

PERFORMANCE EVALUATION PROGRAM FY 2019-20



The Annual Appraisal process in a glimpse

- 1. Once the KRA setting window is open, you can add/upload your KRAs and send it to your appraiser for approval. Once submitted you can not edit/delete the goals, unless it is reassigned to you
- 2. Your Goals can be assigned to a **Single Appraiser (Manager)** or **Multiple Appraisers (Managers)** depending on your role
- 3. Managers can **edit** and **approve goals** if they want to make any changes
- 4. Once goals have been approved, you can do a **Self Rating** on your **Performance** on a scale of **1 to 5** and assess your alignment with the organisation **Values** on a scale of **1 to 5**
- 5. KRAs will have a 90 percent weightage and Values will have a 10 percent weightage
- 6. Once you have completed your **Self Rating**, it moves to the **Appraiser(s) for their Rating** and then to the **Reviewer for the Final Assessment and Rating**.

Types of Appraisal Workflows

- ❖ Band 1 Appraisal Process: KRAs are uploaded in the system by the People Officers and the appraisal process begins with the approval from the appraiser. No Self-Rating in case of band 1 individuals and rating for KRAs is on a scale of 1 to 3.
- ❖ Band 2 Appraisal Process: The appraisal process begins with the goal setting by the individual. They will do their Self-Rating post KRA approval by the appraiser. Rating for KRAs is on a scale of 1 to 5.

In addition, there are different workflows based on the individual's reporting matrix, viz. single appraiser, multiple appraisers and same appraiser and reviewer.

- Single Appraiser all Bands: When all your goals are aligned to one manager and he/she is the one who will do the complete assessment.
- Multiple Appraisers all Bands: When all goals are assigned to one manager but there are multiple managers who would rate you on all your goals.
- Same Appraiser and Reviewer all Bands: When the reporting manager is also the reviewer for the individual.
- Multiple Appraisers Holacracy Band 2 and above : When goals are divided between more than 1 appraisers and assigned to both appraisers according to the weightages.



1. Goal Setting (Band 2 & above)

Set Goals – People will be able to set their **Key Responsibility Areas** (KRAs) for the year and submit it for approval to the respective Appraiser(s).

Goal Name

- This is the Key Responsibility Area (KRA) of an individual.
- It is the broader goal that he/she takes up, which further breaks into deliverables.
- One Objective/Goal can have multiple Key Deliverables

Key Deliverables

 These are action points which need to be accomplished in order to achieve your objective.

Measurement Criteria

 This is a parameter that you define for your targets. Please select one out of the three formats.
Date – When a KRA needs to be

Date – When a KRA needs to be achieved within a particular date(dd-mon-yy)

Number – When a KRA target is a number. Eg. Increase the revenue by 1000 cr

Percentage – When a KRA can be defined by assigned percentage. Eg. Reduce the cost by 20 percent

Nature Of Performance

 Depending on whether 'higher is better' or 'lower is better' for your performance w.r.t. the criteria/ parameter against each deliverable

Target

- Fill the target decided against each Key Deliverable based on the Measurement Criteria selected. Eg.
- Date DD-MON-YY
- Number 12, 23, 120
- Percentage 20, 100,90



2. Approve Goals

- For People who have single Appraiser Appraiser will check the KRAs and approve them. If required, the Appraiser will be able to modify the KRAs post a discussion.
- For People who have more than one Appraisers Each Appraiser will check the specific KRAs that are mapped to them and approve. If required, the Appraisers will be able to modify the KRAs mapped to them post a discussion with the individual.



3. Measurement

Measuring Performance

- 1. For Band 2 and above, rating is on a 5 point scale by Self, Appraiser & Reviewer
- 2. For Band 1, rating is on a 3 point scale by— Appraiser & Reviewer

Performance would be measured against your goals/ KRAs

Measuring Values

1. 5 point rating scale for measurement of value alignment

Alignment is checked with **Future Group Values**





Measuring Performance for Band 2 and above – 5 point rating scale

1 Underperformer



Needs Improvement



Meets expectations



Exceeds Expectations



Inspirational

- 1. Performance was below expectations
- 2. No progress towards goals was made.

- 1. Performance did not meet expectations in one or more critical KRAs
- 2. Most of the critical goals were not met.

- 1. Performance met expectations in all essential KRAs and the quality of work overall was very good.
- 2. Critical annual goals were met.

- 1. Performance exceeded expectations in all essential areas of responsibility, and the quality of work overall was excellent.
- 2. All annual goals were met.

- 1. Performance exceeded expectations due to exceptionally high quality of work
- 2. Performance resulted in an exceptional or unique contribution in the format, function, department.

Measuring Performance for Band 1 – 3 point rating scale

Below Expectation



– Meets Expectation



Exceeds Expectation



Measuring Values – 5 point rating scale

The Value rating scale defines the likelihood of the value getting displayed at the workplace





Self-Rating (only for Band 2 & above)

- Individuals will rate their KRAs according to their performance on a 5 point rating scale and also mention their Achievement against each KRA. Post that, they will also give input on their alignment with the Values of the Group.
- After the ratings and inputs are submitted, KRAs will reflect in the respective Appraiser(s)' action items for their rating.



Appraiser Rating

- For People who have single Appraiser The Appraiser will Rate the team member's KRAs on a 5 point rating scale (Band 2 and above) or 3 point rating scale (Band 1), and mention their Achievement against each KRA. The Appraiser will also give input on the team member's alignment with the Values of the Group.
- For People who have more than one Appraiser The Primary Appraiser, Appraiser 2 and/or Appraiser 3 will Rate the specific KRAs that are mapped to them on a 5 point rating scale (Band 2 and above) or 3 point rating scale (Band 1), and also mention the team member's Achievement against each KRA. The Primary Appraiser will also give input on the team member's alignment with the Values of the Group.



- 4. Appraiser's Recommendation for Promotion, Salary Correction and Training
 - For People who have one Appraiser After the ratings are submitted by the Appraiser, the Appraiser will provide the Recommendation (if any) for Promotion, Salary Correction and Training.
 - For People who have more than one Appraiser After the ratings are submitted by all the Appraisers, the Primary Appraiser will be able to review it and provide the Recommendation (if any) for Promotion, Salary Correction and Training.



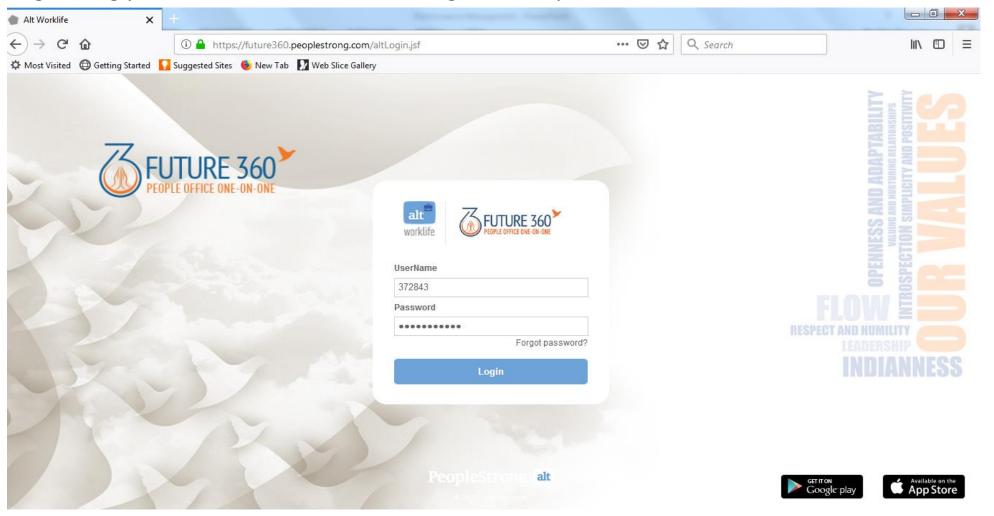
5. Reviewer's Final Rating and Recommendation

- For People who have one Appraiser The Reviewer will be able to review the ratings and recommendations by the Appraiser and provide the final rating and recommendation for the individual. The Reviewer will also give input on the team member's alignment with the Values of the Group.
- For People who have more than one Appraiser The Reviewer will be able to review the ratings and recommendations by all the Appraisers and provide the final rating and recommendation for the individual. The Reviewer will also give input on the team member's alignment with the Values of the Group.



Using Future 360 PEP

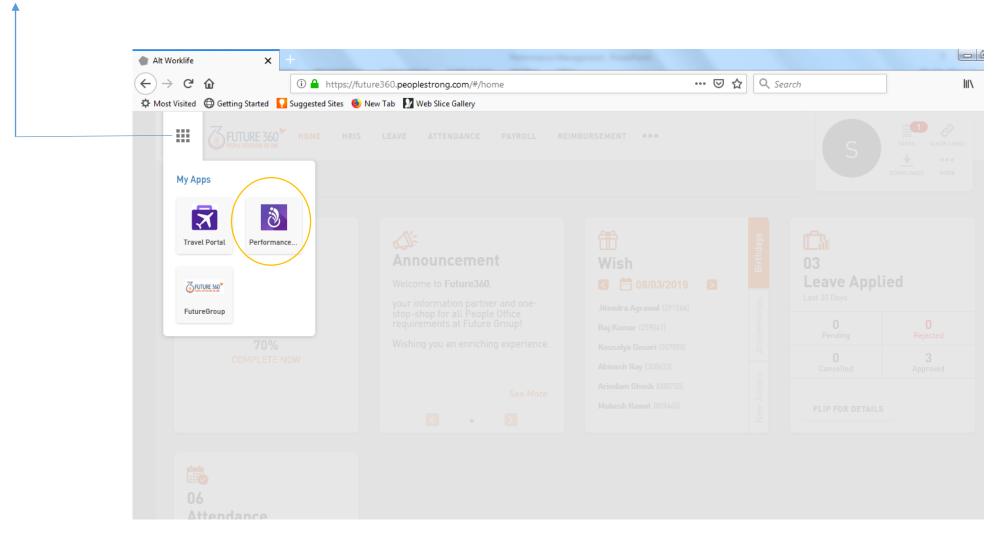
Login using your Future 360 Credentials to login to the system.





FG 360 PEP Login

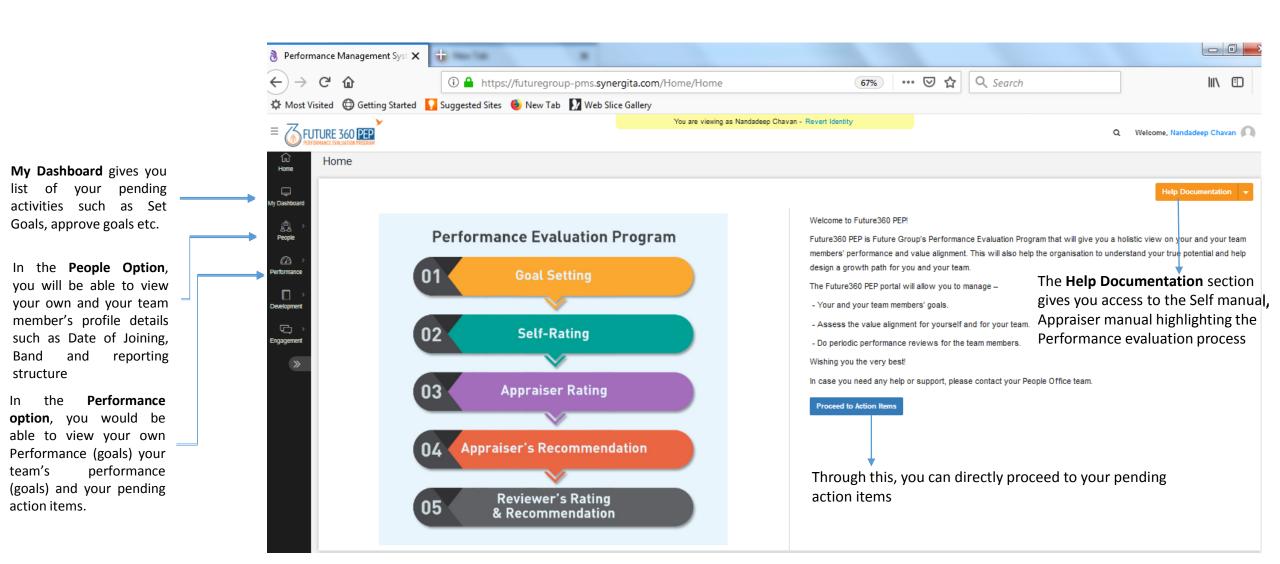
Once you login, click on the mesh icon on the top left hand corner of the screen and choose the performance option.





