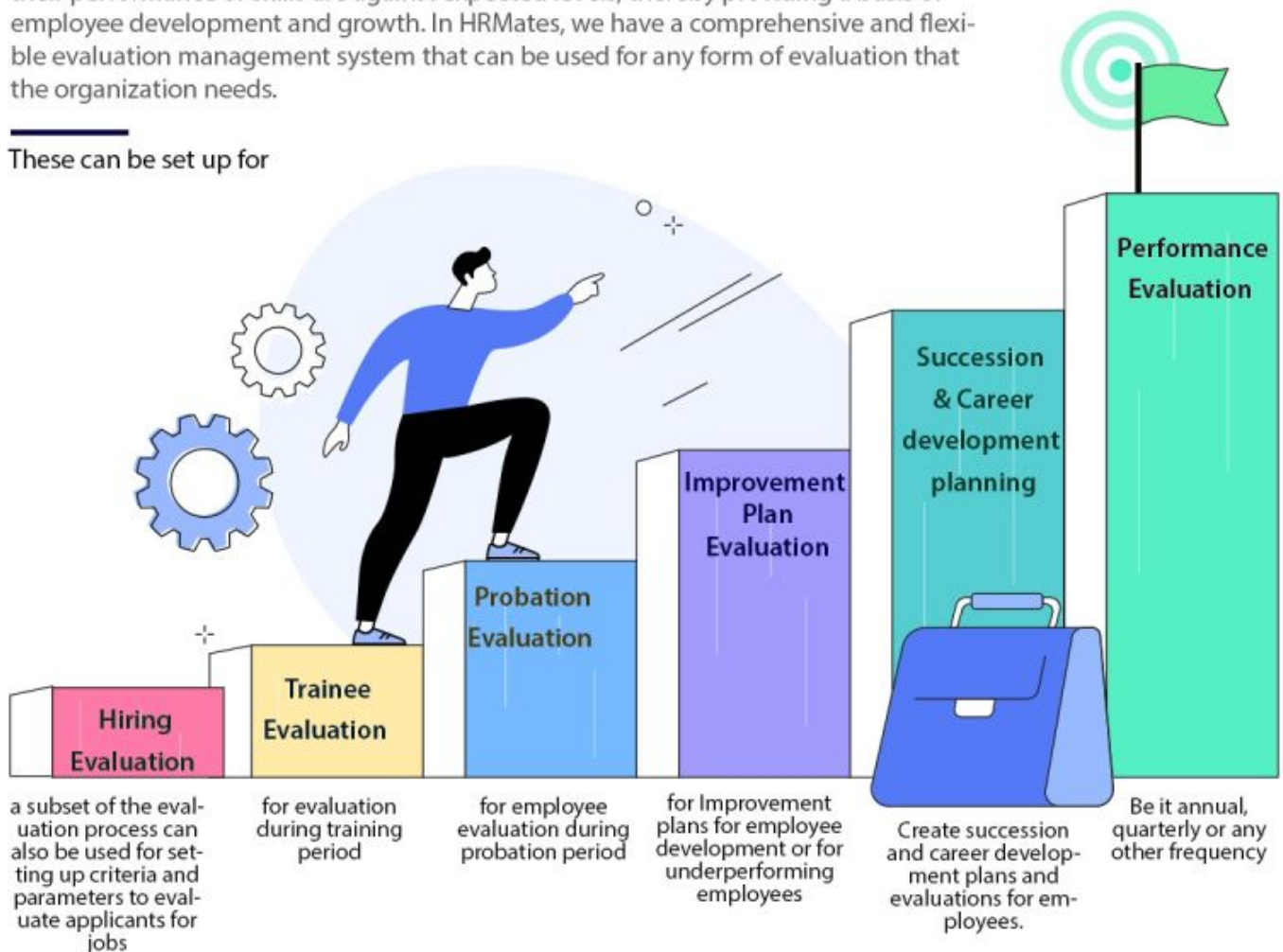


HRMates People Evaluation



Evaluation is a critical Talent Management and engagement process in every company. This is the method through which the management lets the employee know how their performance or skills are against expected levels, thereby providing a basis of employee development and growth. In HRMates, we have a comprehensive and flexible evaluation management system that can be used for any form of evaluation that the organization needs.

