



TALENT MANAGEMENT EVOLUTION



TalentEvolution Training Document

Talent Management Evolution, Inc.

A large, 3D geometric graphic composed of several overlapping, translucent blue and grey rectangular blocks arranged in a complex, angular shape.

2015

Contents

The Individual Contributor (IC) Performance Review Process.....	2
How to Login and Find the Forms.....	2
The Performance Review Form	3
Viewing Submitted Forms.....	4
The Individual Contributor (IC) Level Development Plan / MAM Statement of Intent Process.....	7
How to Login and Find the Forms.....	7
The Development Plan.....	8
Make a Mark Statement of Intent	10
Follow-up Process	12
Editing the Forms	14
Individual Initiated Change	14
Supervisor Initiated Change.....	15

The Individual Contributor (IC) Performance Review Process

How to Login and Find the Forms

- 1) Login using your username and password at <https://www.tmelogin.com/marcusthomas>.
Usernames are case-sensitive!
 - a. Upon your first visit, you will be required to change your password. Please create a password that is between 8 and 25 characters. You can use numbers, letters and special characters. You will not be able to reuse the last five passwords you have used in the past.

By logging on I agree that I have read and understood the above.

Username :	<input type="text"/>
Password :	<input type="password"/>
	<input type="button" value="Login"/>
Forgotten Password?	

- b. Below is a screenshot of your Home page.

mt marcusthomas TalentEvolution™

Logged in: MT Admins

Home Administration Home Reports Performance Management

Account Info
My Account
My Details
My Team (Direct Reports)
My Portfolio
My Dashboard

To-Do Lists
Appraisals (0)
Goals (0)
Questionnaires (0)

Messages
Inbox (0)

Reports
Performance > Potential
Organization Chart

Welcome to Marcus Thomas, LLC's Performance Management Site

The Questionnaire Process
The purpose of the performance management process is to help each of us understand how we behave as we execute against objectives. How we go about our work is a powerful determinant of our company's success and our personal career progression and achievement.
Evaluating your performance through the questionnaire is a collaborative effort between you and your supervisor.
If you click on the to "Review Thought Starters." Similarly, if you click on the next to the Development Plan, there will be additional instructions.

Downloads and Links
You can download a printable version of the training and instructions that can be used to complete the questionnaire.
[Training Document](#)

TalentEvolution Support
If you experience any issues or questions, please do not hesitate to contact us at: support@tnevolution.com.

My TalentEvolution
[My Details](#)
Manage your account login
[My Portfolio](#)
Manage your documents, appraisals, and questionnaires
[My Team \(Direct Reports\)](#)
Manage/view your direct reports

Copyright © 2004-2015, Talent Management Evolution, Inc. All rights reserved. Build: V5.4.3-mt-chanson 24-Jan-2015 10:33

- 2) In the navigation panel on the left, click on the 'Performance Review' To-Do List or via the link on the 'Home' page upon entering the application.

Logged In: TME Administrator [Logout](#)

TalentEvolution™

Menu: [Administration](#) [Home](#) [Analytics](#) [Organization](#) [Performance Management](#) [Talent Identifier](#) [Succession Builder](#)

Account Info

[My Account](#)

To-Do Lists

[Appraisals \(2 \)](#)

[Questionnaires \(0 \)](#)

Performance & Talent Management

The Talent Management system provides a global process that ensures we are assessing and identifying top talent across the organisation. Performance and Talent Management (P&TM) continues to be a priority for our business as we move from transformation to growth.

Within the organisation this enables us to:


- Differentiate people based on their performance and their potential tracked over time
- Identify talent earlier in careers enabling us to develop a diverse talent pool
- Obtain a common benchmark across the organisation to identify talent leading to more opportunities
- Provide tailored and actionable development plans to meet the organisation's criteria for optimal performance

Talent management is a core part of the business cycle

Whilst we clearly acknowledge that the fundamental aspect of P&TM is about having conversations with individuals, discussing their performance and formulating their development plans - this on-line system enhances this process, providing us with:

- A clear understanding of talent challenges and actions needed to address them
- Visibility on key managers outside their own department - get to know the best managers
- Well informed management planning decisions - right person in right position - with confidence
- Calibrated list of high potentials and special initiatives to develop them
- Divisional level reporting, providing you with the ability to access updated information on your key leadership community.
- The ability to review progress on the quality of our information

If you have any questions or thoughts on how this application could be improved please let us know



Regards
George Walters
Chief Executive

Copyright © 2004-2013, Talent Management Evolution, Inc. All rights reserved. Build: V3.4.3 dhanon 04-May-2013 00:02

The Performance Review Form

- 1) In the 'Performance Review' To-Do List, there is a list of review forms to be completed. Click the "Answer" button of the form to be answered.