FG 360 PEP – Landing Page

The Landing page gives you an overview of the various elements of the Performance Evaluation Program at Future Group





Appraisal process and workflows-explained with screenshots

- Appraisal Process Band 1 KRAs are uploaded in the system by the People Officers and the appraisal process begins with the approval from the appraiser
- 2. <u>Appraisal Process Single Appraiser (Manager) Band 2 and above</u> When all your goals are aligned to one manager and he is the one who will do the complete assessment
- 3. <u>Appraisal Process Multiple Appraiser (Manager) Band 2 and above</u> Process where all goals are assigned to one manager but there are more than one managers who would rate you on all your goals
- 4. <u>Appraisal Process Holacracy Multiple Appraisers –Band 2 and above</u> Process where your goals are divided between more than 1 appraisers.
- 5. <u>Same Appraiser and Reviewer</u>

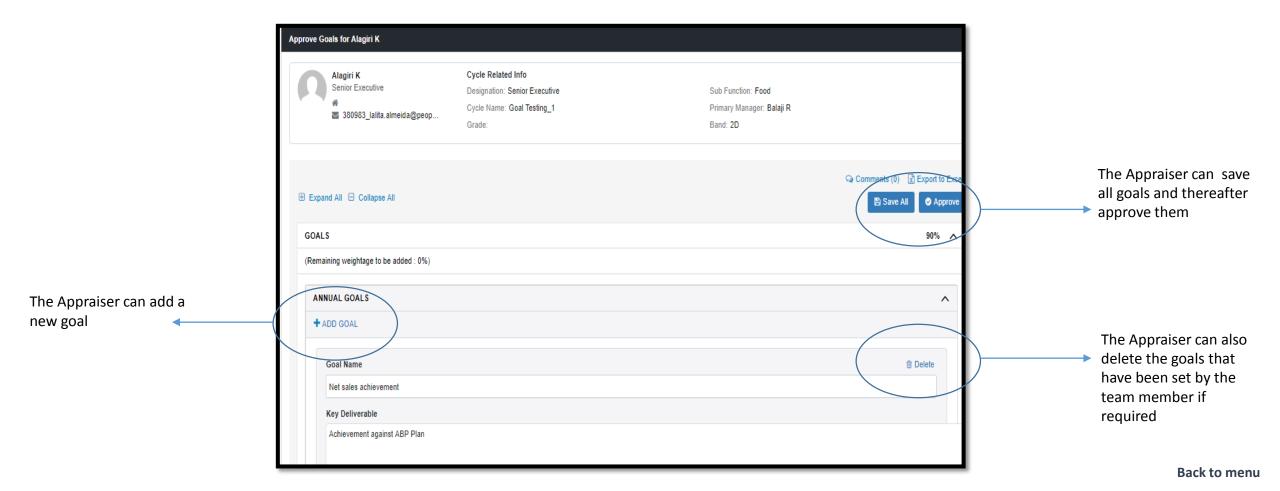


Appraisal Process for Band 1



Goal Approval

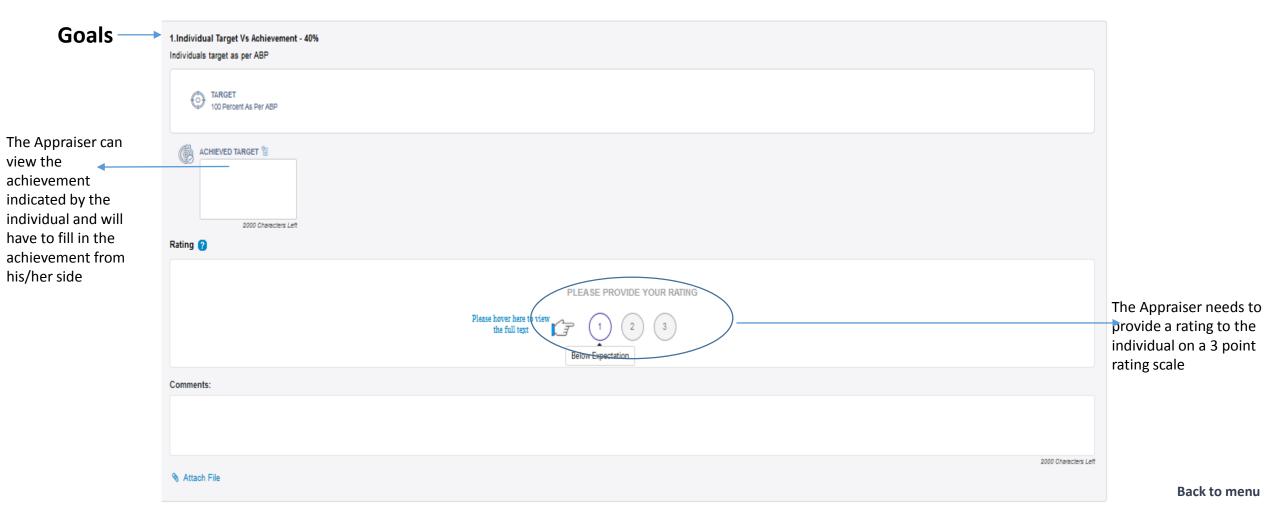
The Band 1 process directly begins at the Goal Approval Stage by the Appraiser. The Appraiser will be able to view pending action in the Dashboard and begin the process.





Appraiser Rating

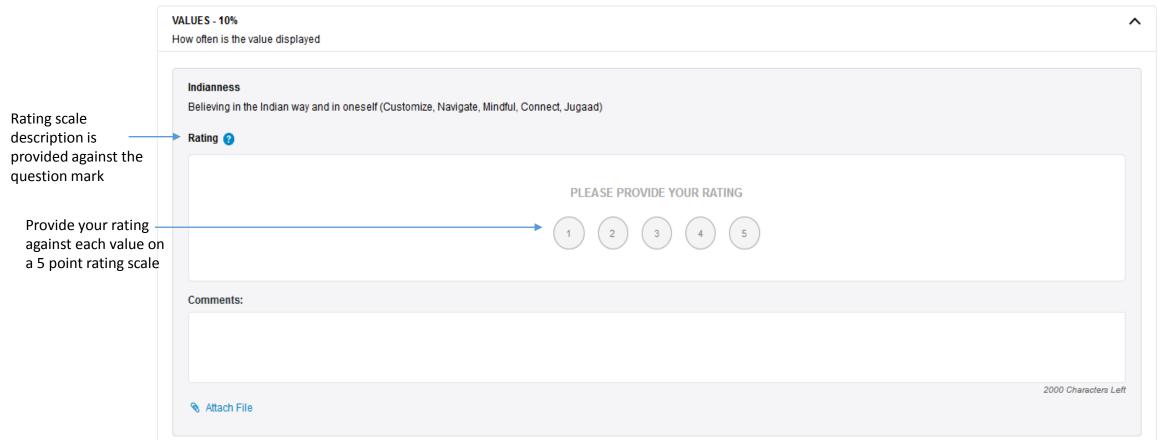
Once goals have been approved, the feedback now moves to all the Appraisers for his/her ratings and recommendation. The Appraisers also needs to input the Achievement and provide a rating against each goal on a 3 point rating scale.





Appraiser Rating

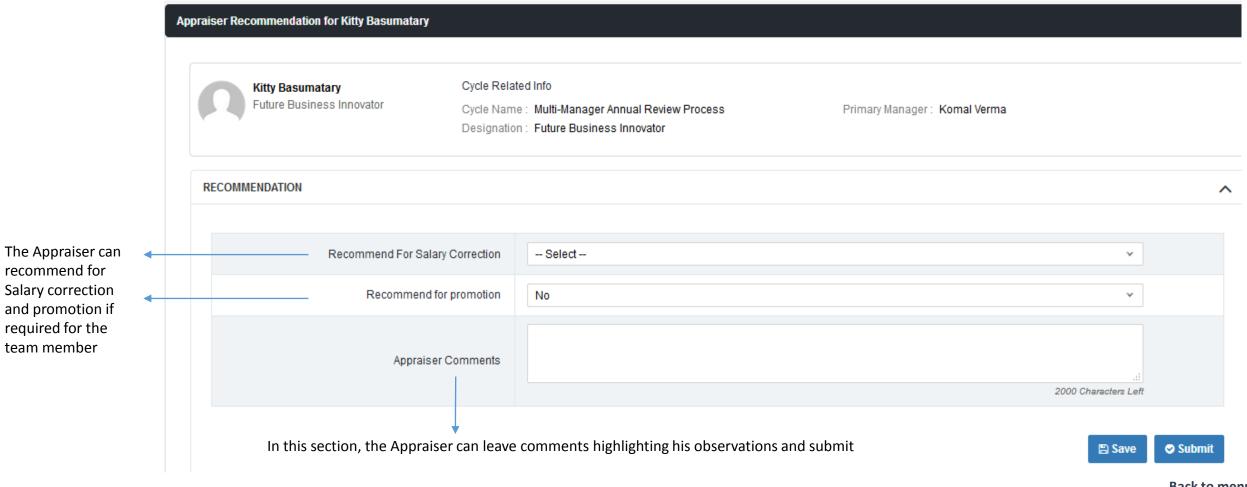
After rating the goals, the Appraiser also needs to rate the values





Appraiser Recommendation

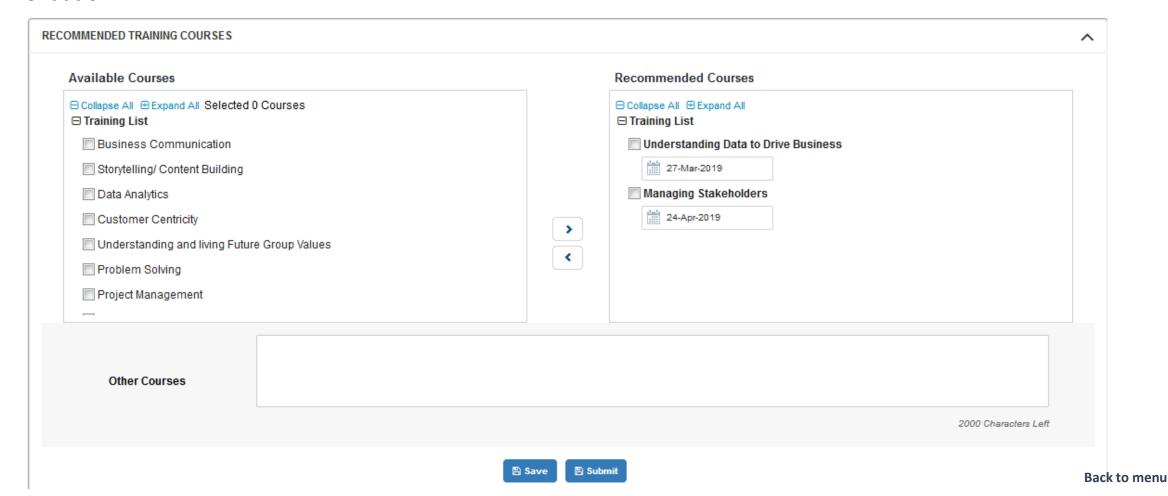
After rating the goals, the Primary Appraiser or Appraiser 1 needs to provide their recommendation for Salary Correction and Promotion, if any





Appraiser Training Recommendation

The Primary Appraiser or Appraiser 1 needs to recommend Training courses for the individual post the rating and the recommendation



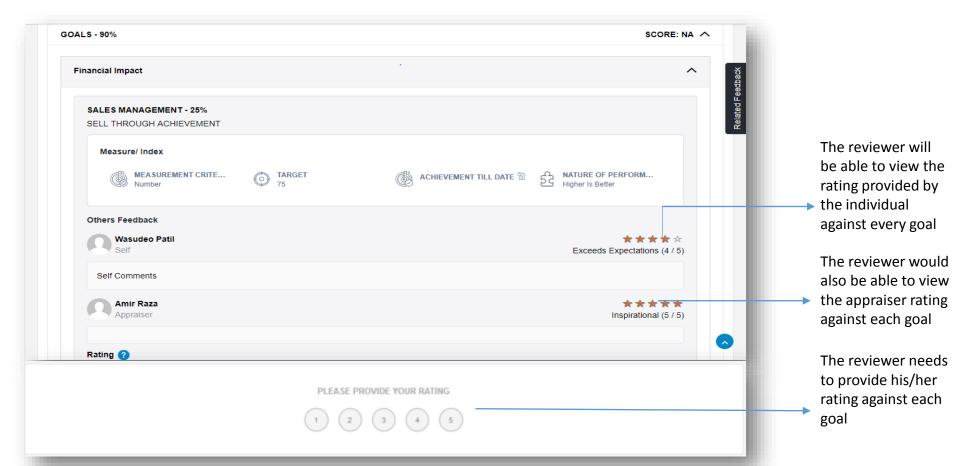


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Band 1 – Appraisal Process

Reviewer Rating

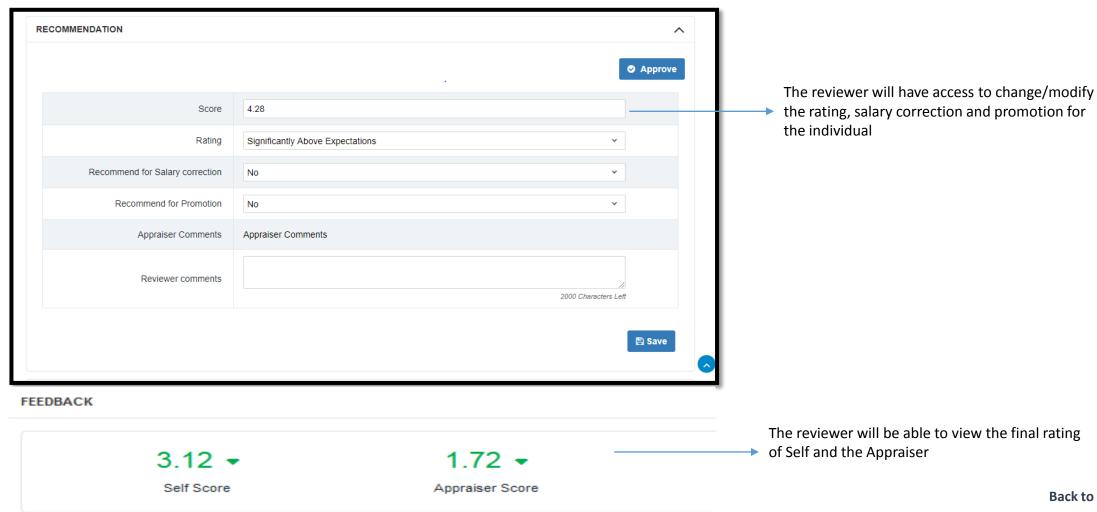
Once the ratings and recommendation have been submitted by the Primary Appraiser, the workflow will directly move to the reviewer for his final rating and recommendation on the goals and the values. The reviewer would be able to view the option in the **My pending Actions** on the dashboard.