These can be set up for



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Overview

Evaluation is a critical Talent Management and engagement process in every company. This is the method through which the management lets the employee know how their performance or skills are against expected levels, thereby providing a basis of employee development and growth. Done well and objectively, it's a strong employee motivator and the converse is equally true. In HRMates, we have a comprehensive and flexible evaluation management system that can be used for any form of evaluation that the organization needs, include any of the stakeholders and run it at any frequency.

Evaluation Purpose

- Performance evaluation - Be it annual, quarterly or any other frequency
- Succession and Career development planning - Create succession and career development plans and evaluations for employees.
- Probation evaluation - For employee evaluation during probation period
- Trainee evaluation - For evaluation during training period
- Improvement Plan evaluation - For Improvement plans for employee development or for underperforming employees.
- Hiring Evaluation - Used for setting up criteria and parameters to evaluate applicants for jobs.

Stakeholders

- Employee
- Managers
- Heads, CEO etc
- Peers
- Reportees
- Vendors
- Customers

The Evaluation system provides for setting goals - KRA's and KPI's and measurements against these thus creating a transparent communication between the manager and subordinates. The goals can be quantitative or qualitative and the data for measurements against the goals can be auto populated from the data generation systems, can be manually entered or even uploaded as an integration with external systems. Each of these parameters is flexible and can be configured based on the ecosystem, policy and procedures of the organization within the broad framework of best practices.



HRMates LogicBox™ provides the configurability to build customer specific calculations and UI specific to your needs.

Further more fine-grained evaluation can be done with Task Planner, task in task planner is linked to a KPI, tasks get approved and marked with achievement by managers. Aggregate achievement is populated into the evaluation form.

Evaluation Process

People Evaluation is conducted with following steps:

Develop Evaluation form

The system allows for different evaluation forms to be setup for different employee groups.

Areas definitions

This contains Areas of performance i.e the goals that are primary requirement of the job and if needed secondary areas such as behavioral etc. it also contains other elements of evaluation such as parameters of potential or 360 or similar feedback. For cascading goals, targets can be distributed from top down, and tracked using Task Planners.

Set guidelines for evaluation

Guidelines for the evaluation process - notes for the appraisee and appraiser, definitions of performance levels and the interpretation of each, the performance process or timelines can all be communicated through the guidelines which are documented in the forms.

Form editing

At each activity stage, the form edits can be controlled - whether to allow add, update or view only by the activity owner. Field level edits are controlled by the process components. Form level edits, to add/delete rows



Setup Goals for Employees

HRMates provides convenient tools to setup goals for evaluation

- Copy from template
- Copy from last year of employee
 - All
 - Particular Activity
- Copy from one area to another area of same employee
- Copy from Area in Template to all employees under that template
- Copy from another employee
- Manually edit by admin via Evaluation Management
- Manually edit by Employee via Notification
- Manually edit by Managers via Notification

Goals Approval Process

Manage Evaluation Cycle

Collaborative workflow for stakeholders to evaluate the employee with the desired frequency. Stakeholders can collaborate sequentially, parallel or as a team to complete ratings and other parameters.

Evaluation cycle is defined in the Approvals grid in evaluation form. Current approver is the first row with column **On** blank.

