

System overview

 totara perform



Totara Perform is a continuous performance management system that empowers you to manage organisational and personal goals, manage skill competencies, deliver performance activities (appraisals, feedback, check-ins), deliver detailed reporting on performance and support a transition from current practice to best practice.

Why performance management?

Performance management is critical to aligning staff around a common set of objectives and goals.

It provides opportunities to give feedback and identify professional development needs or opportunities.

- Increase employee engagement
- Improve workplace productivity
- Identify skill gaps and areas for training
- Support high and low performers

Why choose Totara Perform?

- Open technology and easy to use
- Can be customised and personalised
- Highly adaptable
- Cost effective
- Totara core
 - Automation
 - Reporting
 - HR Import
 - Multitenancy



Key Features

- ✓ Performance activities
- ✓ Appraisals
- ✓ Feedback
- ✓ Check-ins
- ✓ Performance review workflow builder
- ✓ Flexible check-ins
- ✓ 360-degree feedback
- ✓ Skills tracking and development
- ✓ Powerful graphical reporting
- ✓ Personal and organisational goals
- ✓ Advanced competency assignment and tracking
- ✓ Competency profile
- ✓ Multiple achievement paths
- ✓ Tailored content

Competencies

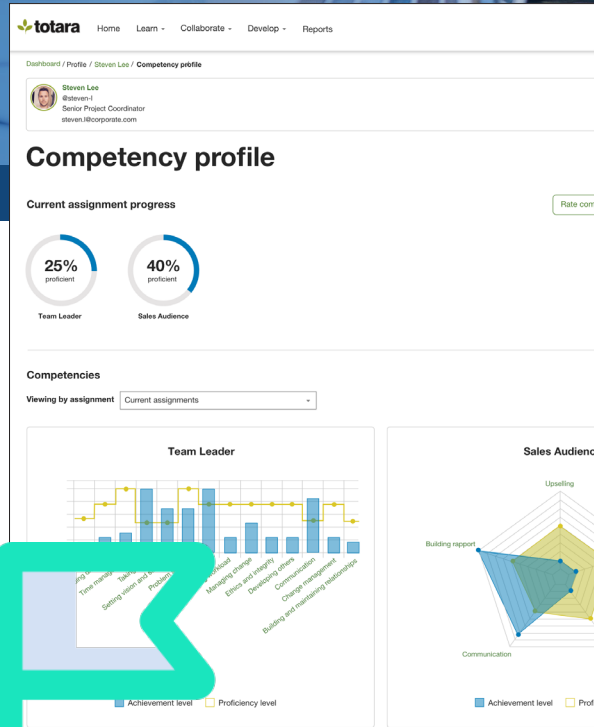
Give your team the skills they need to succeed.

- Provide transparency and create hierarchies around the skills and capabilities employees need in their role.
- Organise competencies by audience, position, organisation or by individual.
- Clearly show the training individuals need to reach a certain competency.
- Add proficiency scales to competencies.
- Upload competencies via HR Import.

Achievement paths

Help ensure your staff reach their goals and build a highly skilled, motivated team.

- Set achievement paths with training aligned for each of your competencies.
- Use flexible options to rate and score competency improvements.
- View competency scales for individuals before and after training.
- Support your team in achieving their professional goals.



Performance activities

Build appraisals and processes that work perfectly with your organisation.

- Tailor appraisals, feedback and check-ins to suit your organisation's needs.
- Ensure confidentiality with comprehensive access and visibility controls.
- Automate the scheduling of performance activities in a flexible manner.
- Build editable and searchable reports.
- Drill into the details of performance activities easily.

Check-ins

Drive efficiency and get a holistic view of performance with structured check-ins.

- Create, assign and record tailor-made check-ins.
- Easily review check-in activities and completion for each employee.
- Assign check-in activities by organisation, audience or position.
- Automate check-in bookings and notifications.
- Provide employees with dashboards to review the activities assigned to them, complete them or save them as drafts.