Reviewer Recommendation

Once the ratings have been provided by the reviewer, the reviewer needs to provide his final rating and recommendation



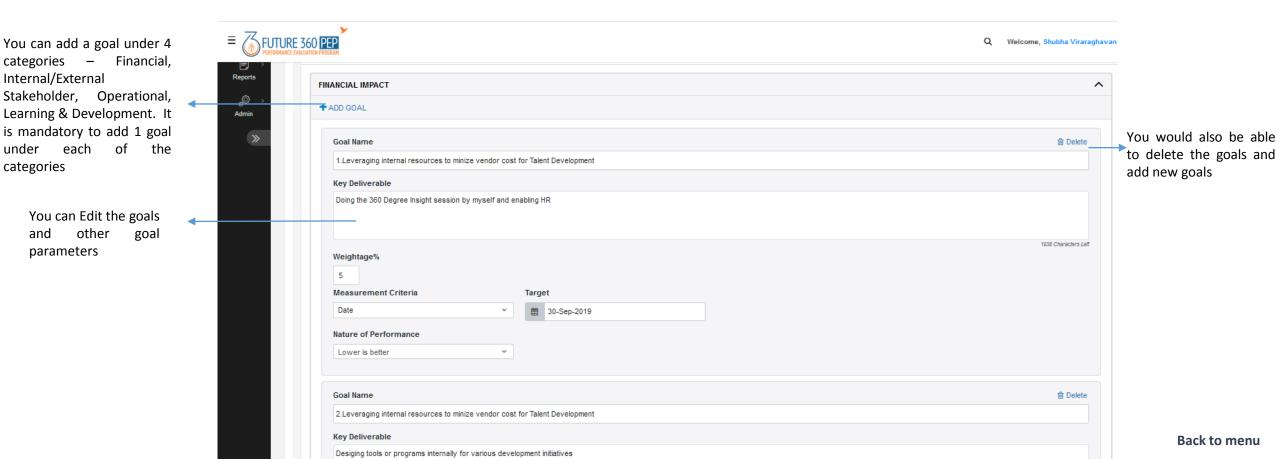
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Band 2 and above



Goal Setting – Single Appraiser

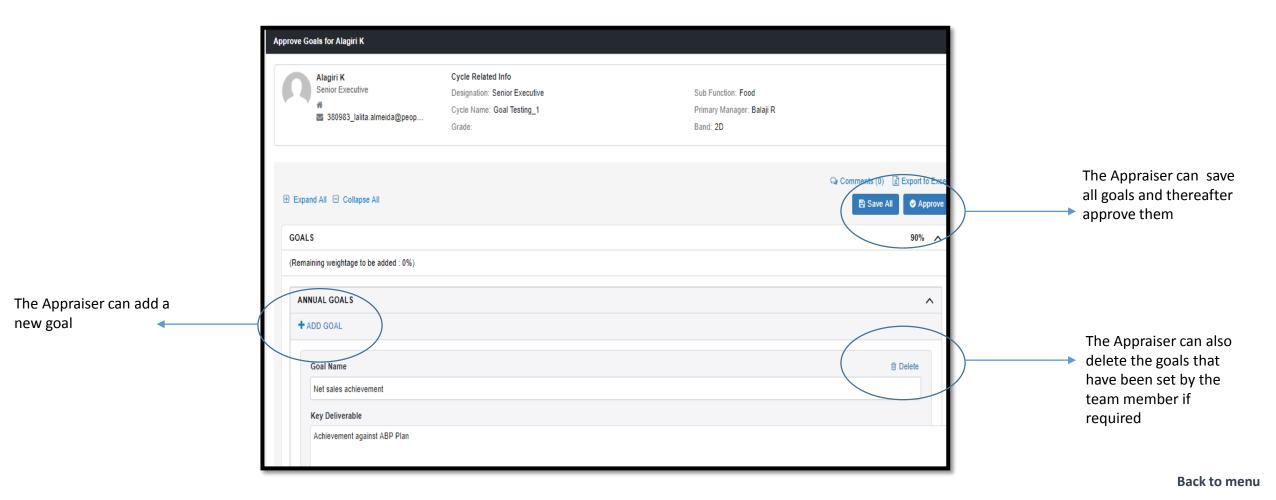
You can access the **Set Goals** page directly from **Proceed to Action Items** on the Landing page or can Click on **Performance** and then move to **My Action Items**. Once you click on the **Set Goals** option, you would be able to **add/edit/delete your goals**. You can then save and submit the goals to the Appraiser for approval.





Goal Approval – Single Appraiser

Once the team members have submitted their goals, the Appraiser would be able to view the Approve Goals option in the Dashboard under pending activities. The Appraiser can initiate, edit and delete, reassign weightages to goals.

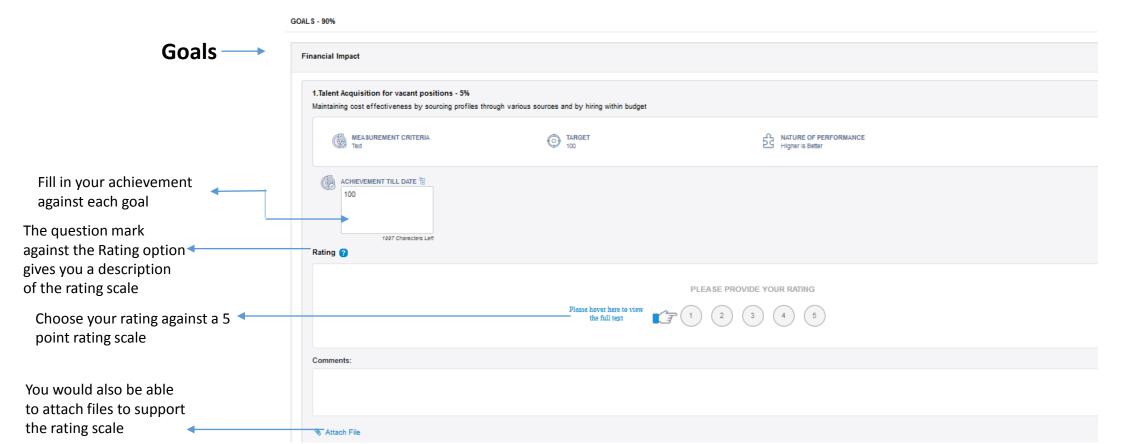




Self Rating - Goals

Once goals have been approved by the Manager, the process now moves to the Self Rating stage. You can access your Pending activities from your Dashboard and chose the Self Rating option.

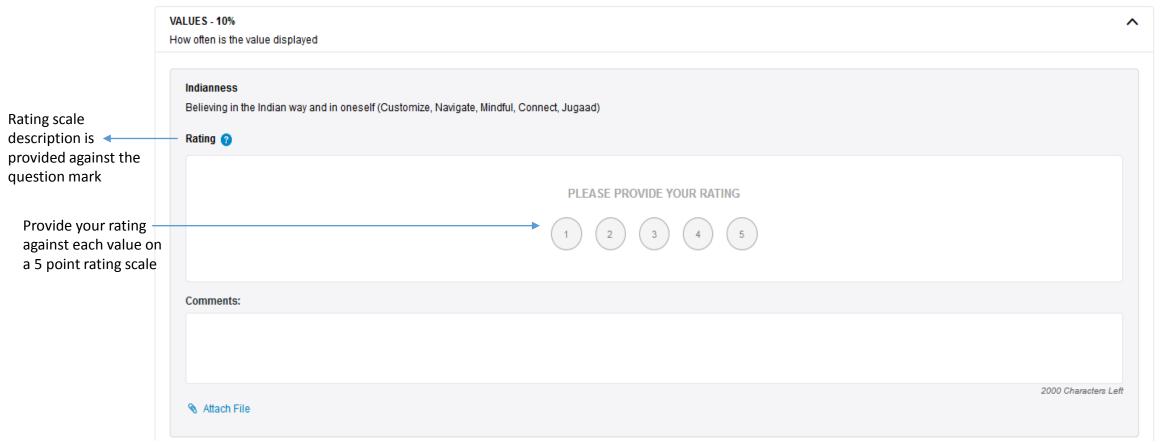
For Self-Rating, you need to enter your **Achievement** against each **Goal** and rate yourself on a **5 point rating scale**. Post this you would also need to rate your alignment with Future Group Values





Self Rating - Values

After rating the goals, you need to assess your alignment with the values of the organization

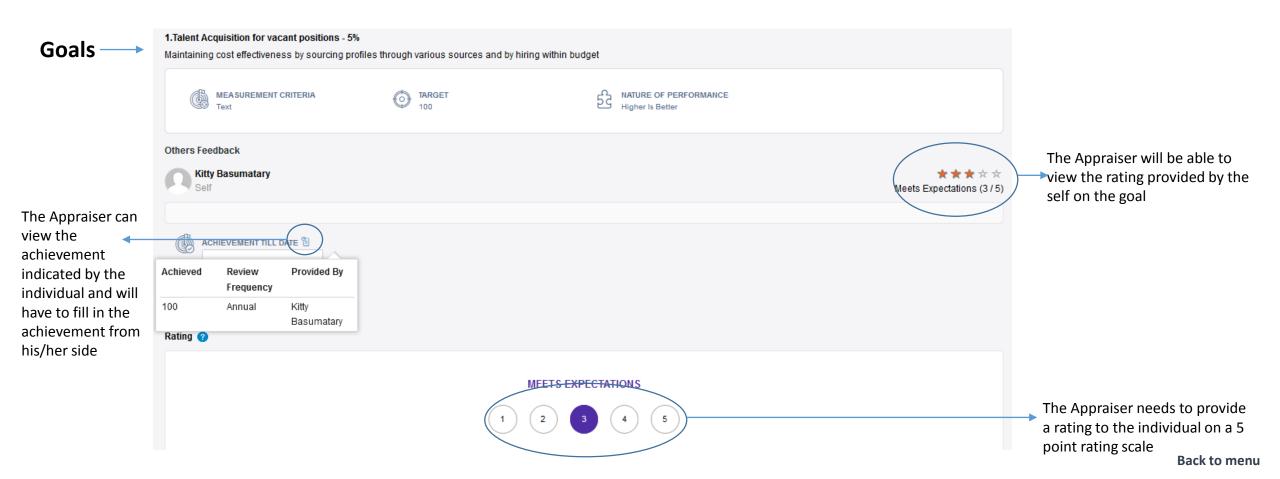


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Appraiser Rating – Single Appraiser

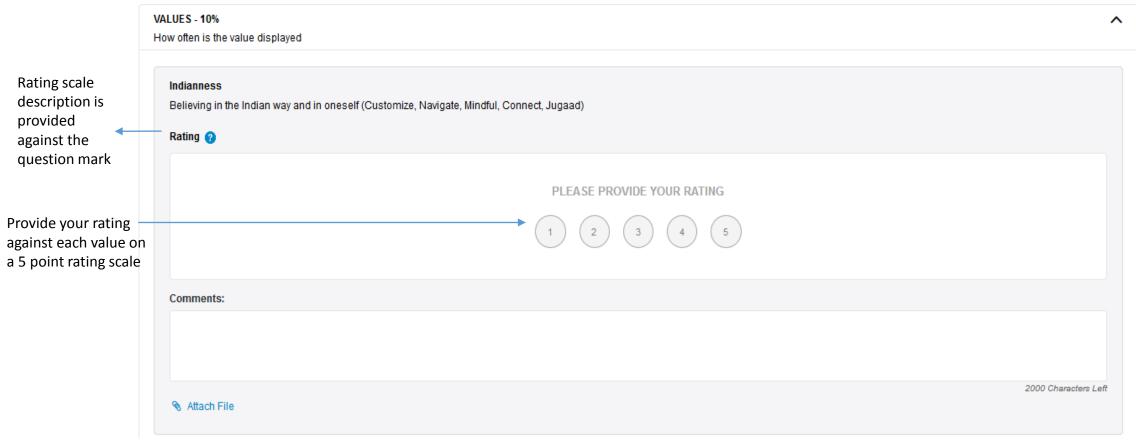
Once the ratings have been submitted by the individual, the feedback now moves to the Appraiser for his/her ratings and recommendation. The Appraiser also needs to input the Achievement and provide a rating against each goal on a 5 point rating scale.