Evaluation can be under following state

- Active
 - If not paused and suspended
- Paused
 - If paused from **Evaluation Management** => **Pause Control**. Shown as light grey in Evaluation Management
 - Paused evaluations can be unpaused using **Evaluation Management** => **Pause Control**
- Suspended
 - If suspended from **Evaluation Management** => **Suspend**. Shown as red in Evaluation Management
 - Suspended Evaluation can be resumed using **Evaluation Management** => **Suspend**



Manage Approvers

- Setup approvers in template. When Evaluation is started against the template approvers from template will be copied to the evaluation.
- Use Add, Modify and Delete in Approvals grid in Evaluation form.
- From **Approval Control** in Evaluation Management you can download a template and then upload the approvers in bulk for all evaluations under that template.

Notification & Reminder

- If evaluation is suspended no notification is generated
- First approver with blank **On** column will receive the notification under following conditions
 - If **Notification before Compliance Date from** is checked in Settings=>Evaluation=>Activity else **Compliance Date from** not blank and less than or equal to today's date
- If Evaluation is paused, notification will still be generated on the dashboard but will not be active, reminder email is not sent.
- **Compliance Date To** will be mentioned in email reminder as expected date of approval.
- Auto daily email reminders to current approver will be sent
- Notification to approved stages on approval using **Notifier** in template

Generating Letter for Evaluation

Setup

this involves setting up letter template and map one or more letter to evaluation form

Ex of letters are increment, Promotion, PIP, etc letters

For mapping letter to evaluation you can add controls like Pickone letter type to evaluation template

In logic box use function --- to map evaluation letter to specific employee

To create letter template

Setting-->Employment-->Email template

My Evaluation

Using My Evaluation Employee can see following in read only mode

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- Own Evaluation
- Evaluation Done

Setup :

Employees will only see those fields in the Evaluation form which are marked Show in My Evaluation and all the editable activities in those fields are approved. The data in the fields not yet approved will appear blank

Overall Computations and Reporting

Calculators to compute overall ratings as per form design. Final Rating as per policy.

Reports for management decision making

- Talent Review Forms
- Ratings report for bell curve fitting and other analysis
- 9 box matrix, radio chart
- And more