The screenshot displays the Totara web interface for a 'Conversational check-in'. At the top, the Totara logo and navigation links (Home, Learn, Collaborate, Develop, Reports) are visible. Below the navigation bar, the user 'James Hansen' is logged in. The main heading is 'Conversational check-in', followed by a note: 'Your responses (once submitted) are visible to your Managers'. A section titled '*Response required*' contains three questions with corresponding 'Your response' and 'Subject response' fields. The first question is 'How do you feel the last month has progressed? *', with the manager's response being 'You have really done a great job driving the team towards a shared goal and have taken on board last month's chat.' and the employee's response being 'I am really pleased with the outcome of project Z, it feels like we have really pulled together as a team and are delivering good value for our clients.' The second question is 'Do you want to raise any concerns? *', with the manager's response being 'I was going to raise a similar issue, I have a team of 12, I am more than happy to provide additional support but I need you to let me know when you need help instead of waiting until pre-arranged catch-ups.' and the employee's response being 'Sometimes I feel I would like more support from you when I am working on tasks which are a first for me.' The third question is 'How can we help each other achieve our goals in the next month? *', with the manager's response being 'Agreed, let's get together to check our availability and go from there.' and the employee's response being 'I think it would be great to just schedule in a couple of extra check-ins to bounce ideas off one another. This type of activity really helps me work things through.' Below these questions is an optional section 'Is there anything else you would like to discuss? (optional)' with the manager's response being 'Not from me, thank you are doing a great job and I am looking forward to seeing the results of project z when they are in.' and the employee's response being 'Nothing in particular this month, I think I have settled into the working from home and my productivity is back up now I have some dedicated space in the house to work.' At the bottom right, it says 'You are logged in as Florence H. Log out' and 'Powered by Totara Learn'.



Feedback

Structure feedback in a way that works for your business, supply fair and transparent feedback for staff.

- Easily create tailor-made feedback performance activities.
- Assign feedback activities based on a user's audience, organisation or position.
- Create 360- or 270-degree feedback forms for job assignments or as a one off.
- Create your own type of feedback form.
- Distribute feedback forms to a wide range of people.
- Anonymise responses and apply visibility restrictions.

Scheduling

You can save time and money by automating repetitive tasks and reminders.

- Ensure performance activities are timely and relevant by utilising the comprehensive assignment and scheduling functionality.
- Assign activities by organisational frameworks, audiences or position frameworks.
- Send push notifications.

A screenshot of the Totara LMS interface showing the configuration for an 'End of year review' activity. The page has a navigation bar with 'totara' and links for Home, Learn, Collaborate, Develop, and Reports. The activity is currently in a 'draft state'. The 'Assignment' tab is selected, showing 'Assigned users' (General staff A, General staff B) and 'Activity instance creation' settings. The 'Creation range' is set to 'Limited', 'Date type' is 'Fixed', and 'Frequency' is 'Once'. The 'Due date' is 'Enabled'. A section titled 'Limited range defined by relative dates' shows a reference date and a range of dates (from date to after date) defined in days.

Reporting

Easily organise and schedule your performance activity reports.

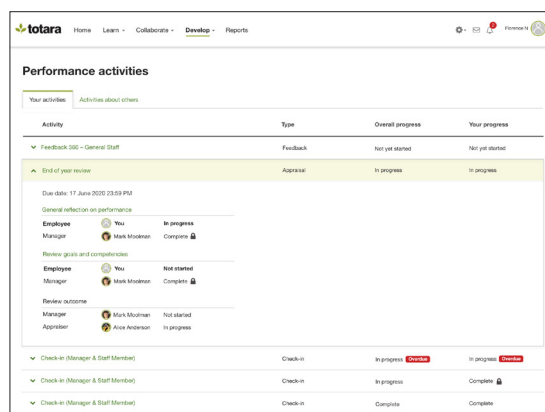
- Apply a report ID to specific questions. Then, pull the questions into any report using the ID.
- Provide employees with simple dashboard reporting, detailing performance activity progress.
- Easily create graphs and visualisations of your data.
- Export reports.
- Schedule reports to be automatically sent to you and other users, inside or outside the organisation.

Continuous performance management

Continuous performance management gives managers snapshots of employee performance throughout the year.

They can see their team's achievements, difficulties and feedback from others, helping to frame annual appraisals. Managers can see where employees need to improve and grow, which they can then align with training and development. This, in turn, improves engagement and motivation.

- Automate regular performance management activities.
- Identify gaps in competencies as opportunities for further development.
- Set goals which are reviewed regularly and link them with the organisation's vision.
- Track progress towards goals.
- Automate check-ins and 360/270-degree feedback with tailor-made templates.



Activity	Type	Overall progress	Your progress
Feedback 360 - General Staff	Feedback	Not yet started	Not yet started
End of year review	Appraisal	In progress	In progress
Due date: 17 June 2020 (2:00 PM) Overall reflection on performance			
Employee: You	In progress		
Manager: Mark Menden	Complete		
Review goals and competencies			
Employee: You	Not started		
Manager: Mark Menden	Complete		
Review outcome			
Manager: Mark Menden	Not started		
Appraiser: Alice Anderson	In progress		
Check-in (Manager & Staff Member)	Check-in	In progress	In progress
Check-in (Manager & Staff Member)	Check-in	In progress	Complete
Check-in (Manager & Staff Member)	Check-in	Complete	Complete





Ready to start your project?

Contact our team today to kick-start
your project, or if you're not quite
sure where to start and need some
advice, we can help with that too!

 **0330 660 1111**