Appraiser Rating – Single Appraiser

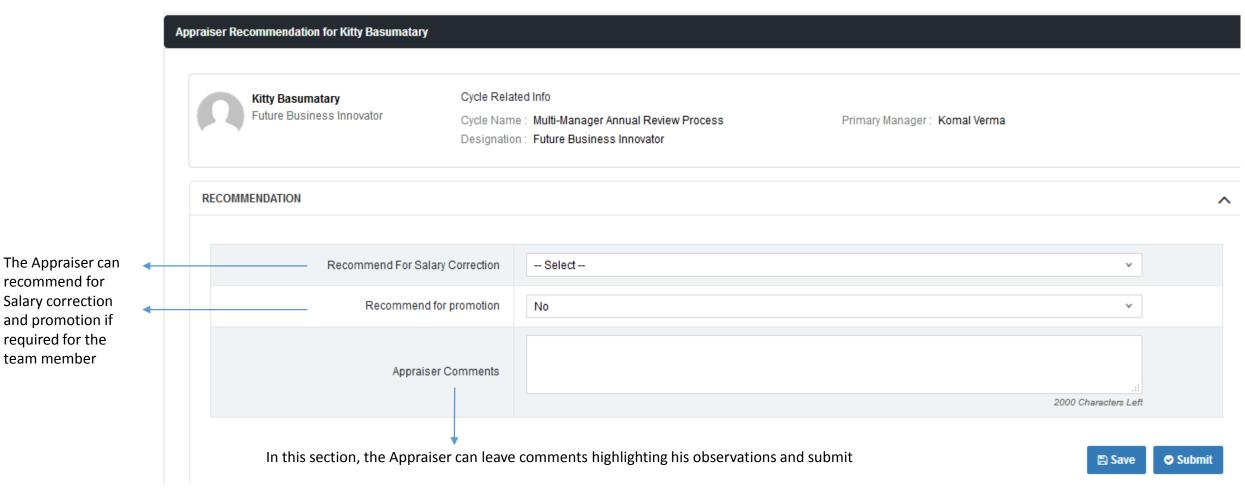
After rating the goals, the Appraiser also needs to rate the values



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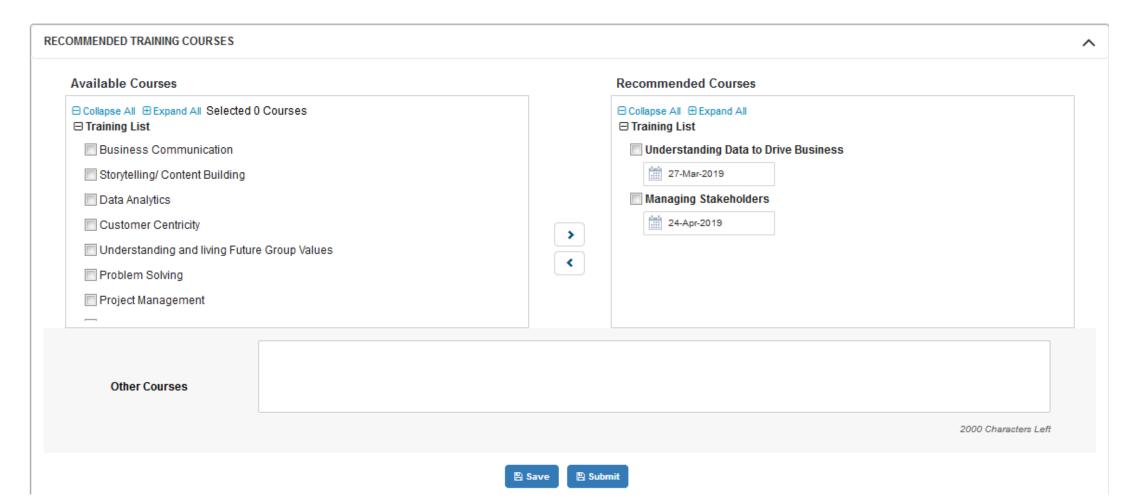
Appraiser Recommendation – Single Appraiser





Appraiser Training Recommendation – Single Appraiser

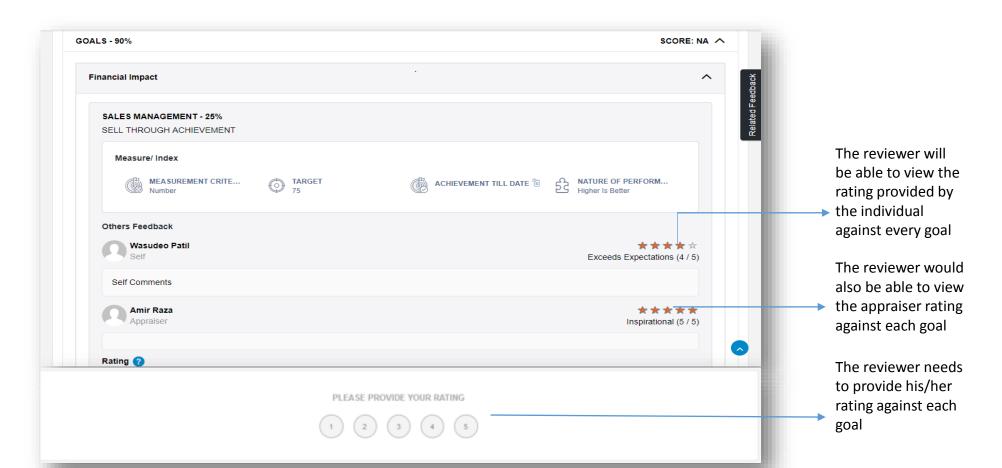
The Appraiser needs to recommend Training courses for the individual post the rating and the recommendation





Reviewer Rating

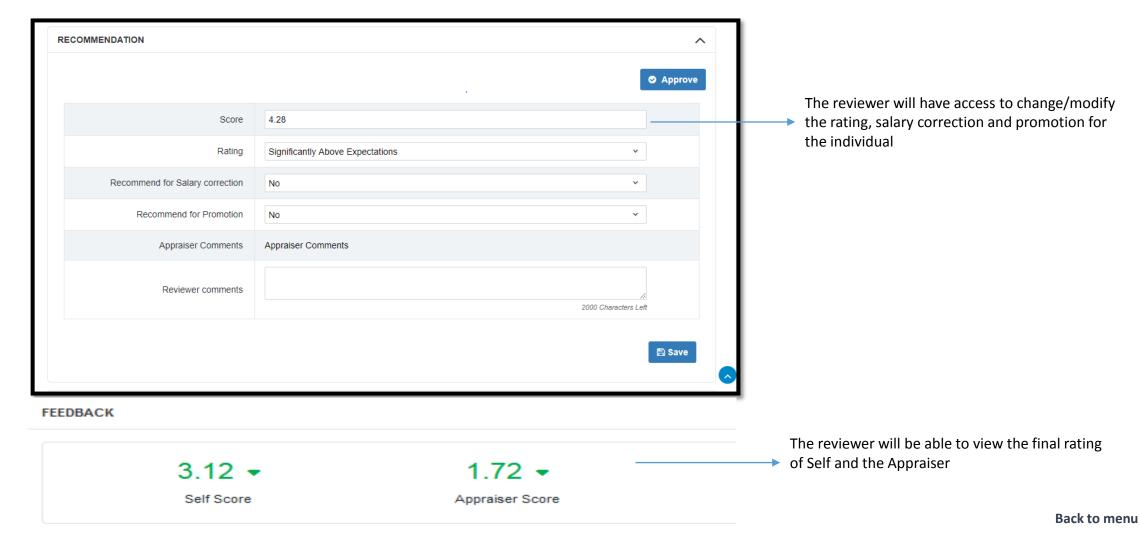
Once the ratings and recommendation have been submitted by the Appraiser, the workflow will move to the reviewer for his final rating and recommendation on the goals and the values. The reviewer would be able to view the option in the **My pending Actions** on the dashboard.





Reviewer Recommendation

Once the ratings have been provided by the reviewer, the reviewer needs to provide his final rating and recommendation



Appraisal Process – Multiple Appraisers (Managers) – Process where all goals are assigned to one appraiser but there are multiple appraisers who would rate you

Band 2 and above

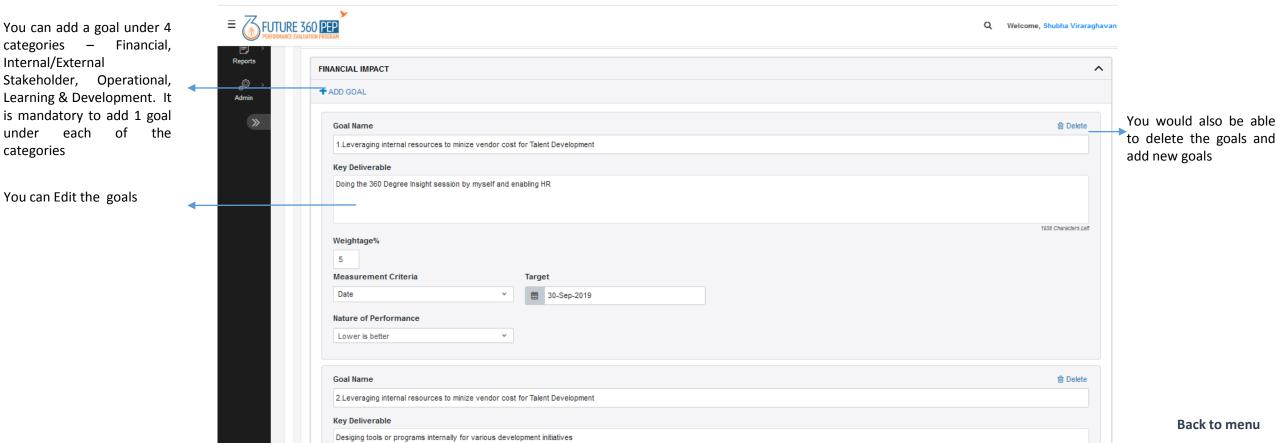


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Appraisal Process – Multiple Appraisers (Managers)

Goal Setting – Multiple Appraisers

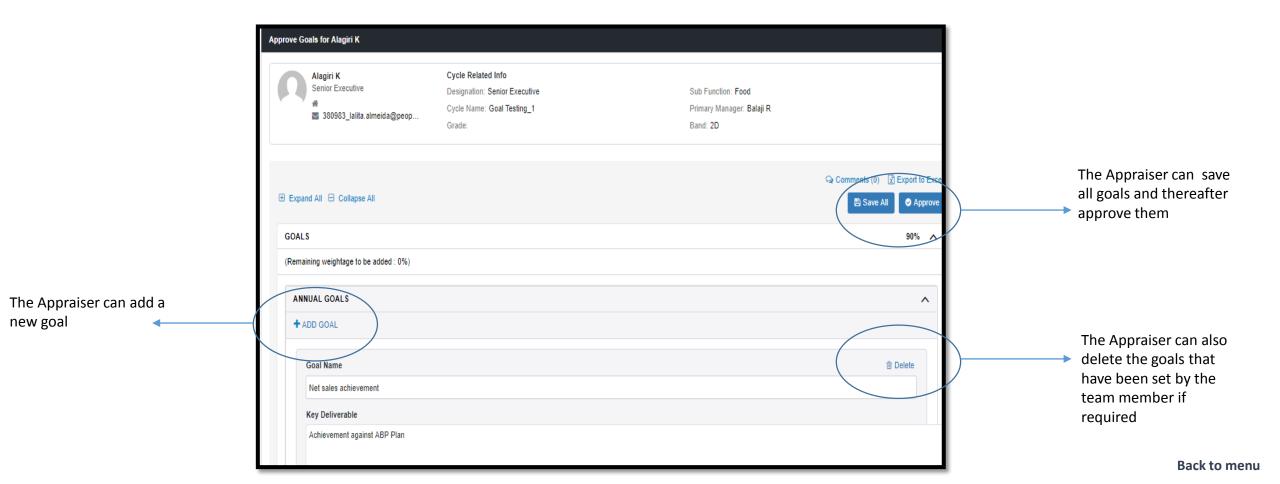
You can access the **Set Goals** page directly from **Proceed to Action Items** on the Landing page or can Click on **Performance** and then move to **My Action Items**. Once you click on the **Set Goals** option, you would be able to **add/** edit/delete your goals. You can then save and submit the goals to the Appraiser for approval.





Goal Approval – Multiple Appraisers (Managers)

Once the team members have submitted their goals, the Primary Appraiser would be able to view the Approve Goals option in the Dashboard under pending activities. The Primary Appraiser can initiate, edit and delete, reassign weightages to goals.

