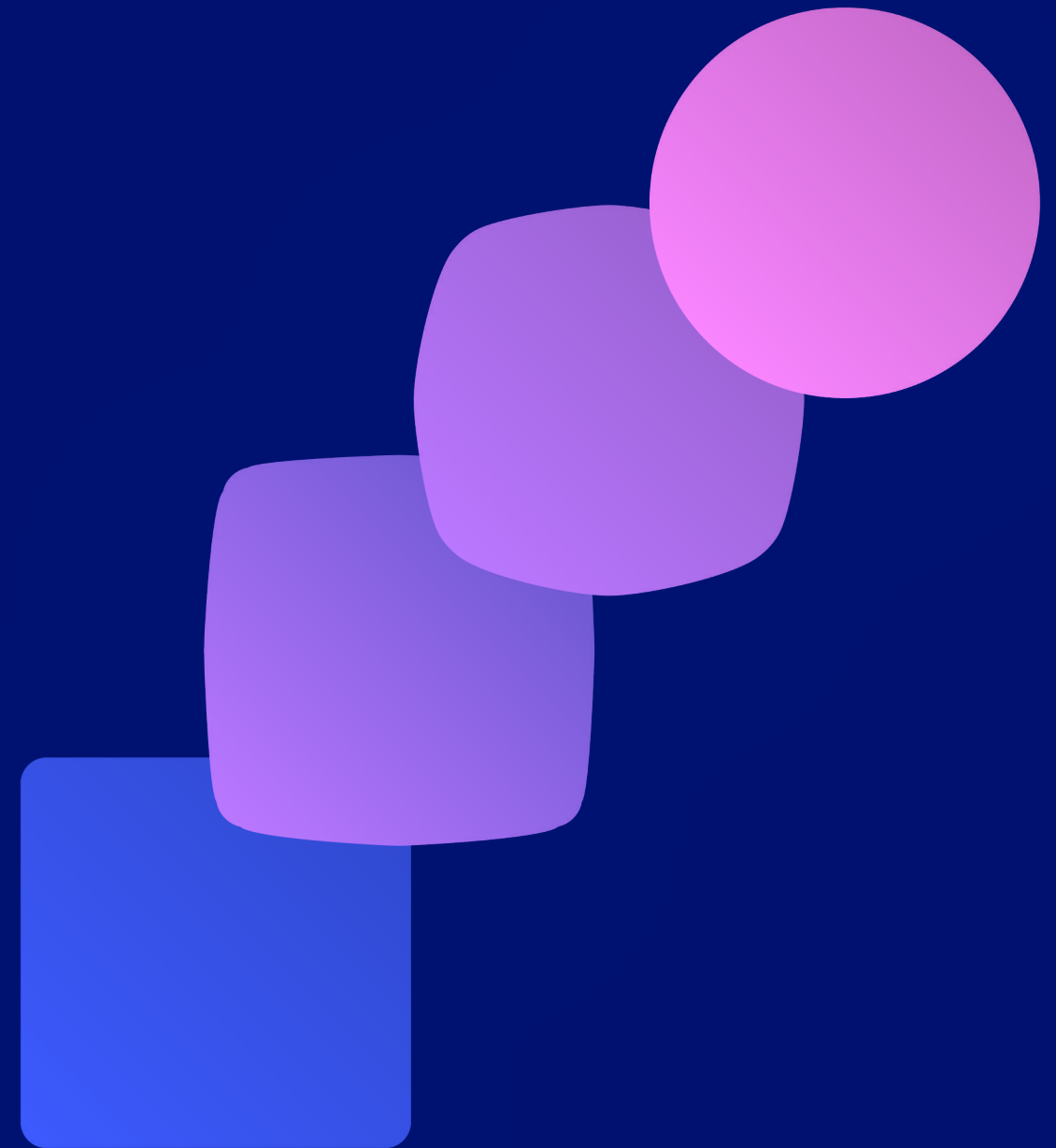**Reflektive** | Aderant

HR Guide: Change Management for Performance Programs

Learn how to successfully plan and launch new performance programs with best practices from Aderant, a global technology company

Why Change Management Matters

HR teams are continuously evolving their approach to people processes. From enhancing engagement surveys to adopting new goal methodologies, HR professionals are quite often the drivers of organizational change.

