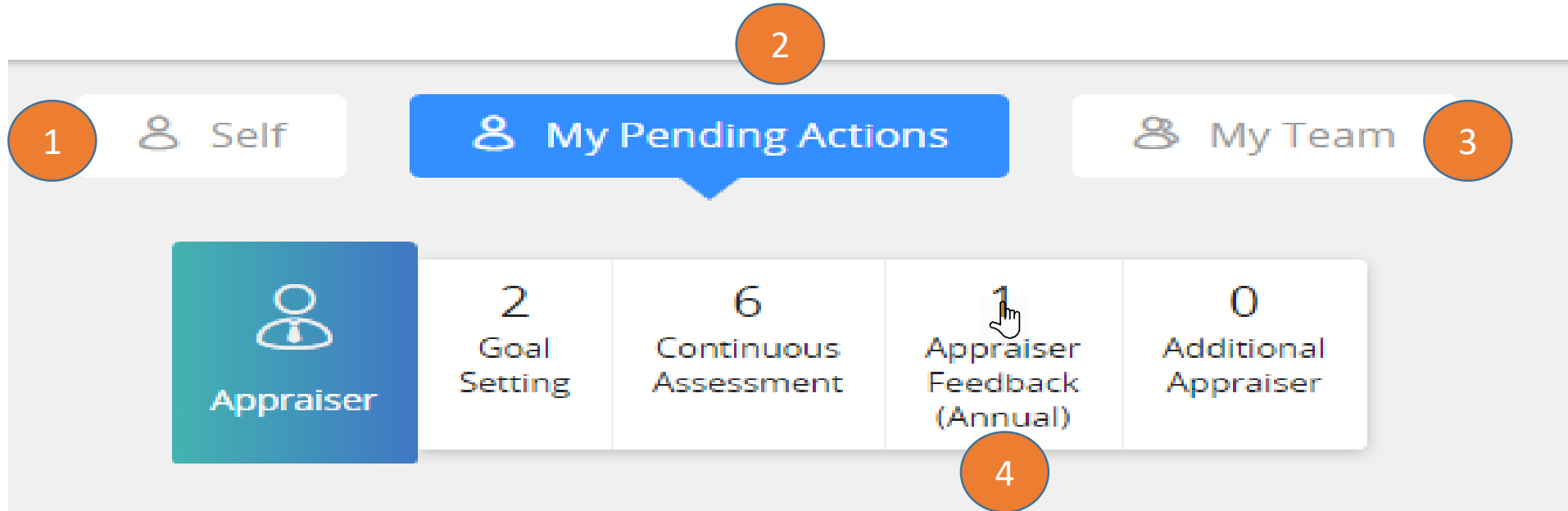
“My Performance” initiative from HCL (‘Company’) consisting of Goal Setting, and Continuous Assessment.

1. May not address every question or every possible circumstance with respect to every employee situation
2. Should be always read in conjunction with applicable laws of the jurisdiction, and the respective employment contract (another applicable employment policies and procedures) pursuant to which an employee has been hired. In case of any conflict between this document on one side and any applicable laws of the jurisdiction or employment contract on the other side, the applicable laws of the jurisdiction or the applicable employment contract, will prevail
3. Nothing in “My Performance” is designed to interfere with, restrain, or prevent an employee from exercising statutory rights, wages, hours of work, collective bargaining or other terms and conditions of employment, which are protected under law. HCL employees have the right to engage in or refrain from such activities
4. In the process of implementation of “My Performance”, Company may receive different types of information about the employee, including: 1) the information the employee chooses to share (such as locational preference, target roles, etc.); 2) Information others share about the employee (peers , managers and others); and 3) Other information the Company receives about the employee (including additional related data or metadata) such as when the employee looks at another employee timeline, post a referral or otherwise interact with the “My Performance” platform. Personal information of any employee that HCL obtains or receives during this process will be held and used in accordance with applicable data privacy laws and HCL’s policy in this regard. It will be treated confidentially and shared internally with a limited number of people who have a need to know or who are responsible for dealing with its implementation. This may, in some cases, include persons in other countries (including India) where HCL does business or have a back office presence. The Company will store such information/data for as long as the employee is employed with HCL and/ or the Company reasonably requires access to such information
5. Notwithstanding anything contained herein, the Company is authorized to share the aforementioned data/information, in case the Company receives any specific direction/s for sharing any data or information regarding an employee from any governmental or judicial or quasi-judicial authority etc.