[Appraisals](#)

Appraisals

One item found.

Name	Appraisal Role	Evaluatee	Due Date	Answer
Appraisal	Manager	Andrew Wiles		Answer

- 2) Fill out the form with the desired responses.

[Appraisals](#) | Appraisal - Andrew Wiles

Questionnaire is updated automatically as you type/modify the details

Questionnaire: Appraisal - Andrew Wiles

Questionnaire for: Andrew Wiles

Performance/Self-Review

Discussion Point

1. Provide an overview of your role, e.g., responsibilities, accounts, projects :

Comments

Discussion Point

2. What went well? What accomplishments or work are you most proud of? :

Comments

Discussion Point

3. What could have been improved? :

What didn't go well? Why? :

What can/are you doing to change that? :

Discussion Point

4. How have you "made a mark"? :

Comments

Discussion Point

5. What have you learned this year relative to: The industry, My craft, Digital/social, Behavior, Attitude, Skill? :

Comments

Discussion Point

6. What do you feel are your key strengths (1-3)? :

Comments

Discussion Point

7. Consider objectives for the next 6-12 months :

What are your career/development goals or training objectives for the year? :

What types of training, experiences or development opportunities would be helpful to achieve those objectives? :

Done

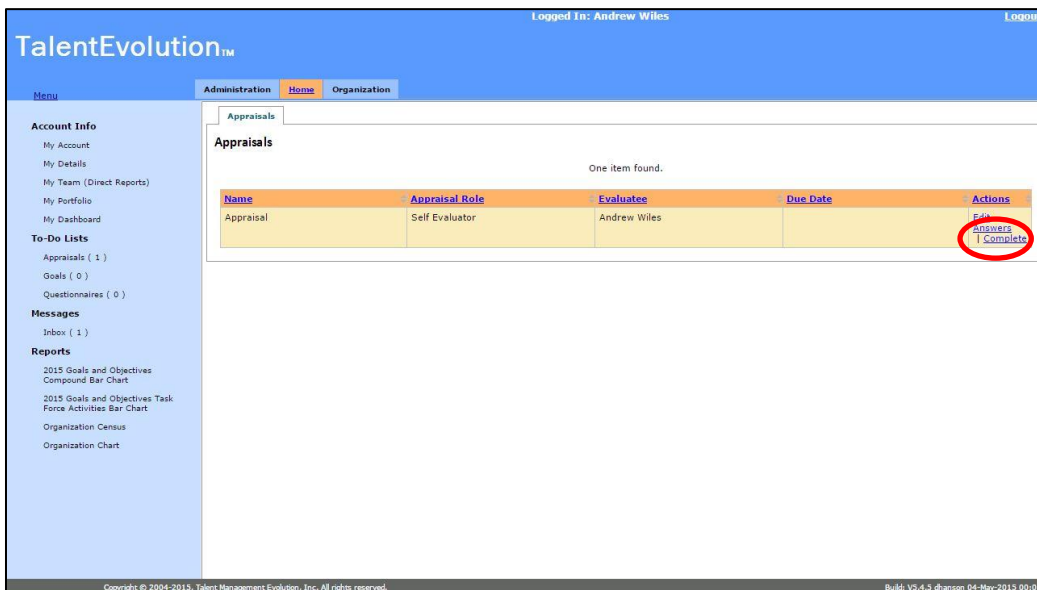
Talent Management Evolution, Inc. All rights reserved. Build: V3.4.3 dhanon 04-May-2013 00:02

- 3) When finished, click "Done" at the bottom.

- 4) A read-only view of the form will display on the screen. If you want to make a change, click the “Edit” button at the top of the page. If you are satisfied with the form or you would like to complete it later, click on the “Close” button at the top. This will bring you back to the list of Performance Reviews to be completed.



