

Sheet 3 - Individual Performance KPI Review Sheet

Link to sheet :

https://docs.google.com/spreadsheets/d/1rfP_tJNh8LbF-j1aH9_0qBCXw05aR7iilbucGfGgMgM/edit?gid=1413052365#gid=1413052365

This final sheet was a comprehensive overview on individual performance - grouped monthly, quarterly and annually. These sheets were used in every team member's monthly reviews, quickly highlighting areas that went well and areas where development could be assisted. Previously the older version of this sheet would have taken around 20 minutes per team member to populate, it was very messy, had data redundancy issues, broken conditional formatting and only had groupings by month - with the redesign it was possible to fix all of these issues and introduce further features.

Here were the main benefits of the new sheet:

1. Time for managers to update each sheet was reduced from 20 minutes down to around 5 for all 12 team members each month. Updating the document became a simple copy and paste as the formatting was identical to the Weekly KPI sheet I made. Just copy the person's KPIs from the **Weekly Team KPI Sheet** and paste them onto the performance sheet. I added pale blue highlighting in both sheets so it is clear where to begin the copy from (*weekly KPI sheet*), and then also where to paste it (*Data Entry : Weekly KPIs*), along with a gentle reminder in A1 what document the data is in.
2. Introducing both quarterly and annual groupings, combined with a traffic light conditional formatting system. It was considerably easier to identify patterns and understand data/performance at a glance. It allowed some of the leads and I to begin a skills gap analysis, identifying areas that team members did well in, and also areas that we could focus on for improvement. Further to that we were able to identify who is best to lead those trainings/formulate material based on statistics. I consider this another key contributor for the considerable 15%+ increase in all the key KPIs during my tenure, allowing us to develop people's skills with intention and purpose.

DO NOT EDIT	Year To Date			
	Total	Missed	Hit	
Tertiary Metric 1	269			269
Tertiary Metric 2	472			472
Tertiary Metric 3	51	20	31	61%
Tertiary Metric 4	51	16	35	69%
Tertiary Metric 5	51	17	34	67%
Key Metric 1 Title				
Key Metric 1a	13110	1435	11675	89%
Key Metric 1b		1710		15%
Key Metric 1c - (no input)			9965	76%
Key Metric 2 Title				
Key Metric 2a	30453	7000	23453	77%
Key Metric 3 Title				
Key Metric 3a	1743	456	1287	74%
Key Metric 3b		384		30%
Key Metric 3c - (no input)			903	52%
Secondary Metric 1 Title				
Secondary Metric 1a	278	64	214	77%
Secondary Metric 1b	337	27	310	92%
Secondary Metric 2 Title				
Secondary Metric 2a	1293	159	1134	88%
Secondary Metric 2b		533		47%
Secondary Metric 2c - (no input)			601	46%

3. In order to minimize issues I made it very clear and intuitive which sheets shouldn't be edited. I protected the sheets so they would be prompted with a warning beforehand, and also added a big clear red tag of "do not edit" in A1, along with a red coloured sheet tab. Ultimately these sheets don't need to be edited, as it operates as a dashboard.



4. It helped team members and managers when it came to annual reviews, having much clearer data meant that people could be rewarded accurately for their work in pay rises, or on the other end of the spectrum, performance support plans.

An example of a skill gap analysis we did : when comparing the numbers, it became apparent that Maria Fernandez was consistently scoring the highest scores on the KPIs that involved our users actively signing into the site and taking action. It became clear that she was having great success in setting expectations with these people and she was able to share her approach and learnings through detailed training sessions, which directly impacted the wider team's performance positively on these specific metrics. This type of thing happened on multiple occasions and allowed us to close skills gaps, consistently increasing our teams performance each quarter by more than any other team in the business.