However, it can sometimes be challenging to achieve your desired results! To accomplish strategic objectives - such as improving productivity or boosting retention - it takes a thoughtful **change management strategy**. By aligning on the key objectives of your new performance program, and developing training and communications plans to drive new employee behaviors, HR teams are much more likely to hit their goals.

The below report includes a step-by-step plan to implement new processes. You'll also learn change management best practices from Reflektive customer Aderant. By empowering and enabling all stakeholders, HR teams can help their organizations move forward. Per Henry David Thoreau, "Things do not change; we change."

Table of Contents

1. Define Your Business Outcomes

Before getting started on your change management plan, identify your high-level business objectives. These are meaningful goals that support your company. Common goals for Reflektive customers include "decreasing attrition" and "improving productivity", which ultimately support the company's overall growth.

HR professionals also benefit from having a good handle on leading measures and key performance indicators (KPIs) that you can report on regularly. As such, we also recommend defining secondary objectives that support your primary goals. Milestones around employee behaviors, such as completing performance reviews, entering goals, and providing feedback, will help you measure progress and serve as KPIs on your performance journey.

Aderant, an Atlanta-based software company, was looking to accomplish the following goals for their performance program:

Aderant's Primary Objective
Improve employee engagement

Aderant's Secondary Objective
Drive career development with consistent communication and feedback from managers

Stephanie Buback, Global HR Director, knew that the right performance programs and the right technology could help her achieve these key objectives. To boost engagement and help employees grow their careers, she used Reflektive's check-ins and goals solutions. These products would help managers and employees stay aligned and provide continuous feedback.

But Stephanie knew that changing manager and employee behaviors would not happen overnight. She developed a comprehensive change management plan that would drive the success of Aderant's people programs.

Reflektive Reviews and Check-Ins

2. Keys to Success

Regardless of the specific program you're launching, you'll need the following pieces to plan and execute a successful change management strategy:

- **Executive buy-in**, to create momentum around your program and get stakeholders involved

- **A working team**, to bring your program to life and drive excitement at your company

- **A performance calendar**, to visualize the major milestones that you're working towards

- **A launch plan**, to guide your week-by-week activities

- **Weekly meetings**, to stay on top of key workstreams

3. Drive Executive Buy-In

Getting approval on your new performance program takes some planning. Schedule time with executives, and create a presentation with a clear narrative on why your program is important and how it supports key organizational objectives. We recommend including the following:

- **Key company-wide goal(s)** that you're looking to support

- **Internal data** that indicates areas of opportunity

- **External data** showcasing the value of the performance program

- **Key objectives** you're looking to accomplish with your program

- **Details and milestones** on the program

- **Resources** needed to be successful

4. Identify Key Roles to Drive Change

Since organizational change can't be accomplished by one individual, you'll need to identify key stakeholders to support you in this journey. They'll help you get organizational buy-in, encourage new behaviors, and take on some of the workload!

BUILDING SUPPORT

Prior to engaging with colleagues, we recommend you check out these best practices from the Prosci ADKAR® Model.

They shed light on how you can motivate others to participate in a change.

Key Roles to Fill

Sponsor: A senior executive in your company can drive your initiative forward by procuring budget and resources, gaining buy-in, and navigating any conflicts that may arise. A sponsor from a non-HR team (e.g., Finance, Marketing) also showcases the company-wide importance of the program.

Program Team: A cross-functional group of people (e.g., managers, department heads, HRBP's) that are enthusiastic about your program, and can model key behaviors for your workforce. They help ensure that your goals are met, and drive continuous improvements to your program based on their learnings.

Program Lead: An individual (generally an HR professional) will do the heavy lifting to bring your program to life. This stakeholder leads trainings, develops communications, and reports on the program's outcomes.