# Appraiser Feedback Stage (Annual)

## DASHBOARD



### “My Performance” Dashboard:

1. **Self** – You can access/view your own form by clicking on the “Self” Tab
2. **My Pending Actions** – You can view the forms which are pending for your action, stage wise under “My Pending Actions” tab
3. **My Team** – View all your team forms and their pendency at respective stages
4. **Appraiser Feedback (Annual)** – to view appraise forms which have moved to Appraiser stage for Annual Feedback

Appraiser

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details

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## Appraiser Feedback (Annual) – Appraiser Summary Page

The screenshot shows the 'Appraiser Feedback (Annual)' page. At the top, there is a breadcrumb trail: Home / My Team / Appraiser Feedback (Annual). On the right, there is a filter for 'Fresher Cadre' and search/filter icons. A table lists appraiser feedback entries. The first entry is highlighted with a blue checkmark in the first column. Below the table, there is a pagination bar showing 'Showing 1 to 1 of 1 entries' and a dropdown menu set to '10'. A blue button labeled 'EXPORT TO EXCEL' is located below the table. A search bar is visible in the top right corner.

<input checked="" type="checkbox"/>	SAP ID	Employee Name	Band	Country	Role	Project Code / Project	Stage	Review Period	Due Date	View / Action
<input checked="" type="checkbox"/>	51687505	Test Case	E0	INDIA	Customer Support Exe...	Pearson APAC NOIDA	Appraiser Fee...	2017-18		

Showing 1 to 1 of 1 entries

10 « 1 »

EXPORT TO EXCEL

### Appraiser Summary page :

- 1. Select Check Box and Colour Tagging** – To export goal details of Appraisee, select check box and click on “Export to Excel”. Colour tagging will let you know if employee is MT/SMT/Fresher Cadre
- 2. Export to Excel** – You can export all the goal details of Appraisee to Excel. It is advised to maintain an offline file for future use
- 3. Search and Filter** – If you wish to find specific employee details then you can use option of search or filter
- 4. View/Action** – You can see details employee form and that of his goals by clicking on View/Action button

## Appraiser Feedback (Annual) – Employee Profile Details

1

Test Case | Job: Senior Customer Service Executive

Employee ID 51612745	Designation TEAM LEADER - OPERATIONS
Band E1	Job 53011477
Org Sub Unit	Project Code C173661
Date of Joining 26 May'16	Location
Country INDIA	Appraiser
Reviewer	HR
TEX 10 Years	REX 8 Years
Last Promotion Date	

Additional Appraiser View Files

100%

Appraisee Remarks	Achievement	Appraiser Remarks	Score	History	Action
I have stayed comp...	56%	Test	Sele... ▼	🕒	✎

2

### Appraisee Details -

1. Click on employee name to view employee details. All the details are picked from SAP.
2. Click on Action button to update/view employee goals

***Note: Once the form moves to Self Assessment, Job mapping cannot be updated.***

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## Appraiser Feedback (Annual) – Appraisee Goal Details

Test Case | Job: Senior Customer Service Executive

1 **My Goal** (Mandatory) Additional Appraiser View Files

Goal Period: 2017-18 ( 01 Oct'17 – 30 Sep'18 ) **Total Goal Weightage** 100%

Category	KPP	KPP Description	Weightage	Target	Appraisee Remarks	Achievement	Appraiser Remarks	Score	History	Action
Learning	Process Adhe...	Compliant to the d...	100%	50%	I have stayed comp...	56%	Test	Sele... ▼	2	3

### Appraisee Goal Details:

1. **My Goal** – You can view all the details under “My Goal”. You can also cross check Job role of employee against his name on the top
2. **History** – Goal history is visible in form of remarks from Appraisee and Appraiser
3. **Action** – Goal details can be viewed or edited during Appraiser Feedback Stage

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# Appraiser Feedback (Annual) – KPP History

Test Case | Job: Senior Customer Service Executive

My Goal (Mandatory)

Additional AppraiserView Files

Goal Period: 2017-18 ( 01 Oct'17 – 30 Sep'18 )

Total Goal Weightage

100%

Category	KPP	KPP Description	Weightage	Target	Appraisee Remarks	Achievement	Appraiser Remarks	Score	History	Action
Learning	Process Adhe...	Compliant to the d...	100%	50%	I have stayed comp...	56%	Test	Sele... ▾		

KPP History

Appraisee (16 Oct'18 10:55 PM)

Remarks  
I have stayed compliant to the defined process norms and have achieved the set target. Looking forward to the feedback in form of remarks/achievement from Appraiser

Appraiser (28 Sep'18 10:02 PM)

Achievement : 56  
Remarks  
Test

**KPP History:** You can view remarks/comments by you (Appraiser) or Appraisee against all their goals. This will help you see documented comments at the end of the year and the flow of discussions you had during Continuous Assessment



Appraiser Feedback (Annual) – KPP Details

My Goal (Mandatory)

Additional AppraiserView Files

Goal Period: 2017-18 ( 01 Oct'17 – 30 Sep'18 )

Total Goal Weightage100%

Category	KPP	KPP Description	Weightage	Target	Appraisee Remarks	Achievement	Appraiser Remarks	Score	History	Action
Learning	Process Adhe...	Compliant to the d...	100%	50%	I have stayed comp...	56%	Test	Sele...		