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PA-PA MATRIX

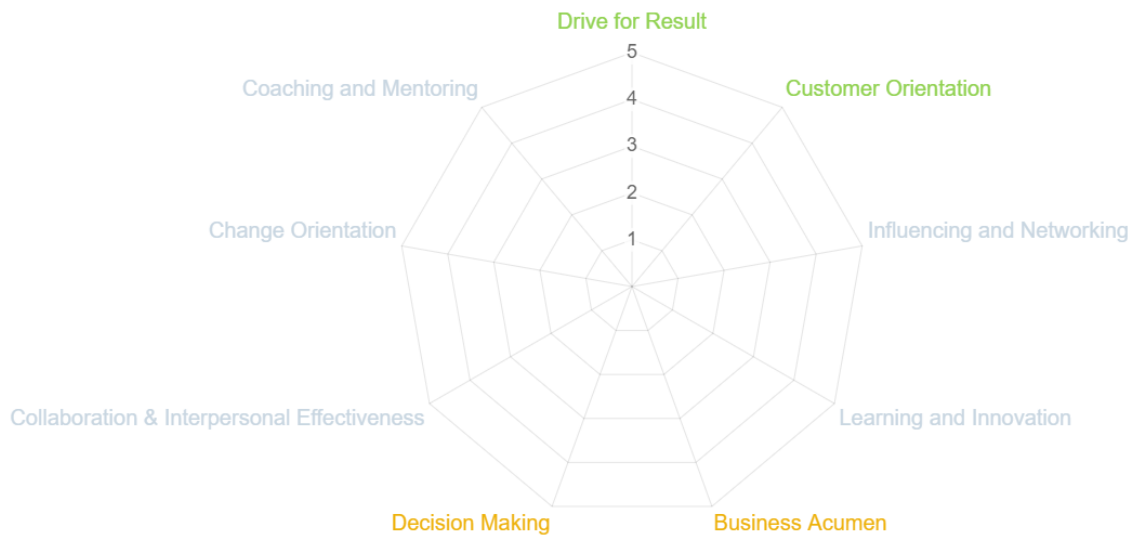
Year: 2021

Potential assessment ↑	0 1A ENGIMA High Potential Low Performer	0 2A GROWTH EMPLOYEE High Potential Medium Performer	0 3A FUTURE LEADER High Potential High Performer	3A FUTURE LEADER Limitations unknown; a "keeper" to build bench strength
	0 1B DILEMMA Medium Potential Low Performer	0 2B CORE EMPLOYEE Medium Potential Medium Performer	0 3B HIGH IMPACT PERFORMER Medium Potential High Performer	2A GROWTH EMPLOYEE Exhibit high potential & strong performance
	0 1C UNDER PERFORMER Low Potential Low Performer	0 2C EFFECTIVE Low Potential Medium Performer	0 3C TRUSTED PROFESSIONAL Low Potential High Performer	1A ENGIMA Lack of skill or lack of will
				3B HIGH IMPACT PERFORMER Top performer who may be ready for more
				2B CORE EMPLOYEE Performs to standards, contributes moderately
				1B DILEMMA Unable to perform as need in the current role
				3C TRUSTED PROFESSIONAL High performer, no more room to grow
				2C EFFECTIVE Performs to standards, not showing potential
				1C UNDER PERFORMER Bad hire / poor fit. Require replacement
Performance assessment →				

Competency Mapping

Year: 2021

Desired Proficiency level Current Proficiency level

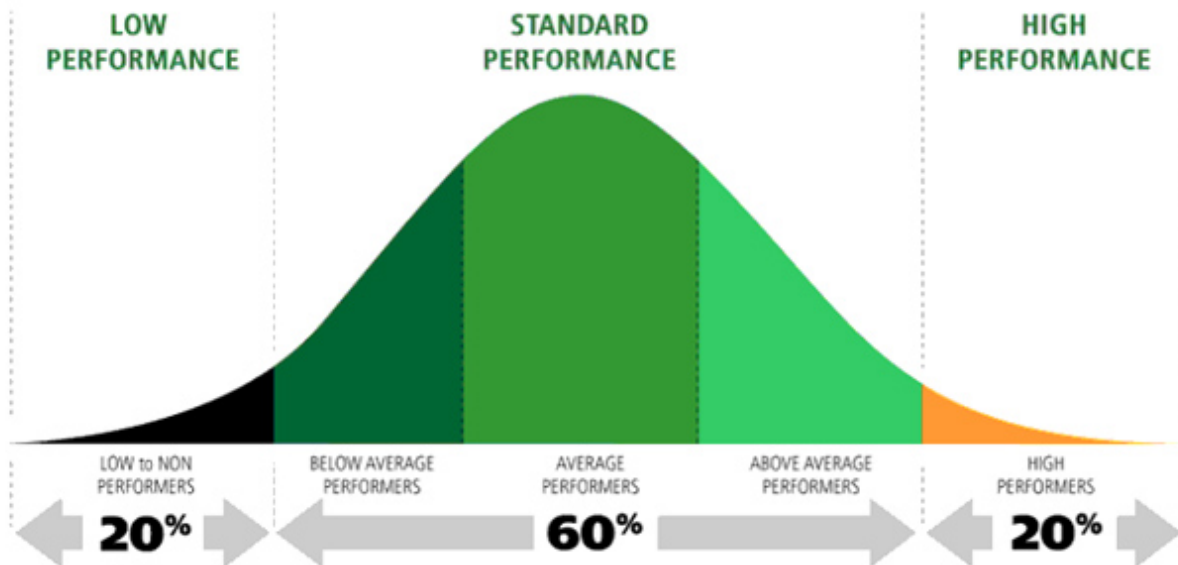


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Evaluation Closure

- Confirmations, Promotions, Increments, Exits or Performance improvement plan
- Letters Generation
- Acceptance Process
- Feedback