4. Identify Key Roles to Drive Change (Cont.)

Once your team has been formalized, **communicate your expectations** to teammates on deliverables and the anticipated time commitment. You can drive even more visibility by announcing your performance program team at your next company-wide meeting! To align and engage your team, set up meetings to plan, check progress, and debrief on results and key learnings.

5. Develop Your Annual Calendar

With your objectives and team in place, it's time to get your program going! The first step is to craft your annual performance management calendar. Think through the activities you want to focus on throughout the year, and the ideal timing for each activity. We've included Reflektive's recommended performance management calendar on the right.

2020 Performance Management Calendar

	Q1			Q2			Q3			Q4		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Performance												
Company Goal Setting	Set Annual Goals											
Employee Goal Setting		Set Quarterly Goals		Set Quarterly Goals			Set Quarterly Goals			Set Quarterly Goals		
Employee Development Goals		Set Annual Development		Refresh Development			Refresh Development			Refresh Development		
Goal Progress	Monitor Progress (monthly)											
Feedback	Continuous feedback with set checkpoints (ongoing)											
Coaching	Coaching 1:1s (weekly)											
Reviews & Check-ins	Annual Review			Q1 Check-in			360 Review			Q3 Check-in		
Calibration		Calibration										
Merit			Merit Planning									
Engagement												
Recognition	Real-time recognition (ongoing)											
Engagement Surveys				Annual Survey			Pulse Survey			Pulse Survey		
Onboarding/Exit Surveys	Onboarding & Exit Surveys (ongoing)											

5. Develop Your Annual Calendar (Cont.)

Get Buy-In on Your Calendar

Once your draft calendar is completed, share it with your key change management stakeholders so they can provide feedback on timing and activities. You can include details on activities such as trainings and stages of the review cycle too.

Once your stakeholders are on-board with your annual performance management calendar, schedule some time with the leadership team to share specific milestones and answer any questions they may have.

Aderant's 2020 Performance Management Calendar

Date	Milestone Title	Description or Activity
1/27/2020	New Process Training	Move to Continual Performance Management
2/1/2020	Reflektive System WebEx Training	Training 1st week of February
2/1/2020	2019 Employee Self Reviews	2/1- 2/14 Timeline for Self Review Completion
2/15/2020	2019 Manager Reviews	2/15/-3/6 Manager Review Completion
3/9/2020	2019 Review Meetings	3/9-3/31 Review Meetings occuring
4/1/2020	Goals	4/1-4/15 Goals entered into Reflektive
5/1/2020	1:1 Performance Conversation	5/1/-5/15 System initiated 1:1 Conversation
7/1/2020	1:1 Performance Conversation	7/1/-7/15 System initiated 1:1 Conversation
9/1/2020	1:1 Performance Conversation	9/1/-9/15 System initiated 1:1 Conversation
10/1/2020	Goal Check-In	10/1-10/15 Goal Check-in through Reflektive
11/1/2020	1:1 Performance Conversation	11/1/-11/15 System initiated 1:1 Conversation

6. Execute your Strategy

Develop Your Launch Plan

Now that your annual performance management calendar is finalized, you can start executing on your change management strategy. To help guide your week-by-week activities, we recommend creating a launch plan with milestones for testing, training, and communications. Take a look at Aderant's launch plan on the right.