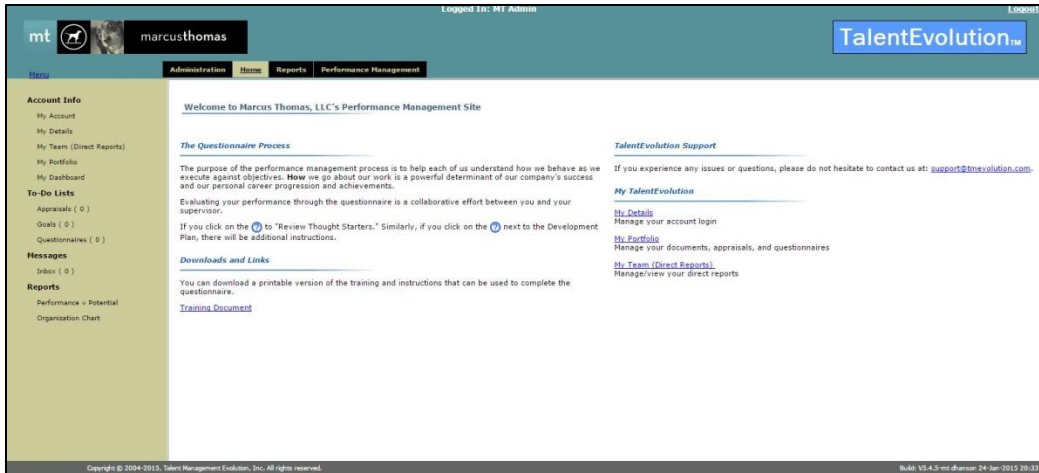
- 5) Once the form looks as desired and the “Close” button has been selected, the form will close and return to the Appraisal List view. Click on the “Complete” link at the right of the form to submit the form.
- a. Note: Once “Complete” has been selected, you can no longer edit the review form.



- 6) The form has been submitted and the self-evaluation is complete.
- a. Notify your supervisor upon completion of your form.

Viewing Submitted Forms

- 1) Once the Performance Review form has been submitted, it can be viewed by clicking the ‘My Portfolio’ link on the left-hand navigation panel or by the link on the home page.



2) Under the area labeled “Completed Performance Review,” there will be a list of review forms that have been completed and submitted. Click “View” of the form you wish to see.

- Once your manager has completed his/her form for you, it will also be found here as well.
- Any forms completed by a non-manager evaluator will not be displayed (i.e. peer reviews).
- Notify your supervisor upon completion of your form.

The Individual Contributor (IC) Level Development Plan / MAM Statement of Intent Process

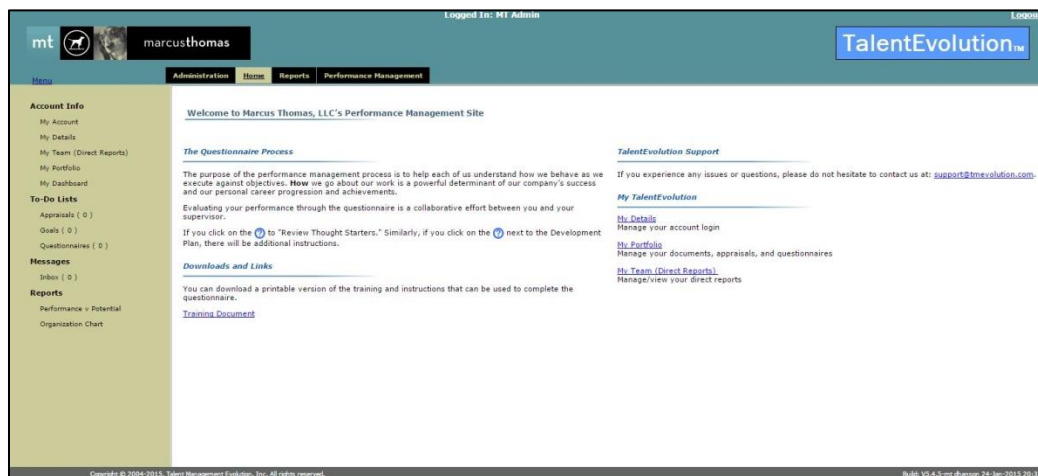
How to Login and Find the Forms*

- 1) Login using your username and password at <https://www.tmelogin.com/marcusthomas>.
Usernames are case-sensitive!
 - a. Upon your first visit, you will be required to change your password. Please create a password that is between 8 and 25 characters. You can use numbers, letters and special characters. You will not be able to reuse the last five passwords you have used in the past.

By logging on I agree that I have read and understood the above.

Username :	<input type="text"/>
Password :	<input type="password"/>
<input type="button" value="Login"/>	
Forgotten Password?	

- b. Below is a screenshot of your Home page.



- 2) In the navigation panel on the left, click on 'My Portfolio' or via the link on the 'Home' page upon entering the application.