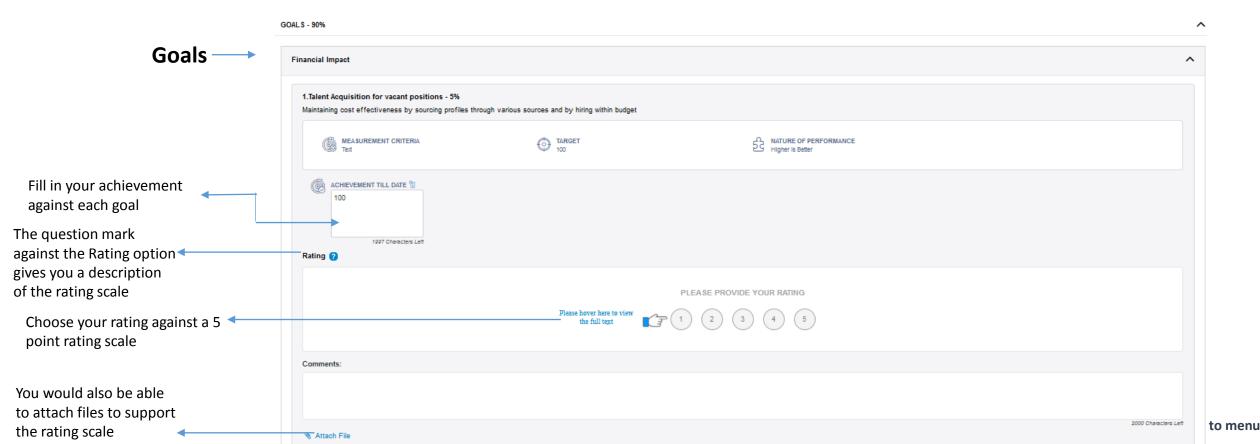




Self Rating - Goals

Once goals have been approved by the Manager, the process now moves to the Self Rating stage. You can access your Pending activities from your Dashboard and chose the Self Rating option.

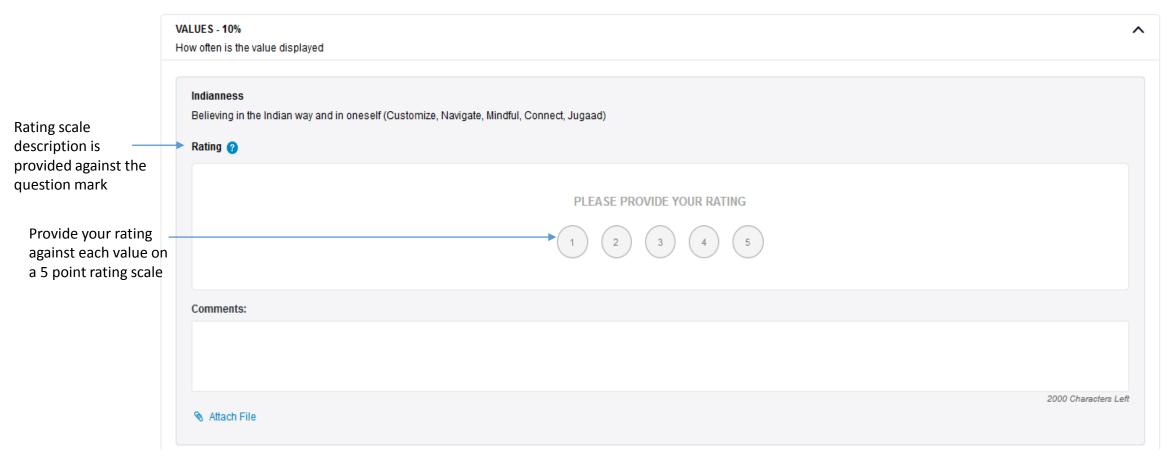
For Self-Rating, you need to enter your **Achievement** against each **Goal** and rate yourself on a **5 point rating scale**. Post this you would also need to rate your alignment with Future Group Values





Self Rating - Values

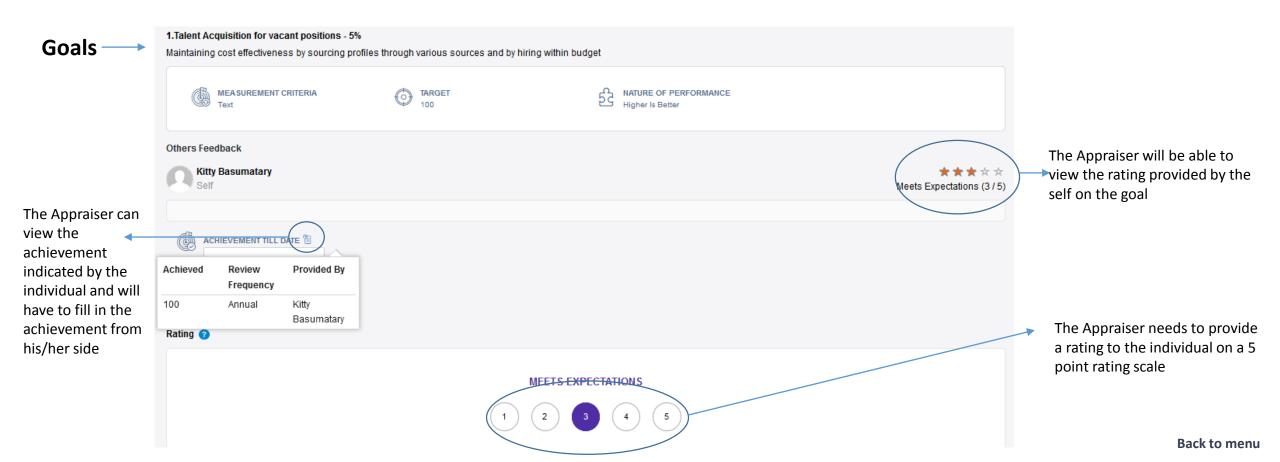
After rating the goals, you need to assess your alignment with the values of the organization





Appraiser Rating – Multiple Appraisers

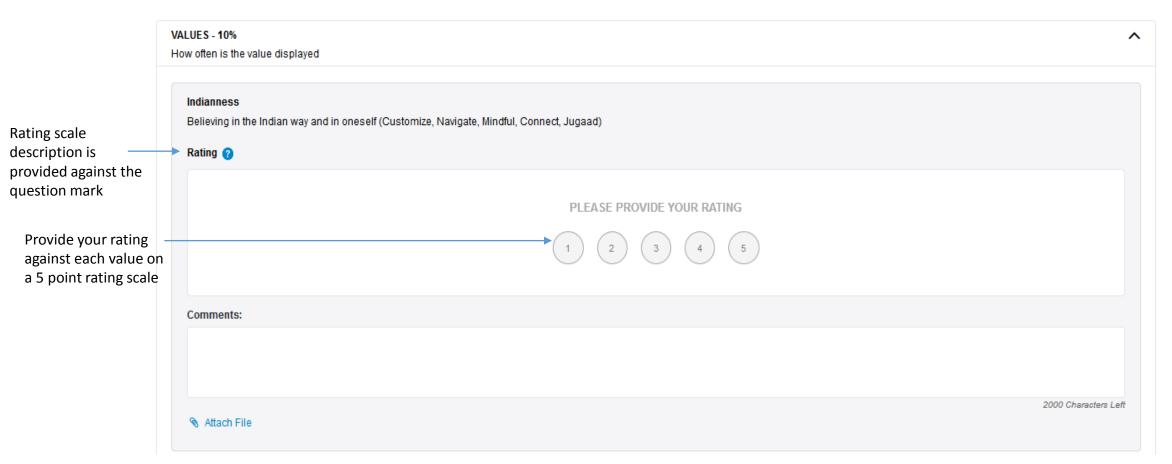
Once the ratings have been submitted by the individual, the feedback now moves to all the Appraisers for his/her ratings and recommendation. The Appraisers also needs to input the Achievement and provide a rating against each goal on a 5 point rating scale





Appraiser Rating – Multiple Appraisers

After rating the goals, all the Appraisers also need to rate the values

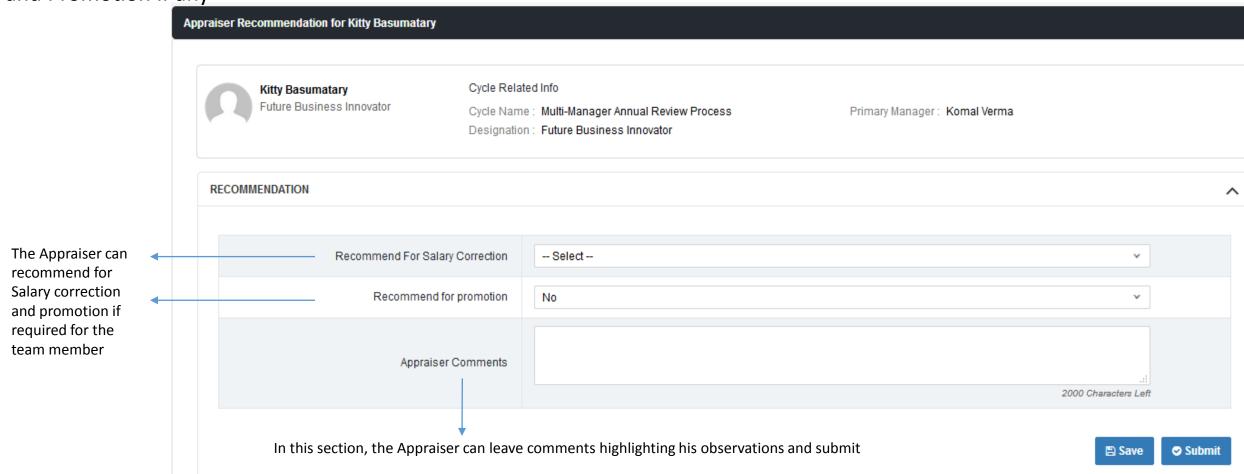


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Appraiser Recommendation – Multiple Appraisers

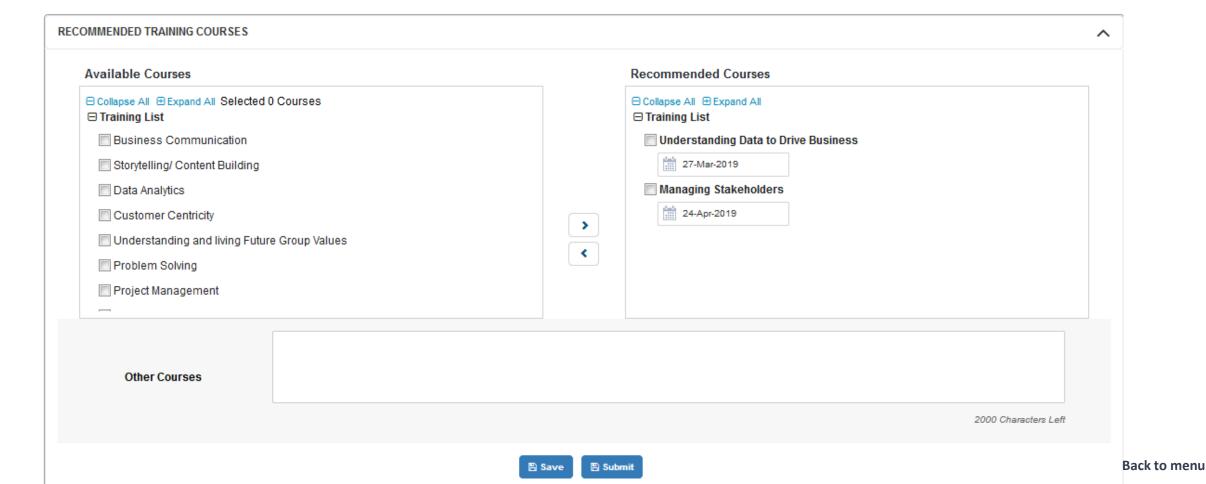
After rating the goals, all the Primary Appraiser or Appraiser 1 needs to be provide their recommendation for Salary Correction and Promotion if any





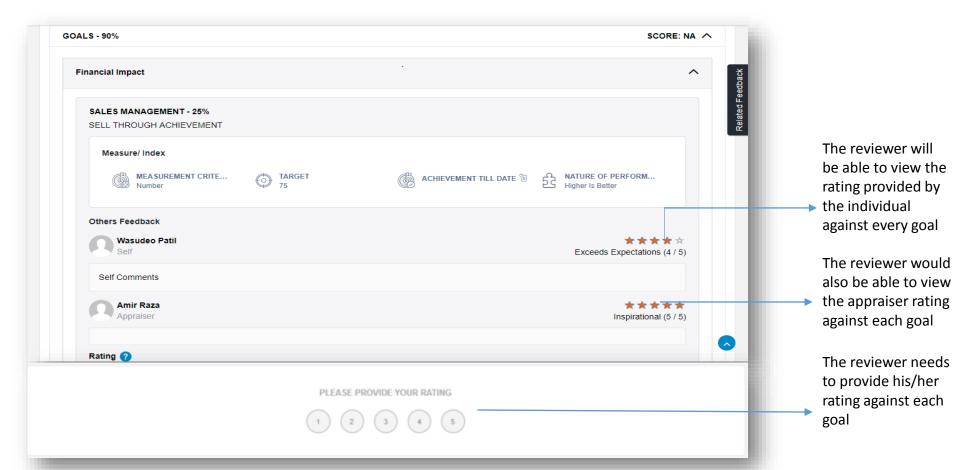
Appraiser Training Recommendation – Multiple Appraisers

The Primary Appraiser or Appraiser 1 needs to recommend Training courses for the individual post the rating and the recommendation



Reviewer Rating – Multiple Appraisers (Managers)

Once the ratings and recommendation have been submitted by the Primary Appraiser, the workflow will directly move to the reviewer for his final rating and recommendation on the goals and the values. The reviewer would be able to view the option in the **My pending Actions** on the dashboard.