Aderant's Launch Plan

Date	Milestone Title	Description or Activity
12/16/2019	Reflektive Kickoff Meeting	Discovery
12/17/2019	Set Benchmarks	Determine if go forward Performance Checkins will be monthly or quarterly
12/18/2019	Reflektive Configuration Call	Configuration
12/20/2019	Review module trainings	Training
12/23/2019	Create sample data & Run tests	This sample text is a list of tests to be done during this phase. Test 1- Employee 2019 Annual Review Test 2 - Employee Check in template Test 3 - Goal Setting
12/26/2019	Cornerstone Data Dump	Figure out plan for Cornerstone performance records
12/26/2019	Review Review Build	Review 2019 performance build
12/30/2019	Create Communication	Be creative with your own ideas and start creating your own infographic outline.
1/6/2020	Create Training	Draft Kickoff Training
1/13/2020	Finalize Training	Finalize Kickoff Training
1/14/2020	Upload Employee Details	Upload UltiPro Data to Reflektive
1/20/2020	Audit Employee Details	Review and confirm correct employee data
1/27/2020	Launch	Launch Performance Reviews and Goals
1/27/2020	Conduct Reflektive Training	Kickoff Training Session
2/3/2020	Conduct Reflektive Remote Training	Conduct Webex Training Sessions
2/10/2020	Prepare for rollout of Feedback & Goals	Prepare for rollout
3/2/2020	Create Communication for Feedback & Goals	Draft Communication for Additional Portals
3/16/2020	Send Communication for Feedback & Goals	Send Communication
4/1/2020	Rollout of Feedback & Goals	Launch Feedback & Goals

Aderant Best Practices

Manager Training Content

Aderant developed a flow for their manager training sessions to drive excitement and adoption of their new performance management approach. Here are their best practices for manager training content:

1. **Start with the "why"**
   Aderant leads with the benefits of continual performance conversations, such as aligning teams and departments and improving employee engagement

2. **Describe the manager vs the coach mindset**
   To foster a development-focused culture, Aderant educates managers on the definition of a coach, and includes best practices such as "leading by example" and "highlighting successes"

3. **Provide specific examples for 1:1 and feedback conversations**
   Aderant included questions managers can ask for different conversation topics, including "Goals", "Performance", and "Development".

See Appendix for Aderant manager training slides

6. Execute your Strategy (Cont.)

Finalize and Act on your Launch Plan

Next, we recommend that you share your finalized launch plan with your change management stakeholders and leadership. This helps in a couple of different ways:

• It reiterates your performance management calendar

• It creates buy-in for your launch activities: leaders, managers, and HR teammates are more likely to promote your training sessions, and follow-up on your communications

Once you've incorporated feedback from stakeholders into your launch plan, schedule weekly meetings to share progress, blockers, and any changes to your launch plan. For these weekly meetings:

• Send out an agenda a few days before so colleagues know what will be covered

• Rotate attendance as needed so the right people are present for each meeting

• You can include other stakeholders as "optional attendance" if you wish!

6. Execute your Strategy (Cont.)

Launch your Programs

Now is time for the exciting part: launching your performance management programs! To guide employees through the new processes, Aderant crafted how-to documentation and communications for their workforce. They partnered with Reflektive to build their content. Per Stephanie, "Our Reflektive Customer Success Manager gave great guidance on the best ways to drive awareness and excitement for our new programs. We also leveraged Reflektive's Knowledge Center for their very helpful training content." On the following page is how-to documentation that Aderant shared with their employees.

Aderant How-To Documentation

Reflektive Feedback

Reflektive Feedback

Step 1- From the home page select the Feedback icon in the top right corner.
On this screen will be Feedback request you have both sent and feedback that has been requested of you.

Step 2- Select who you would like to receive Feedback about: yourself, your team, someone else.

Reflektive Check-Ins

Completing a Check-In in Reflektive

Check-ins are intended for employees to fill out as a way to prompt a conversation with managers regarding current goals, opportunities, and similar topics. Please follow the below steps to get started.

Login to Reflektive

On the home page select Go next to the May 2020 Check-in.

Select Check-In on the next page to launch check in questions.

Once you have completed all 3 questions be sure to hit submit. Please note that once this is done you will no longer be able to edit your responses and they will be shared with your manager. Your manager will then make notes in the system during your 1:1 check-in conversation and submit results to complete this 1st continual performance management requirement.

7. Launch your Programs

Aderant Template: Goals Launch

Aderant sent the following communication to employees regarding their new performance management process for goals.

Aderant Team,

Now that we are wrapping up our performance reviews, it's time to start thinking about your 2020 goals. For those still completing the review process, please note the deadline is March 31st.

Understanding that the goals you set for today might be different than the goals you anticipated at the beginning of this year. We encourage you to think about productive short, and long term goals. The good news is our new performance management platform allows for agility in goal planning.