* Note: The screenshots used within the training manual may look different because of specific client environment layouts. The content and processes will be consistent with your platform.

Menu

Account Info

[My Account](#)
[My Details](#)
[My Team \(Direct Reports\)](#)
[My Portfolio](#)
[My Dashboard](#)

To-Do Lists

[Appraisals \(0 \)](#)
[Goals \(0 \)](#)
[Questionnaires \(0 \)](#)

Messages

[Inbox \(1 \)](#)

Reports

[2014 Goal Setting Weight - CrossTab](#)
[2014 Goals and Objectives - Tabular](#)
[2014 Goals and Objectives Bar Chart](#)
[2014 Goals and Objectives Compound Bar Chart](#)
[2014 Goals and Objectives Task Force Activities Bar Chart](#)
[Organization Chart](#)

- 3) In the ‘Development Plan / MAM Statements’ area, a list of forms to be completed are held. Click the “Edit” button of the form to be answered.

TalentEvolution™

Logout Andrew Willes

Menu

Account Info

[My Account](#)
[My Details](#)
[My Team \(Direct Reports\)](#)
[My Portfolio](#)
[My Dashboard](#)

To-Do Lists

[Appraisals \(0 \)](#)
[Goals \(0 \)](#)
[Questionnaires \(0 \)](#)

Messages

[Inbox \(0 \)](#)

Reports

[2014 Goal Setting Weight - CrossTab](#)
[2014 Goals and Objectives - Tabular](#)
[2014 Goals and Objectives Bar Chart](#)
[2014 Goals and Objectives Compound Bar Chart](#)
[2014 Goals and Objectives Task Force Activities Bar Chart](#)
[Organization Chart](#)

My Executive Summary Andrew Willes

First Name :

Andrew

Telephone :

-

Last Name :

Willes

Email Address :

awilles@timevolution.com

Job Title :

Manager

Documents

[Add Item](#)
[Document Search](#)

Nothing found to display.

1 Items

Total of 0 Portfolio Items

Completed Appraisals

Nothing found to display.

Questionnaires

Goals and Objectives (3) Items

1 Items

Total of 0 Portfolio Items

Name	Status	Date Completed	Actions
Goals and Objectives 2014	In Progress		View Edit
Goals and Objectives 2014 - Individual Contributor	Not Started		View Edit
Goals and Objectives 2014 - Manager	Not Started		View Edit

- a. Both the Development Plan and Make a Mark Statement of Intent forms are found here.

The Development Plan

- 1) In the Development Plan form, fill in the textboxes with the desired information.

Development Plan
As applicable, review this form prior to your conversation with your supervisor. Prepare to discuss you development, goals and/or training ideas within this framework. The plan will be completed collaboratively between the two of you.

Development, Goals and/or Training Area(s)	Measurement (Desired Outcomes)	Process (How Will This Happen?)	Facilitator	Timing	Notes

Add

Send Email Notification : ☐
Send to manager for review : ☐
Send
Close

- 2) If there are multiple Developmental or Training Goals, an “Add” button is located under the row. Click “Add” to add another row.

Development Plan
As applicable, review this form prior to your conversation with your supervisor. Prepare to discuss you development, goals and/or training ideas within this framework. The plan will be completed collaboratively between the two of you.

Development, Goals and/or Training Area(s)	Measurement (Desired Outcomes)	Process (How Will This Happen?)	Facilitator	Timing	Notes

Add

Send Email Notification : ☐
Send to manager for review : ☐
Send
Close

- 3) A new row will appear, allowing another ‘Development, Goals and/or Training Area(s),’ ‘Measurement,’ ‘Process,’ ‘Facilitator,’ ‘Timing,’ and ‘Notes’ areas to be entered in.

Development Plan
As applicable, review this form prior to your conversation with your supervisor. Prepare to discuss you development, goals and/or training ideas within this framework. The plan will be completed collaboratively between the two of you.

Development, Goals and/or Training Area(s)	Measurement (Desired Outcomes)	Process (How Will This Happen?)	Facilitator	Timing	Notes

Add

Send Email Notification : ☐
Send to manager for review : ☐
Send
Close

- 4) If an additional row was added by accident, clicking on the “Delete” button at the end of the row will delete the corresponding field row.

Development Plan
As applicable, review this form prior to your conversation with your supervisor. Prepare to discuss you development, goals and/or training ideas within this framework. The plan will be completed collaboratively between the two of you.