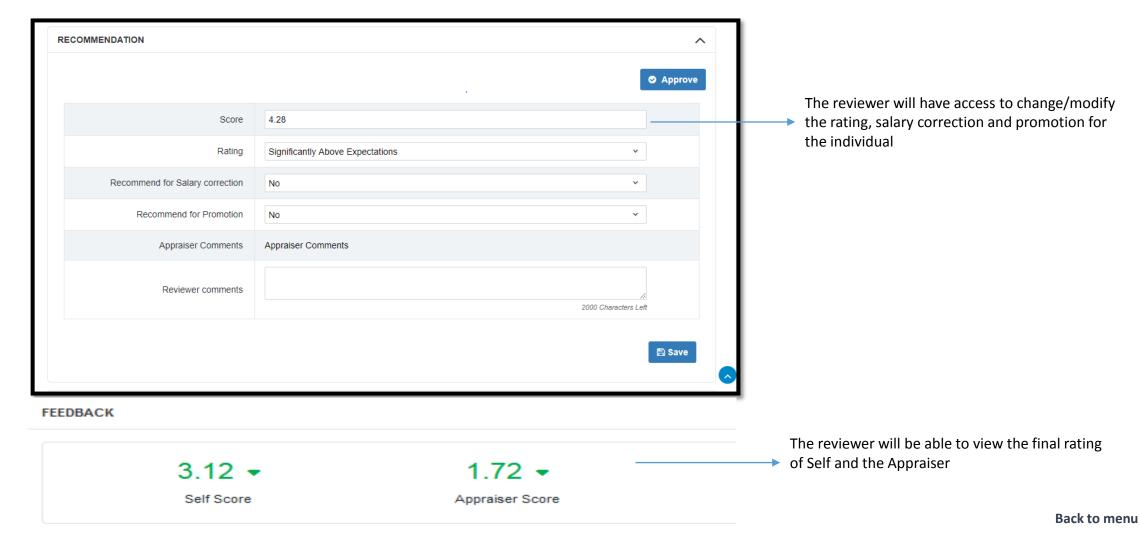


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Reviewer Recommendation

Once the ratings have been provided by the reviewer, the reviewer needs to provide his final rating and recommendation



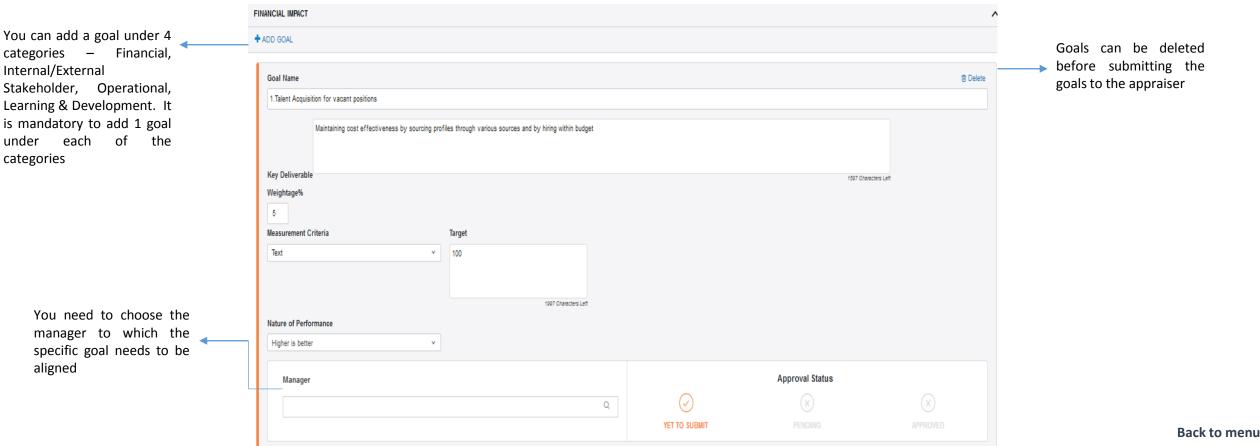
Appraisal Process – Multiple Appraisers (Managers) – Process where goals are divided between 2 appraisers

Band 2 and above



Goal Setting – Multiple Appraisers

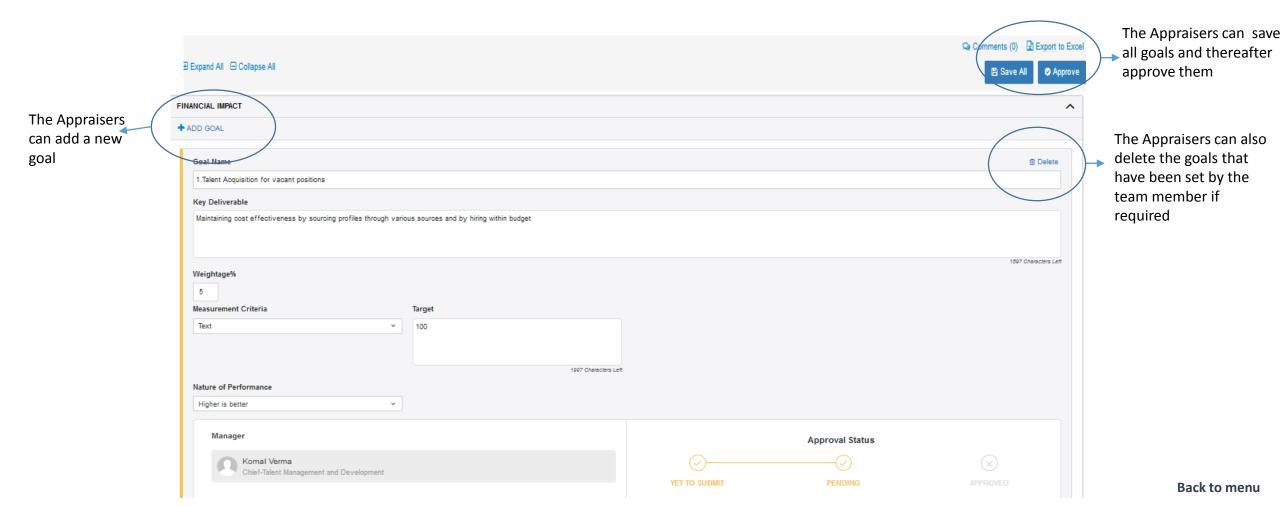
You can access the **Set Goals** page directly from **Proceed to Action Items** on the Landing page or can Click on **Performance** and then move to **My Action Items**. Once you click on the **Set Goals** option, you would be able to **add/edit/delete your goals**. Make sure you select the corresponding Appraiser while adding each goal. Please note-minimum 50% of your goals need to be mapped to your primary manager. You can then save and submit the goals to the Appraisers for approval.





Goal Approval – Multiple Appraisers

Once the team members have submitted their goals, the Appraisers would be able to view the specific goals that are assigned to him/her and can approve the same. The Appraisers can also initiate, edit and delete, reassign weightages to goals.

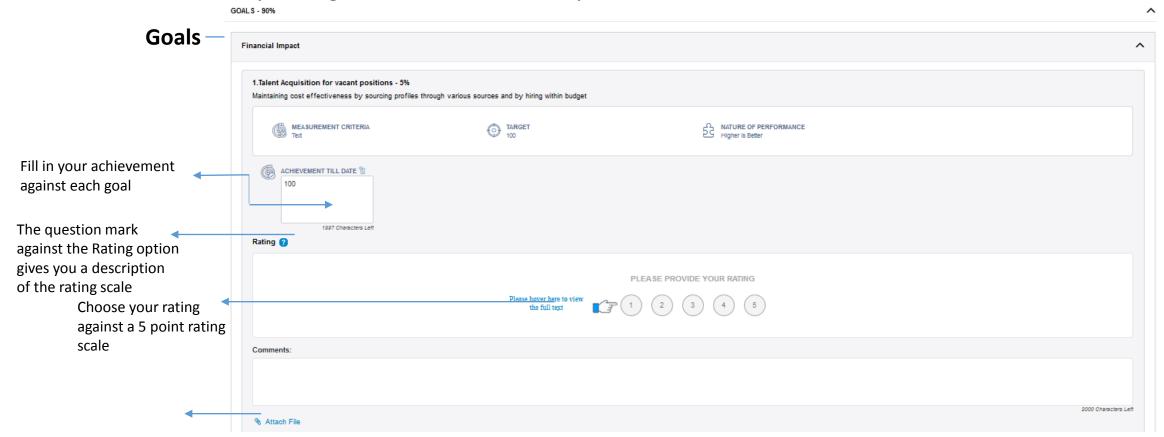




Self Rating - Goals

Once goals have been approved by the Manager, the process now moves to the Self Rating stage. You can access your Pending activities from your Dashboard and chose the Self Rating option.

For Self-Rating, you need to enter your **Achievement** against each **Goal** and rate yourself on a **5 point rating scale**. Post this you would also need to rate your alignment with Future Group Values

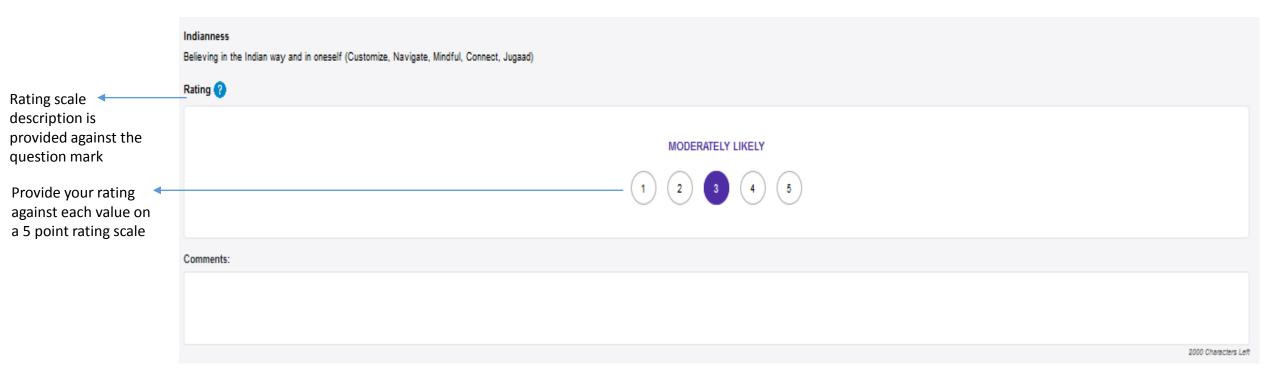


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Self Rating - Values

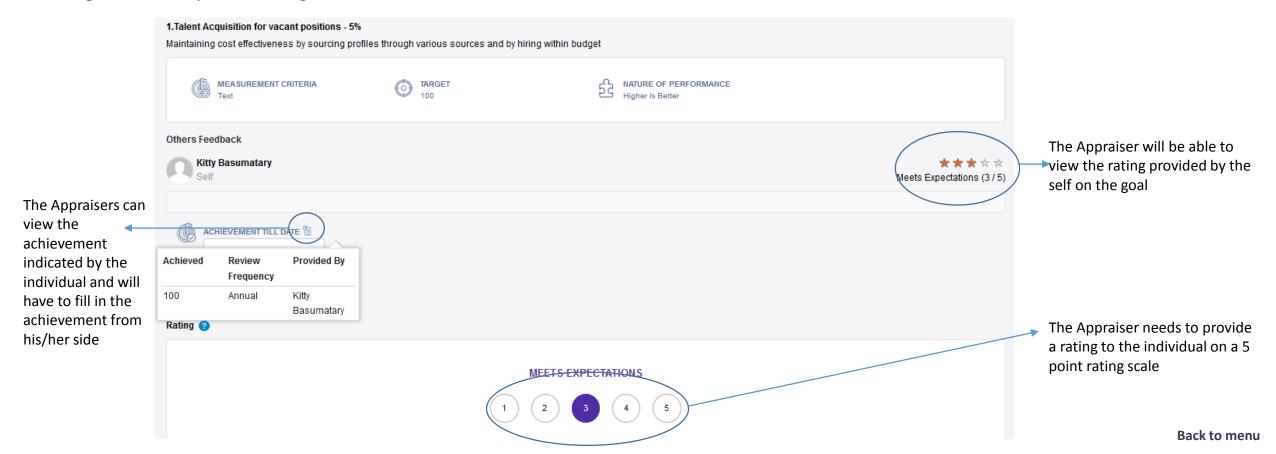
After rating the goals, you need to assess your alignment with the values of the organization