Reminders:

• Goals- make a minimum of 3 SMART goals (specific, measurable, achievable, relevant, and timely).

• You choose if you make your goals public or private. If you want to align goals to company goals, they must be public or shared.

• When entering goals you will select one of the following categories that align with the company goals (Client, Growth, or People).

In an effort to help you prepare for goal setting Jessica Segal, Global Learning & Development Manager, will be conducting WebEx training over the next several weeks. This training will review how goal setting works between individuals and their manager as well as navigating Reflektive to enter your goals. If you are unable to attend, there will be a recording available for review after the sessions are complete.

Be on the lookout for invites for training on goal setting.

TASK	TIMING
Review Meetings	March 9-31
Create and enter 2020 goals into Reflektive	April 1-22
System initiated 1:1 sessions for managers/employees	May 1-22

7. Launch your Programs (Cont.)

Aderant Template: Check-Ins Launch

Aderant sent the following communication to employees regarding their upcoming check-in cycle, including training sessions and check-in questions.

All,

The July/August 2020 Check-In is now available for you to access. You will have 2 months to complete before the next check-in cycle launches on September 1st. Remember you can edit the goals you have already created to take into account any changes that may have occurred since the last check-in.

We have also conducted a number of employee sessions requesting feedback on Reflektive and usage. Based on the feedback received, HR and Training are putting together Best Practices sessions. This is forthcoming and will include such topics as:

- Using Reflektive- Required and Optional Features
- Team Goal Creation How To
- Goal Maintenance and Tracking to Completion
- Hashtags
- Recognition

Below are the 3 questions for July/August 2020 check-in now available in Reflektive (Due by August 31st):
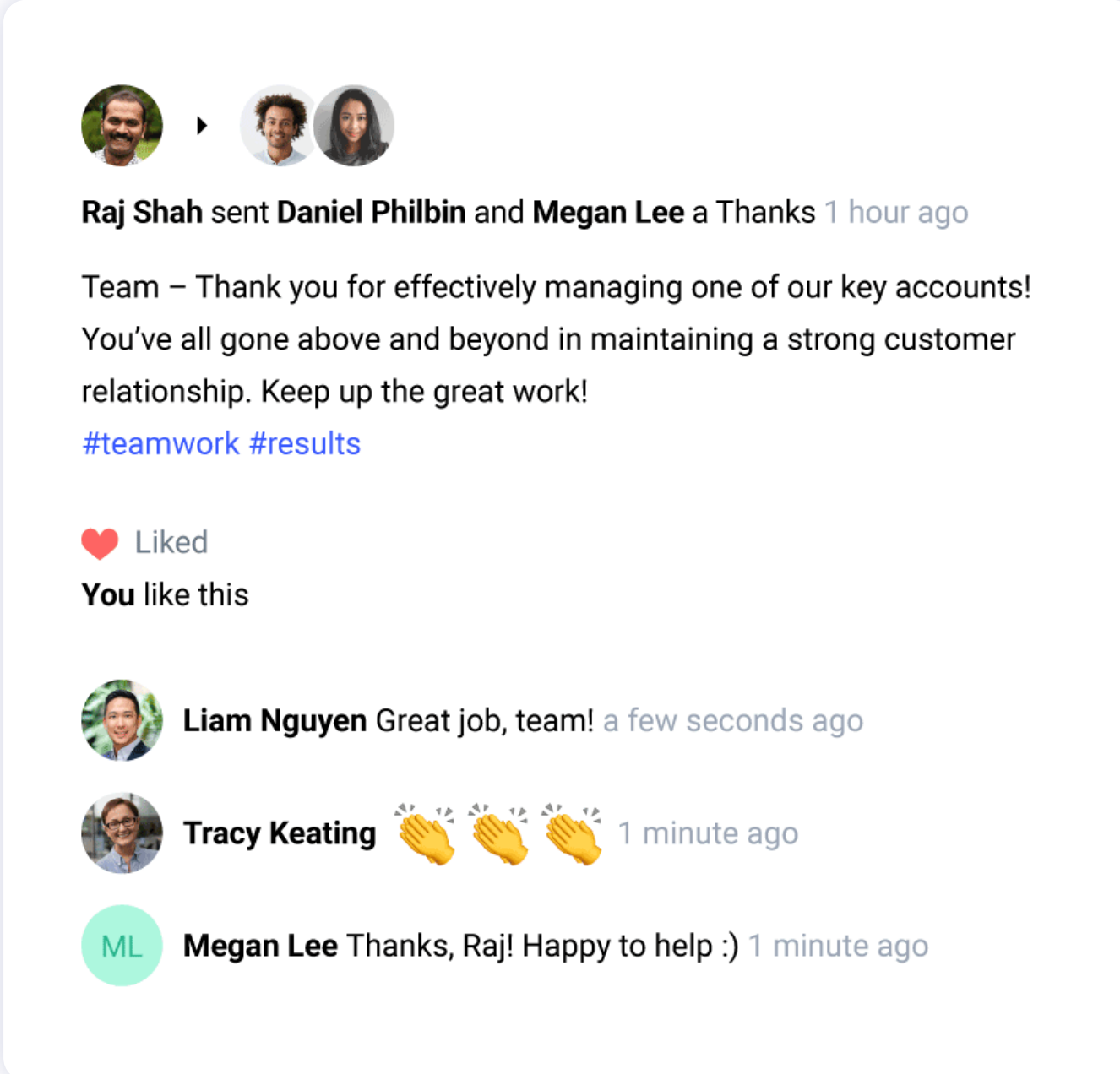
- How are you progressing in working towards the completion of your current goals?
- What are some upcoming tasks that you will be working on and do you have the tools to be successful?
- In the next 6 months, what do you plan to do for personal development?