KPP Details 2017-18 ( 01 Oct'17 – 30 Sep'18 )

CategoryLearning

KPPProcess Adherence

KPP DescriptionCompliant to the defined process norms

Weight (%)100

Target UnitPercentage (1-100)

Target50

Appraisee Remarks (17 Oct 2018)

I have stayed compliant to the defined process norms and have achieved the set target. Looking forward to the feedback in form of remarks/achievement from Appraiser

Appraiser Achievement56%

Appraiser ScoreSelect

Appraiser RemarksTest

SAVE

CLOSE

- KPP Details under Actions:
- 1. You can view Appraisee Remarks and **update “Appraiser Achievement,” Appraiser remarks”, and “Appraiser Score”** for all KPP’s.
  - 2. You can update the **Appraiser Score** from summary view drop down as well.

## Appraiser Feedback (Annual) – Behavioural Competency

**Behavioural Competency (Mandatory)**

Competency	Level of Proficiency	Appraiser Remarks
<b>Cultural Competence</b> :The demonstrated capability to interface, partner and work effectively with stakeholders across a diverse set of cultures, nationalities, race, age and sex	1 2 3 4 5	Share a critical incidence (Non-mandatory)
<b>Customer Orientation</b> :The demonstrated capability of delighting one's customer by focusing on their needs and ensuring that the customer perspective is the driver behind all value-added business activities	1 2 3 4 5	Share a critical incidence (Non-mandatory)
<b>Passion for Work Excellence</b> :The ability to understand and carry out the duties and responsibilities in a timely and consistent manner and deliver results that exceed one's own standards and also of others	1 2 3 4 5	Share a critical incidence (Non-mandatory)

**Behavioural Competencies are pre-populated basis the Role of the employee.**

- 1. Competency** – You are required to assess Appraisee's on basis the competencies
- 2. Information** – If you wish to know more about a specific competency then click on information icon
- 3. Level of Proficiency** – Rate the Appraisee's against each behavioural competency from 1 to 5. Information on Level of Proficiency – Mouse over on 1 to 5 to read description for each level
- 4. Appraiser Remarks** – You can provide remarks/share a critical incidence against each competency to in terms of level of proficiency

## Appraiser Feedback (Annual) – Successor Identification

### Successor Identification

1

2

#### Successor 1

Select Employee



Readiness

Select



#### Successor 2

Select Employee



Readiness

Select



**Successor Identification Section:** This section will pop-up only for E4&Above employees.

1. Enter SAP ID of the employee who you think can be your successor
2. From the drop down, select the level of readiness from
  - Ready now
  - 0-6 months
  - 1-2 years
  - 3 years

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## Appraiser Feedback (Annual) – Appraiser Recommendation

### Appraiser Recommendation (Confidential) (Mandatory)

2

1

Potential  
Medium

Criticality  
High

Attrition Risk ⓘ



Red



Amber



Green

Comments  
Enter your comments

3

Weighted Average Score  
0.0

Appraiser Rating ⓘ

Threshold Performance

Appraiser Confidential Comments  
Enter appraiser confidential comment

4

5

Last Promotion Date  
N/A

Promotion Recommendation  
NA

What additional role he/she has undertaken?  
Enter your justification here

**Appraiser Recommendation (Confidential) Section:** This section will be confidential and will not be visible to employee at any stage

- Potential & Criticality** – on a scale of High /Medium /low, select from the drop down
  - Attrition Risk** – Select Red/Amber/Green considering the pace at which the employee is likely to attrite
  - Weighted Average Score** – Weighted average score will be calculated by system itself basis the scores given
- Rating** – Basis the weighted average score, select a rating. You cannot select a rating outside the range of weighted average score
- 4. Appraiser Confidential Comments** – Enter your confidential remarks in this section
- 5. Last Promotion date** – will be pre-populated from system
- Promotion Recommendation** – Pre-qualifier checks like Leveraging, last promotion date (greater than 6months) and top 3 rating are built in system for promotion eligibility. Incase the employee is eligible then you can select Yes/No from the drop down menu.
- Additional Role he/she has undertaken** – will be mandatory to fill if the employee is eligible for promotion.