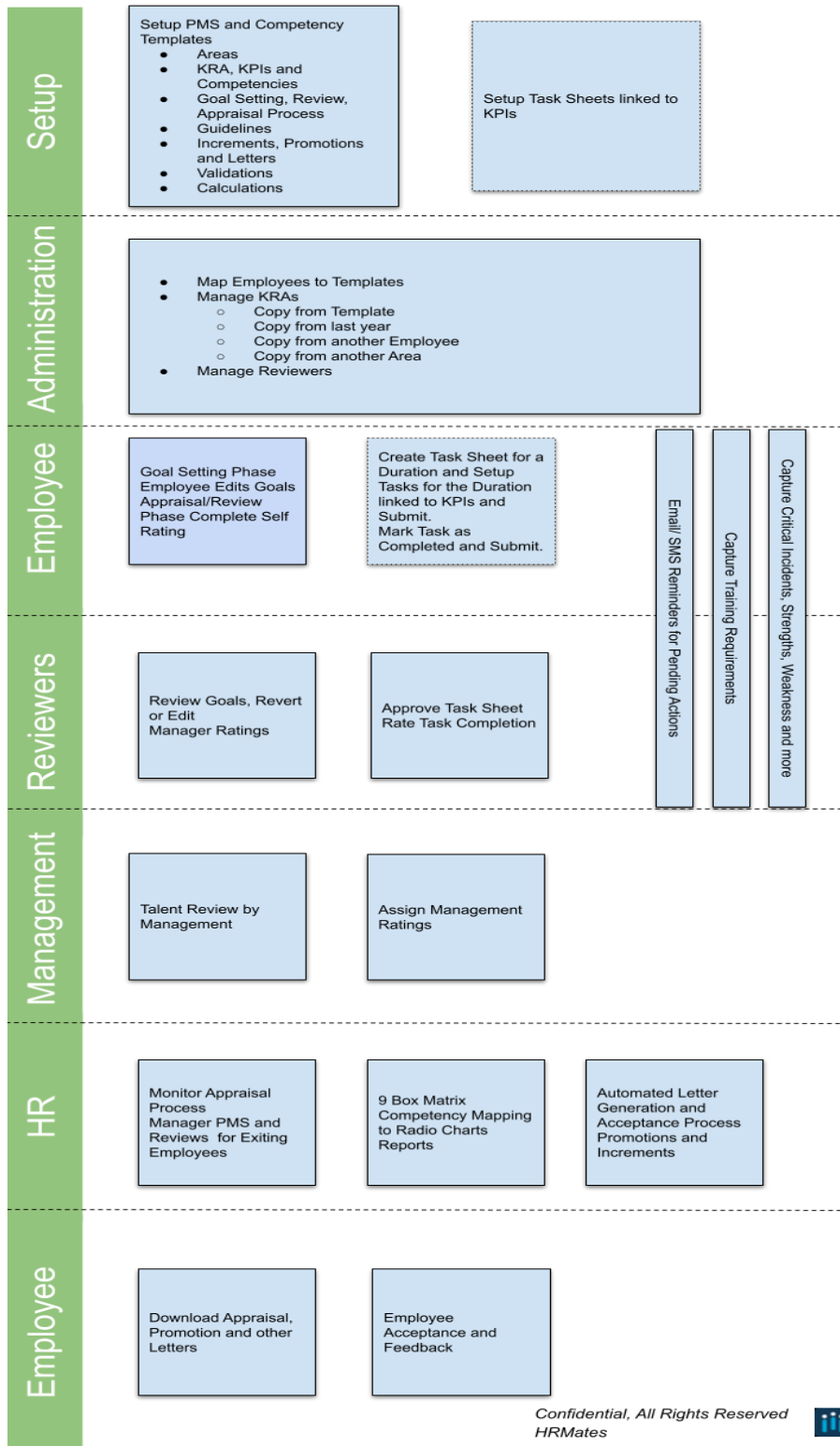
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HRMates Evaluation Flowchart



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