8. Post-Launch Planning

Celebrate wins publicly!

After you've launched your performance program and hit a milestone, celebrate! Key milestones could be hitting 100% performance review completion, or when all employees have created goals. If there are certain individuals or teams who have contributed meaningfully to wins, share public recognition on what they did, and how they went above and beyond. Rewarding teams or departments for hitting milestones first also motivates employees. Providing points, gift cards, or charitable donations are great ways to encourage friendly competition among employees!

Raj Shah sent **Daniel Philbin** and **Megan Lee** a Thanks 1 hour ago

Team – Thank you for effectively managing one of our key accounts! You've all gone above and beyond in maintaining a strong customer relationship. Keep up the great work!

#teamwork #results

❤️ Liked

You like this

Liam Nguyen Great job, team! a few seconds ago

Tracy Keating 👏 👏 👏 1 minute ago

ML **Megan Lee** Thanks, Raj! Happy to help :) 1 minute ago

Reflektive Recognition

8. Post-Launch Planning (Cont.)

Make Changes Stick

While it's great to see engagement and adoption during the launch of your performance program, getting habits to stick can be more challenging. And it's the continued behaviors that really drive change. For instance, having consistent 1:1s with direct reports can increase employee retention by over 3X. So, what can HR teams do to drive long-term behavior change? We recommend three strategies:

1. **Build performance management into new hire training:** Instilling best practices is easiest from the get-go! Educate new hires on the importance of performance management, the programs that your company offers, and expected employee behaviors.

2. **Offer refresher trainings to employees:** Ensure that employees always have access to up-to-date training on their performance programs. If you're having a review cycle or goal-setting for the first time in several months, lead a training session to get employees comfortable with the objective, expectations, and technology.

3. **Communicate upcoming cycles and events:** Leverage effective communication channels for your company (e.g., email, Slack, All-Staff meetings) to educate them on upcoming performance management initiatives.

Finally, to measure the effectiveness your change management plan, ask yourself the following questions:

- Are employees **aware** of this new program and why it's important?

- Did employees build new **skills** with this program?

- Did employees create new **habits?**

- Was progress made on our **company-wide objectives?**

Regardless of your answers to these questions, remember that performance management is not linear — it's an ongoing process that you can continue to improve! Take every experience as a learning opportunity in your performance management journey.