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## Appraiser Feedback (Annual) – Comments and Discussion Details

Comments (Mandatory)

Appraisee Overall Comments

Looking forward to appraiser feedback stage and discussion stage

1 Appraiser Overall Comments

Enter your comments here

2 Annual Discussion Date & Time

Date & Time  
17 Oct '18 | 23: 05

3

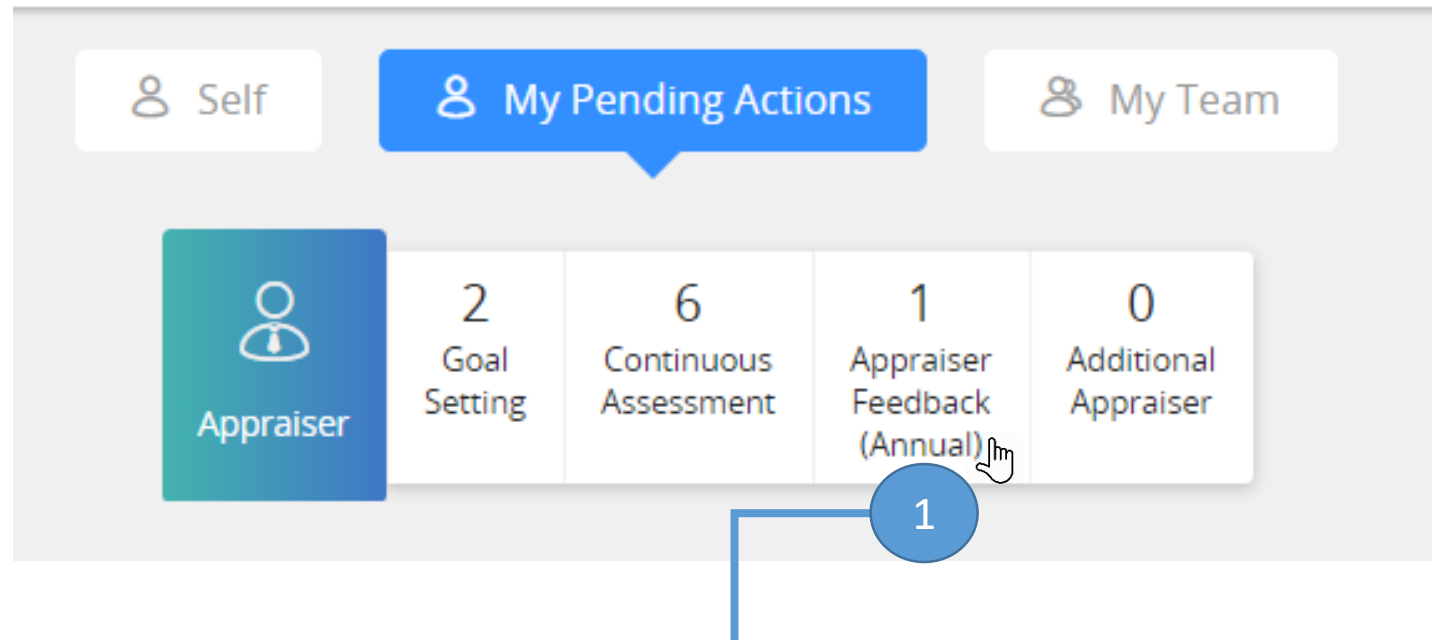
SEND FOR DISCUSSION REFER BACK SAVE

### Comments and Discussion Details:

1. **Appraiser Overall Comments** – Provide Appraiser overall comments in comments section
2. **Annual Discussion Date and Time** – Select discussion date and time
3. **Send for Discussion/Refer Back** – You can either “send for discussion” or “refer back to Appraisee” depending upon the requirement

Appraiser view: When at Discussion  
Stage Appraise Refer backs forms

## DASHBOARD



“My Performance” Dashboard allows you to have complete view of performance cycle and pending actions:

1. **Appraiser Feedback** – If the appraisee **refers back the form** on “discussion stage” then appraiser will see the form again on appraiser feedback stage

Appraiser

Dashboard

Discussion Stage

## Appraiser Feedback (Annual) – Referred back form

**Comments** (Mandatory) –

**Appraisee Overall Comments**


Looking forward to appraiser feedback stage and discussion stage

**Appraiser Overall Comments**

Enter your comments here

**Annual Discussion Date & Time** –

Date & Time

17 Oct'18 | 23: 05 

SEND FOR DISCUSSION

REFER BACK

SAVE

You are required to edit the form (all the sections) as per the discussion you had with your appraisee and send the form back to appraisee

**Please note that you need to hold another discussion session and input the details in the tool under “Annual Discussion Date and Time”. Click on “Send for Discussion” once all the fields are updated appropriately**

Appraiser

Dashboard

Discussion Stage



THANK YOU