Development, Goals and/or Training Area(s)	Measurement (Desired Outcomes)	Process (How Will This Happen?)	Facilitator	Timing	Notes

Add

Send Email Notification : ☐
Send to manager for review : ☐
Send
Close

- 5) Continue this process for every goal and training desired.
- 6) When all desired fields are filled in, check the “Send Email Notification” and “Send to manager for review” checkboxes and click on the “Send” button to complete the form and forward it on to the supervisor.

Send Email Notification :	<input checked="" type="checkbox"/>
Send to manager for review :	<input checked="" type="checkbox"/>
<input type="button" value="Send"/>	
<input type="button" value="Close"/>	

- a. A notification verifying the email was sent will appear on the bottom of the form

Send Email Notification :	<input type="checkbox"/>
Send to manager for review :	<input type="checkbox"/>
<input type="button" value="Send"/>	
Information successfully sent	
<input type="button" value="Close"/>	

- b. If the checkboxes are not checked and the form is not sent, the supervisor is not notified and will not know to complete the process!

- 7) Click the “Close” button to close the editing process of the form.
- 8) From here, a PDF version of the report can be downloaded by clicking on the “Export PDF” button at the top of the page. Editing can continue by clicking on the “Edit” button or pressing the “Back” button will return to the ‘My Portfolio’ screen. If more forms are to be completed, the navigational buttons at the top or the drop-down menu will go to the next form.

Home	
<input type="button" value=" <"/> <input type="button" value="<"/> 2 of 3 <input type="button" value=">"/> <input type="button" value="> "/> Goals and Objectives 2014 - Individual Contributor ▼	
Back Edit Export PDF	
Questionnaire: Goals and Objectives 2014 - Individual Contributor	

- 9) Once all forms have been completed and the “Send” button has been clicked, the process is sent on to the supervisor for review.

Make a Mark Statement of Intent

- 1) In the Make a Mark Statement of Intent form, fill in the ‘Staff Member Comments’ field with the desired information.

Make a Mark Statement of Intent
Write 1-2 sentences that capture how you will bring "make a mark" to life over the next year.

Staff Member Comments	Supervisor Comments
<input type="text"/>	<input type="text"/>

- 2) If additional comment fields are desired, click on the “Add” button at the bottom of the row.

Make a Mark Statement of Intent
Write 1-2 sentences that capture how you will bring "make a mark" to life over the next year.

Staff Member Comments	Supervisor Comments
<input type="text"/>	<input type="text"/>

- 3) A new row will appear, allowing a new comment to be entered.

Make a Mark Statement of Intent
Write 1-2 sentences that capture how you will bring "make a mark" to life over the next year.

Staff Member Comments	Supervisor Comments
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

- 4) If an additional row was added by accident, clicking on the “Delete” button at the end of the row will delete the corresponding field row.

Make a Mark Statement of Intent
Write 1-2 sentences that capture how you will bring "make a mark" to life over the next year.

Staff Member Comments	Supervisor Comments
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

- 5) Continue this process for every comment field desired.
- 6) When all desired fields are filled in, check the “Send Email Notification” and “Send to manager for review” checkboxes and click on the “Send” button to complete the form and forward it on to the supervisor.

Send Email Notification : ☒

Send to manager for review : ☒

- a. A notification verifying the email was sent will appear on the bottom of the form

Send Email Notification :	<input type="checkbox"/>
Send to manager for review :	<input type="checkbox"/>
	<input type="button" value="Send"/>
Information successfully sent	
<input type="button" value="Close"/>	

- b. If the checkboxes are not checked and the form is not sent, the supervisor is not notified and will not know to complete the process!
- 7) Click the “Close” button to close the editing process of the form.
 - 8) From here, a PDF version of the report can be downloaded by clicking on the “Export PDF” button at the top of the page. Editing can continue by clicking on the “Edit” button or pressing the “Back” button will return to the ‘My Portfolio’ screen. If more forms are to be completed, the navigational buttons at the top or the drop-down menu will go to the next form.