Appraiser Rating – Multiple Appraisers

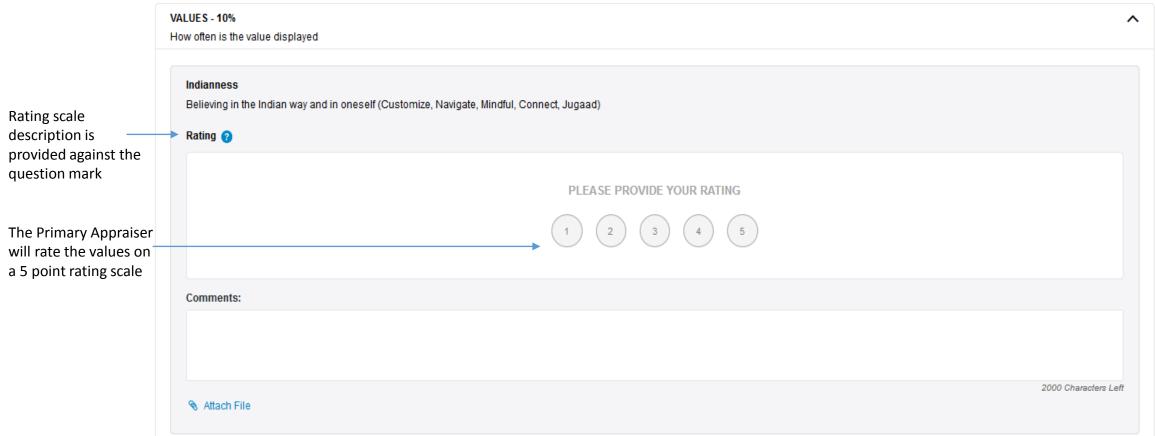
Once the ratings have been submitted by the individual, the assessment now moves to the respective Appraiser for his/her ratings and recommendation on the goals assigned to them. The Appraisers would be able to view the Appraiser Assessment under my Pending actions on the Dashboard. The Appraisers also needs to input the Achievement and provide a rating against each goal on a 5 point rating scale





Appraiser Rating – Multiple Appraisers

After rating the goals, the Primary Appraiser also needs to rate the values

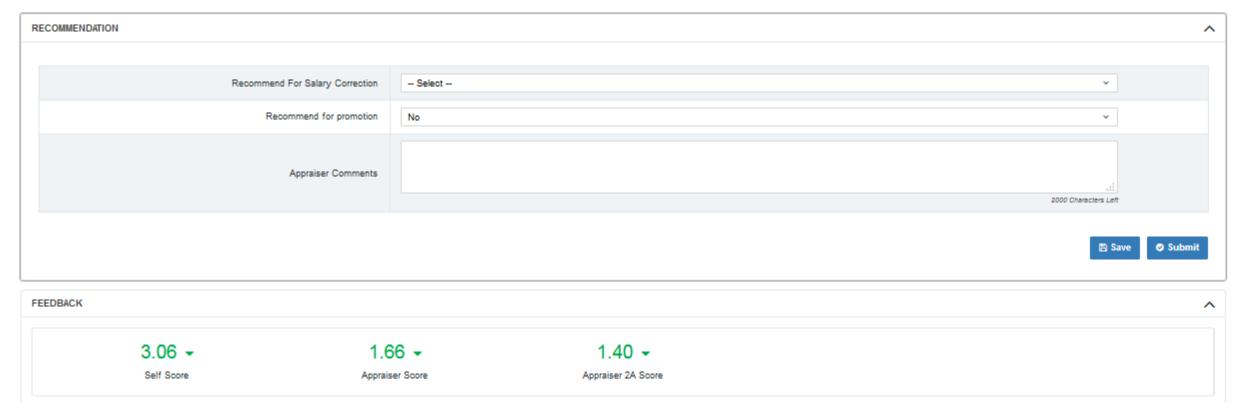


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Appraiser Recommendation – Multiple Appraisers

Once the ratings have been submitted for the goals by the respective appraisers, the process now moves to Primary Appraiser (Manager) for his/her recommendation

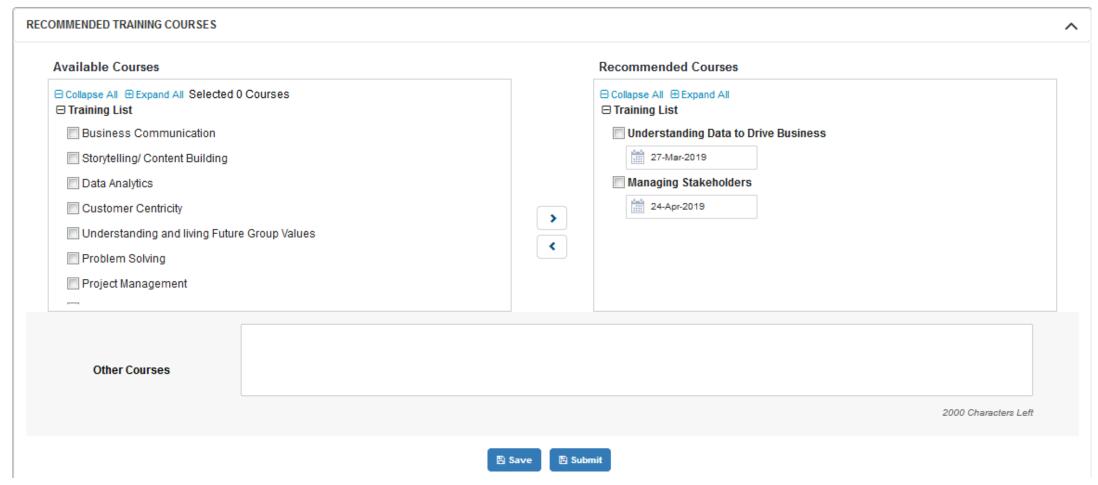


The Primary Manager would be able to view the Self Score and the score of both the Appraisers



Appraiser Training Recommendation – Multiple Appraisers

The Primary Appraiser needs to recommend Training courses for the individual post the rating and the recommendation

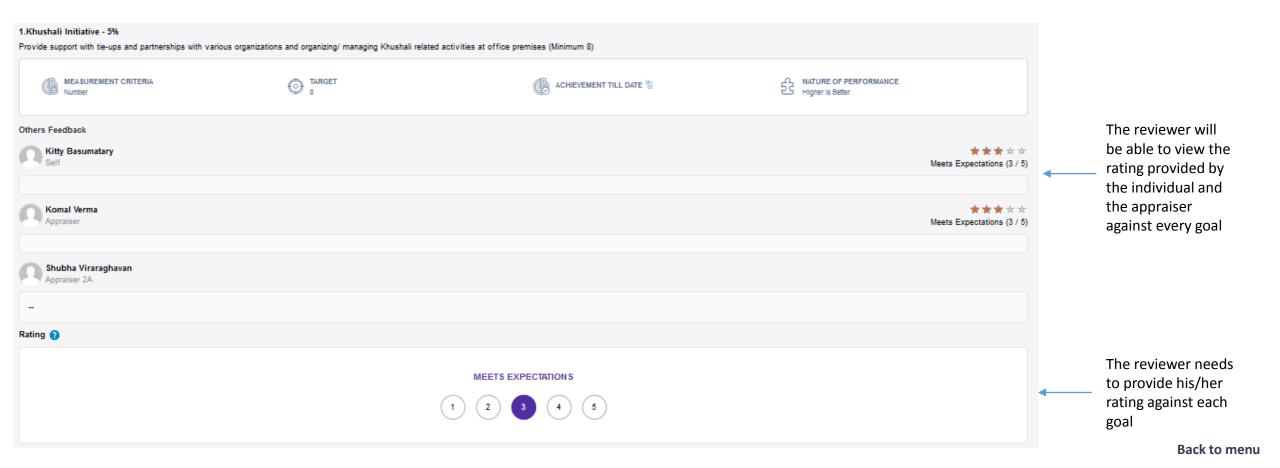


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Reviewer Rating

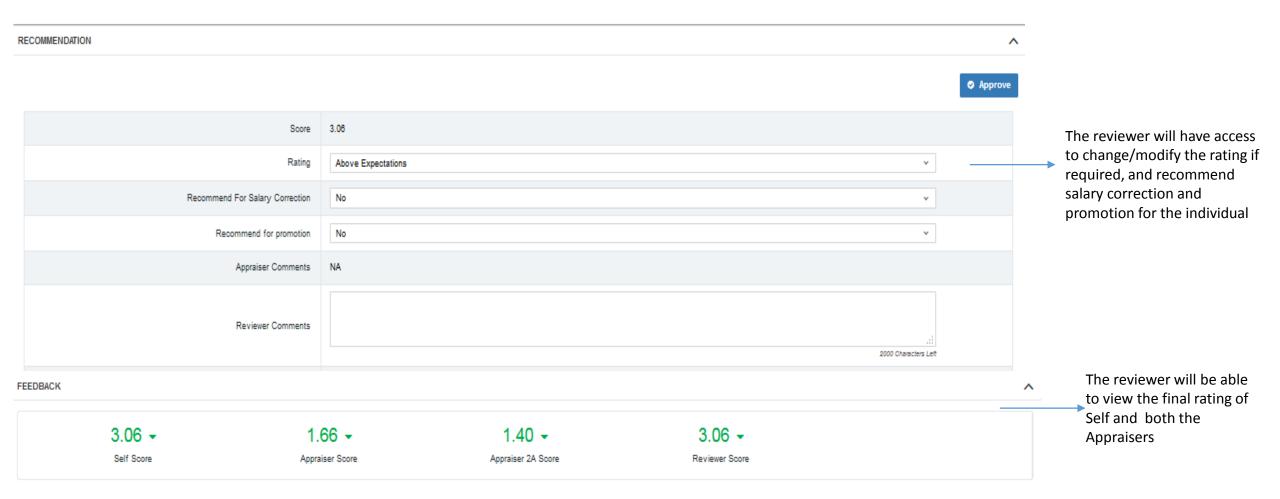
Once the ratings from both Appraisers and recommendation from Primary Appraiser have been submitted, the workflow will move to the reviewer for his final rating and recommendation on the goals and the values. The reviewer would be able to view the option in the **My pending Actions** on the dashboard.





Reviewer Recommendation

Once the ratings have been provided by the reviewer, the reviewer needs to provide his final rating and recommendation

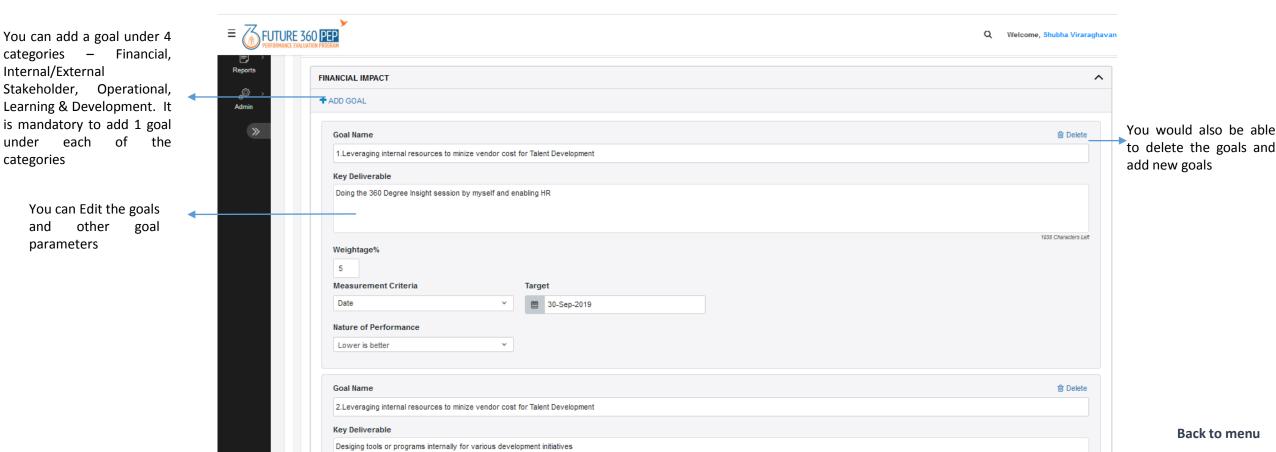


Band 2 and above



Goal Setting

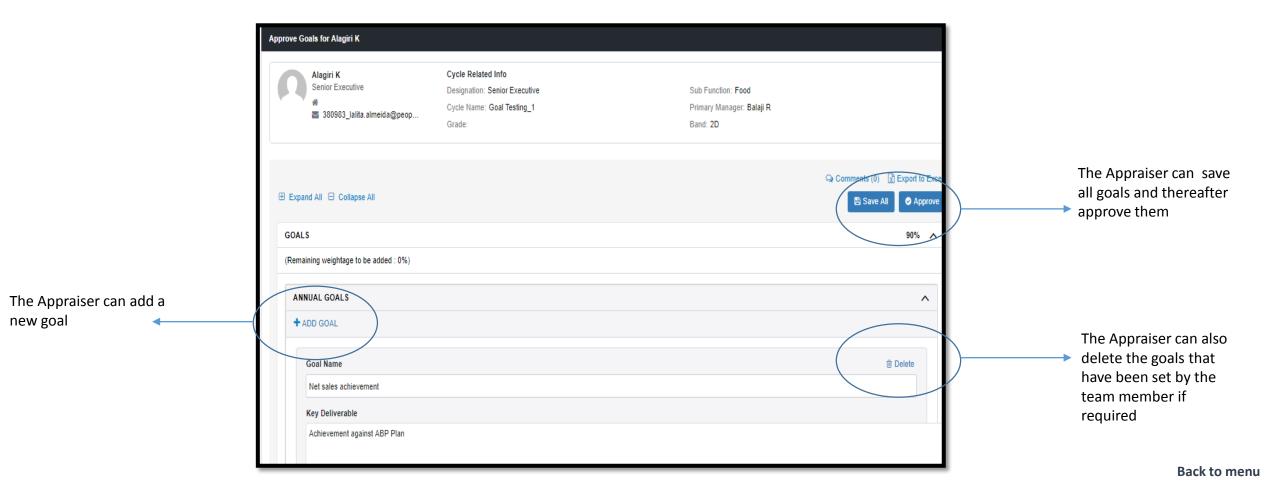
You can access the **Set Goals** page directly from **Proceed to Action Items** on the Landing page or can Click on **Performance** and then move to **My Action Items**. Once you click on the **Set Goals** option, you would be able to **add/edit/delete your goals**. You can then save and submit the goals to the Appraiser for approval. In this case the Appraiser and Reviewer will be the same.





Goal Approval

Once the team members have submitted their goals, the Appraiser/Reviewer would be able to view the Approve Goals option in the Dashboard under pending activities. The Appraiser can initiate, edit and delete, reassign weightages to goals.

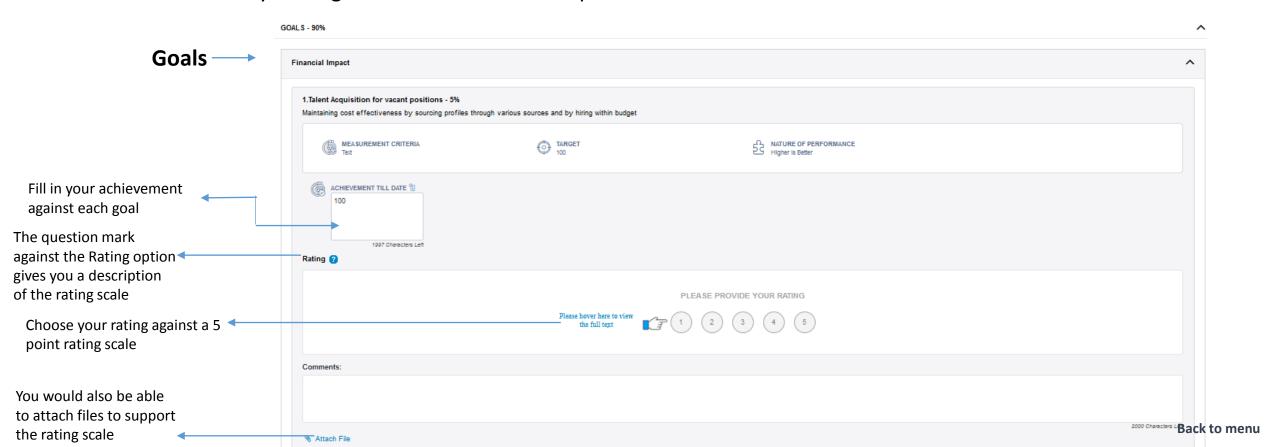




Self Rating - Goals

Once goals have been approved by the Manager, the process now moves to the Self Rating stage. You can access your Pending activities from your Dashboard and chose the Self Rating option.

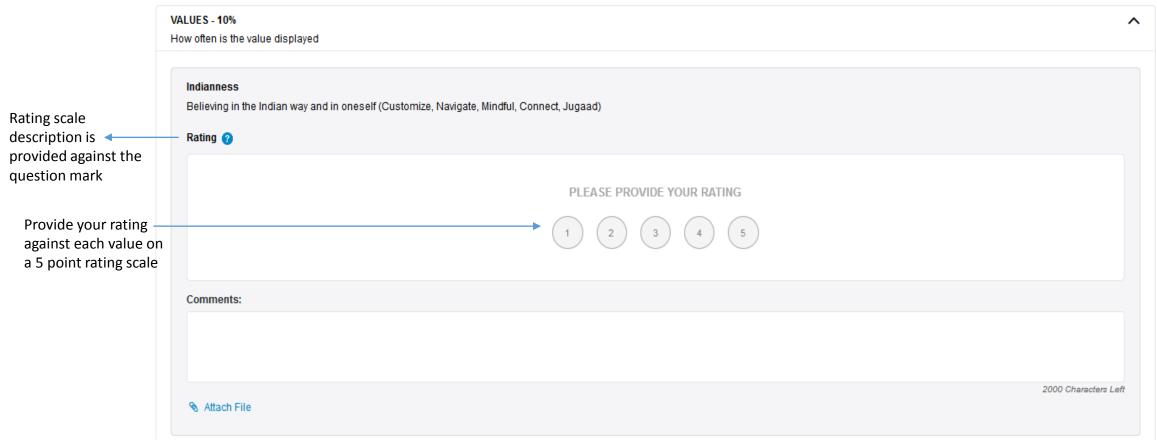
For Self-Rating, you need to enter your **Achievement** against each **Goal** and rate yourself on a **5 point rating scale**. Post this you would also need to rate your alignment with Future Group Values





Self Rating - Values

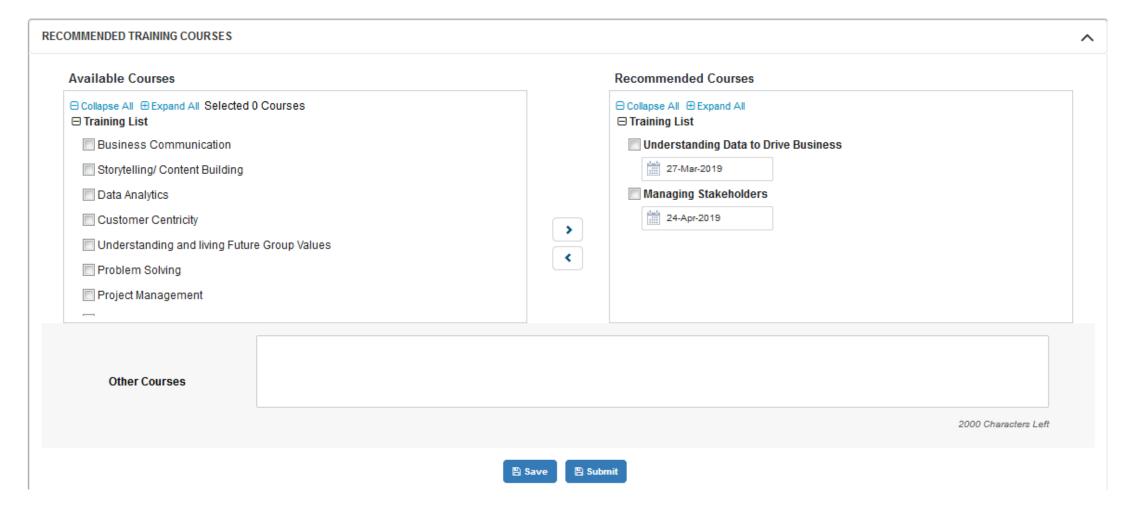
After rating the goals, you need to assess your alignment with the values of the organization





Appraiser/ Reviewer Training Recommendation

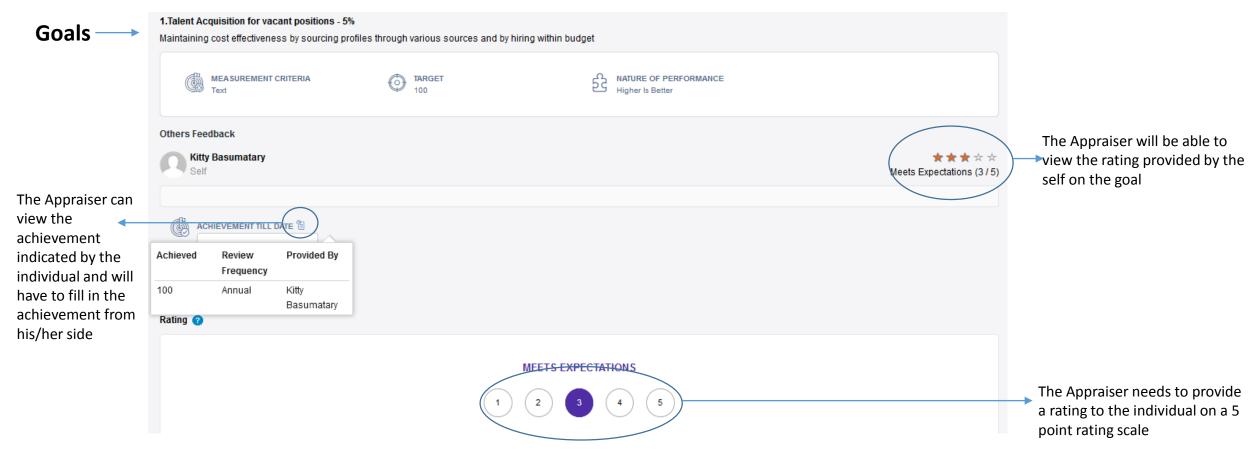
Once the ratings have been submitted by the individual, the feedback moves to the Appraiser/ Reviewer for Training course recommendation.





Appraiser/ Reviewer Rating

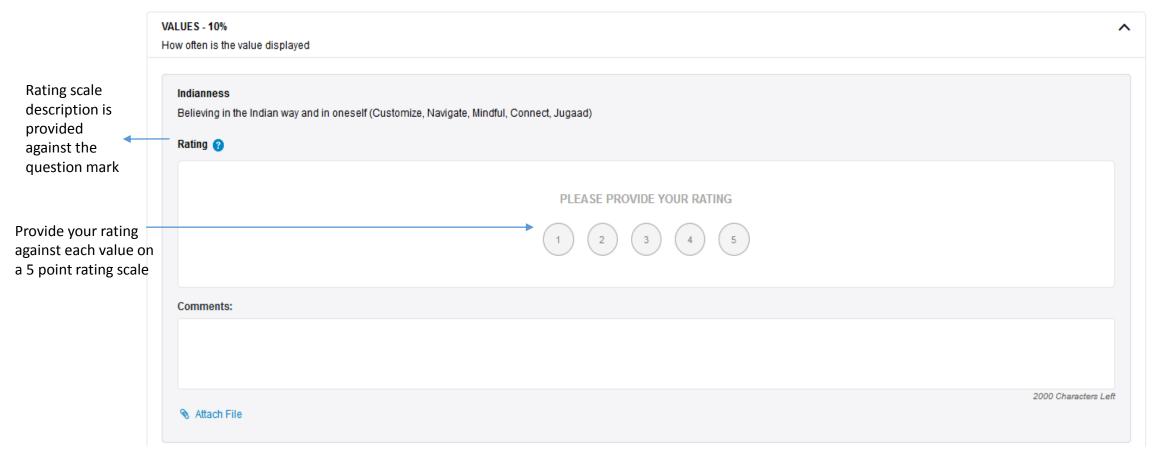
Once the training recommendations are submitted, the feedback moves to the Appraiser/ Reviewer for his/her ratings and recommendation. The Appraiser also needs to input the Achievement and provide a rating against each goal on a 5 point rating scale





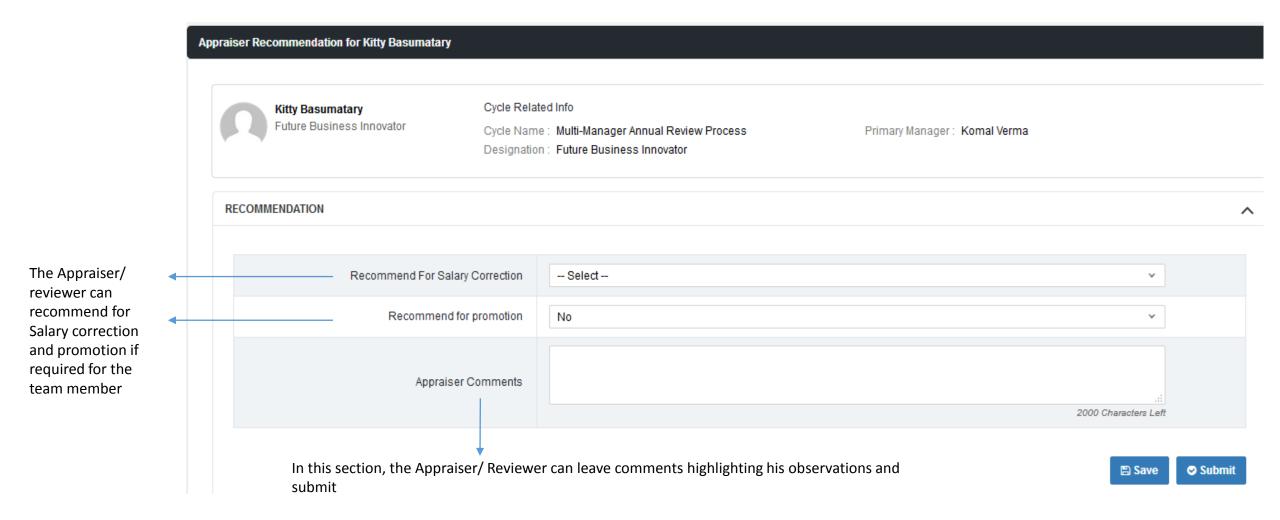
Appraiser/ Reviewer Rating on values

After rating the goals, the Appraiser/Reviewer also needs to rate the values





Appraiser/ Reviewer Recommendation



Thank you.