Home	
<input type="button" value=" <"/> <input type="button" value="<"/> 2 of 3 <input type="button" value=">"/> <input type="button" value="> "/>	Goals and Objectives 2014 - Individual Contributor ▼
Back Edit Export PDF	
Questionnaire: Goals and Objectives 2014 - Individual Contributor	

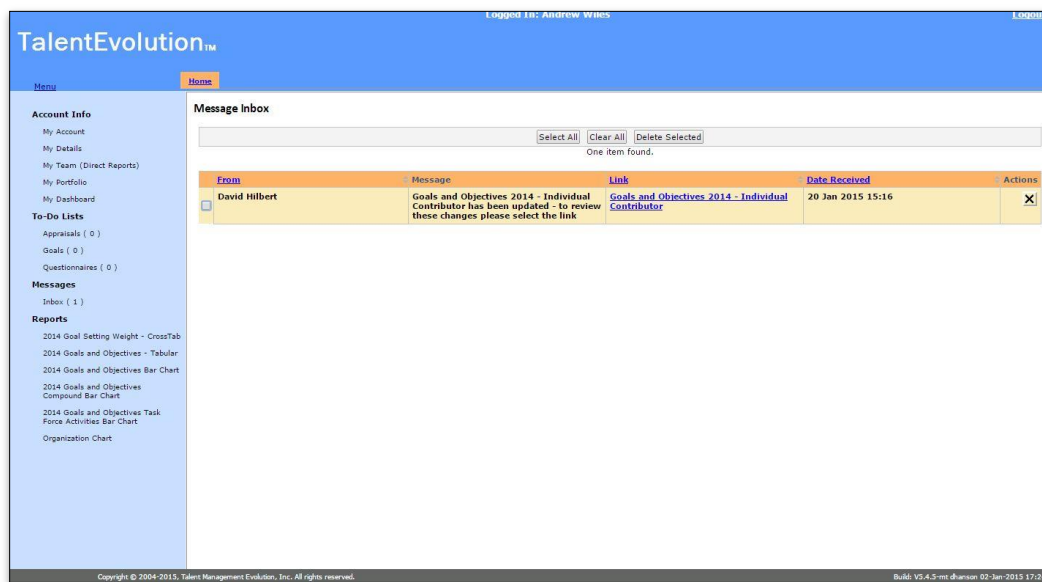
- 9) Once all forms have been completed and the “Send” button has been clicked, the process is sent on to the supervisor for review.

Follow-up Process

- 1) Once the supervisor has attended to the form and the form is sent back to the individual for review, the form can be found in the individual’s inbox on the ‘Home’ tab.



- 2) The individual can access the supervisor-completed form by clicking on the link provided in the 'Inbox.'



- 3) Or the individual will also receive an email notification telling him/her that the form is ready for review
- a. A link is provided within the email to access the form as well

- 4) The individual and the manager continue sending the form back-and-forth until both parties agree on the form and are satisfied with its contents.
- 5) The individual is then done with the process. The form will remain in 'My Portfolio' for each individual until the form has been 'Archived.'

Editing the Forms

Individual Initiated Change

If, during the year, a goal, objective, or Make a Mark comment needs to be updated, the individual can add an addendum to the form.

- 1) In 'My Portfolio,' the individual can select the form that requires updating and click on "Edit."

Name	Status	Date Completed	Actions
Goals and Objectives 2014	In Progress		View Edit
Goals and Objectives 2014 - Individual Contributor	Not Started		View Edit
Goals and Objectives 2014 - Manager	Not Started		View Edit

- 2) Under the goal or objective being modified, click on the "Add" button within that group.

- 3) A new line will appear and can be filled out, noting the reason(s) for the change in the 'Comments' section.

- 4) Check the "Send Email Notification" and "Send to manager for review" checkboxes and click on the "Send" button to complete the form and forward it on to the supervisor.
 - a. A notification verifying the email was sent will appear on the bottom of the form

Send Email Notification :	<input checked="" type="checkbox"/>
Send to manager for review :	<input checked="" type="checkbox"/>
<input type="button" value="Send"/>	
<input type="button" value="Close"/>	

Send Email Notification :	<input type="checkbox"/>
Send to manager for review :	<input type="checkbox"/>
<input type="button" value="Send"/>	
Information successfully sent	
<input type="button" value="Close"/>	

- b. If the checkboxes are not checked and are not sent, the supervisor is not notified and will not know to complete the process!
- 5) Click the “Close” button to close the editing process of the form.
- 6) The supervisor will be able to review the changes and approve, as in the [Follow-Up Process](#) explained previously.

Supervisor Initiated Change

The supervisor can also initiate a change / update to the form. The individual will be notified by email and a link to the form will be provided. Additionally, the individual can access the updated form via his/her ‘Inbox’ on the ‘Home’ tab (see [Follow-Up Process](#) for step-by-step instructions on how to check the ‘Inbox’).