Appendix

Aderant Manager Training Content

Why Continuous Feedback?

What Does Continuous Feedback Look Like?
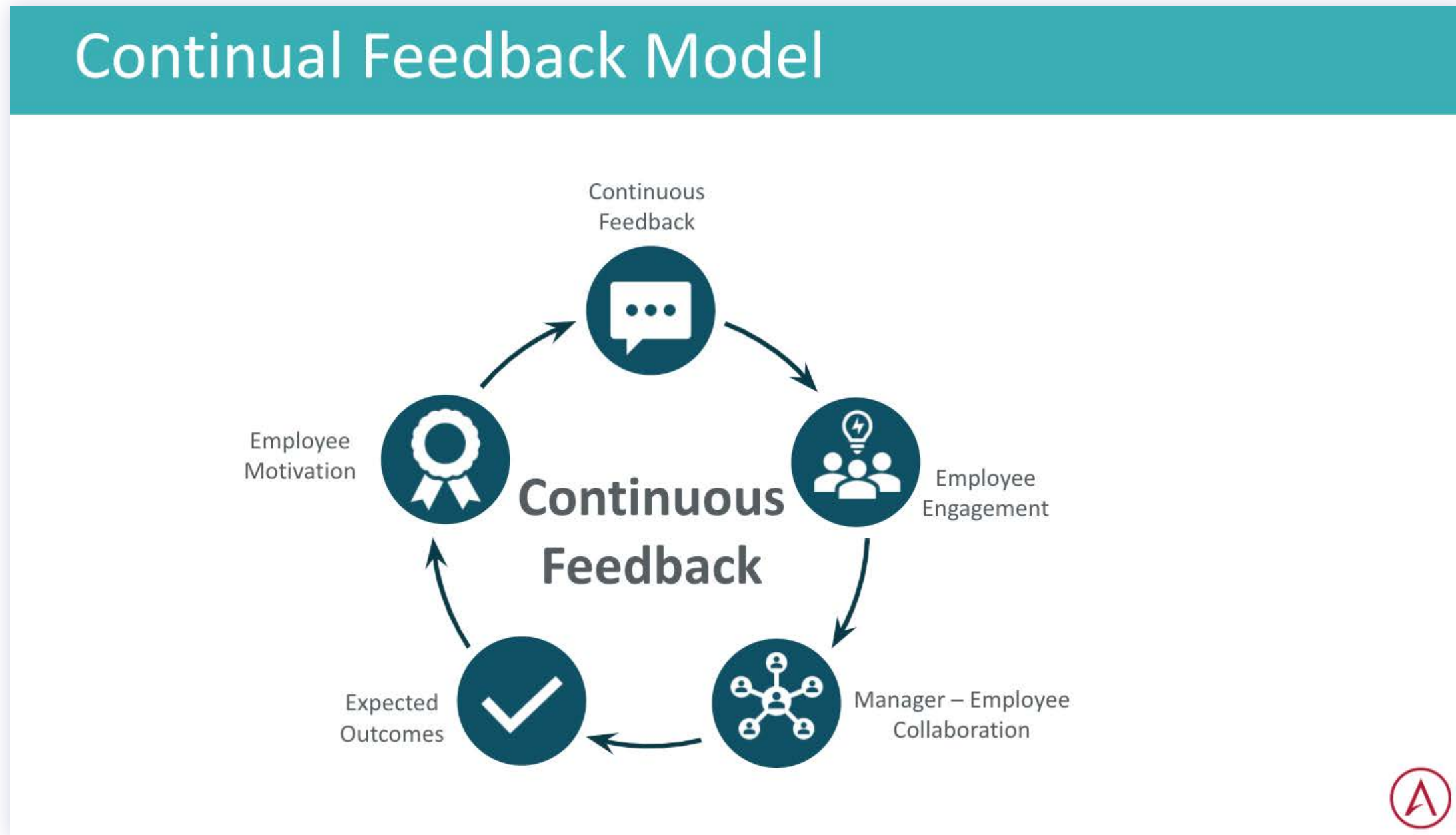
Manager vs. Coach Mindset
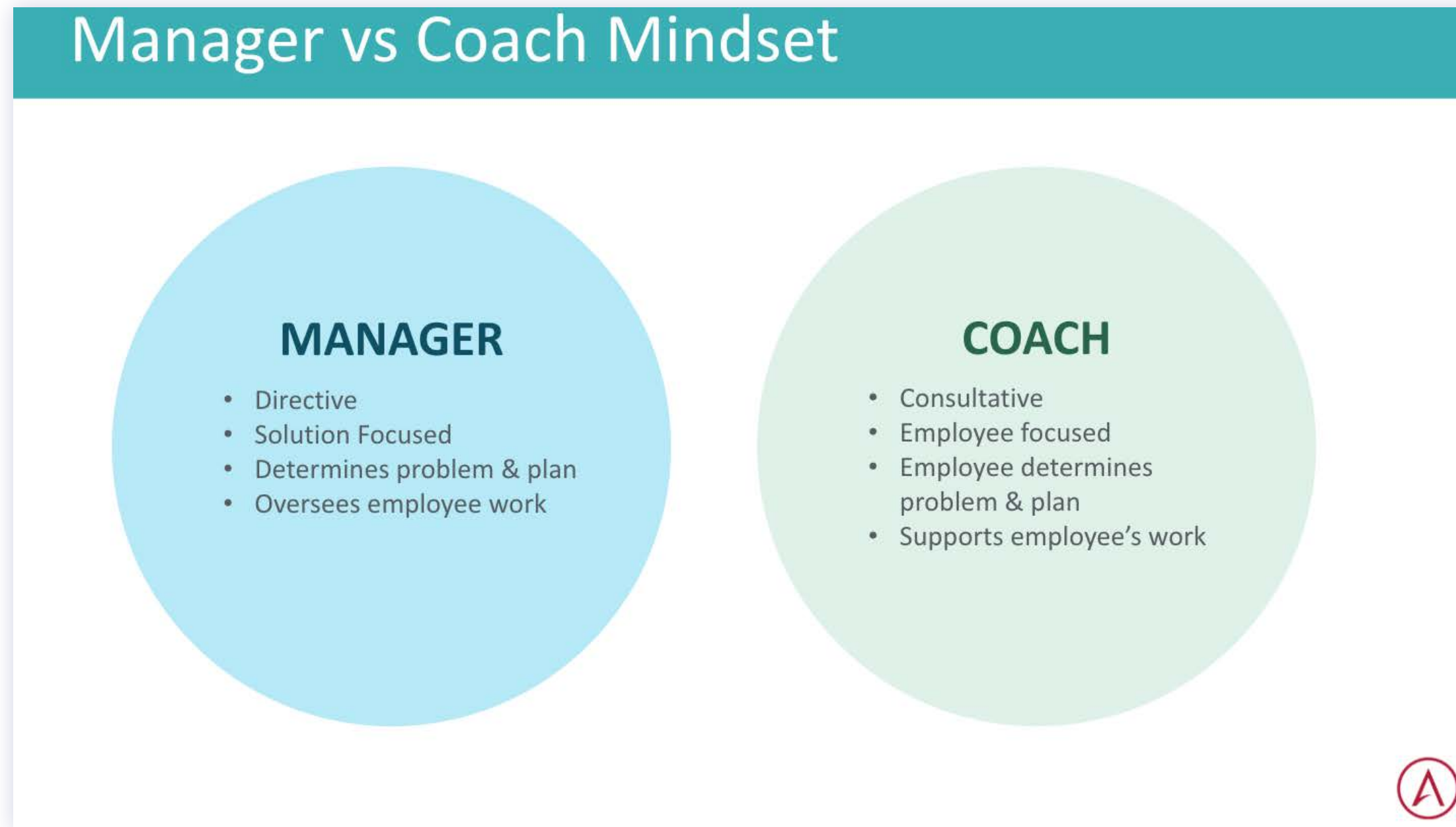
The Future State of Continuous Feedback
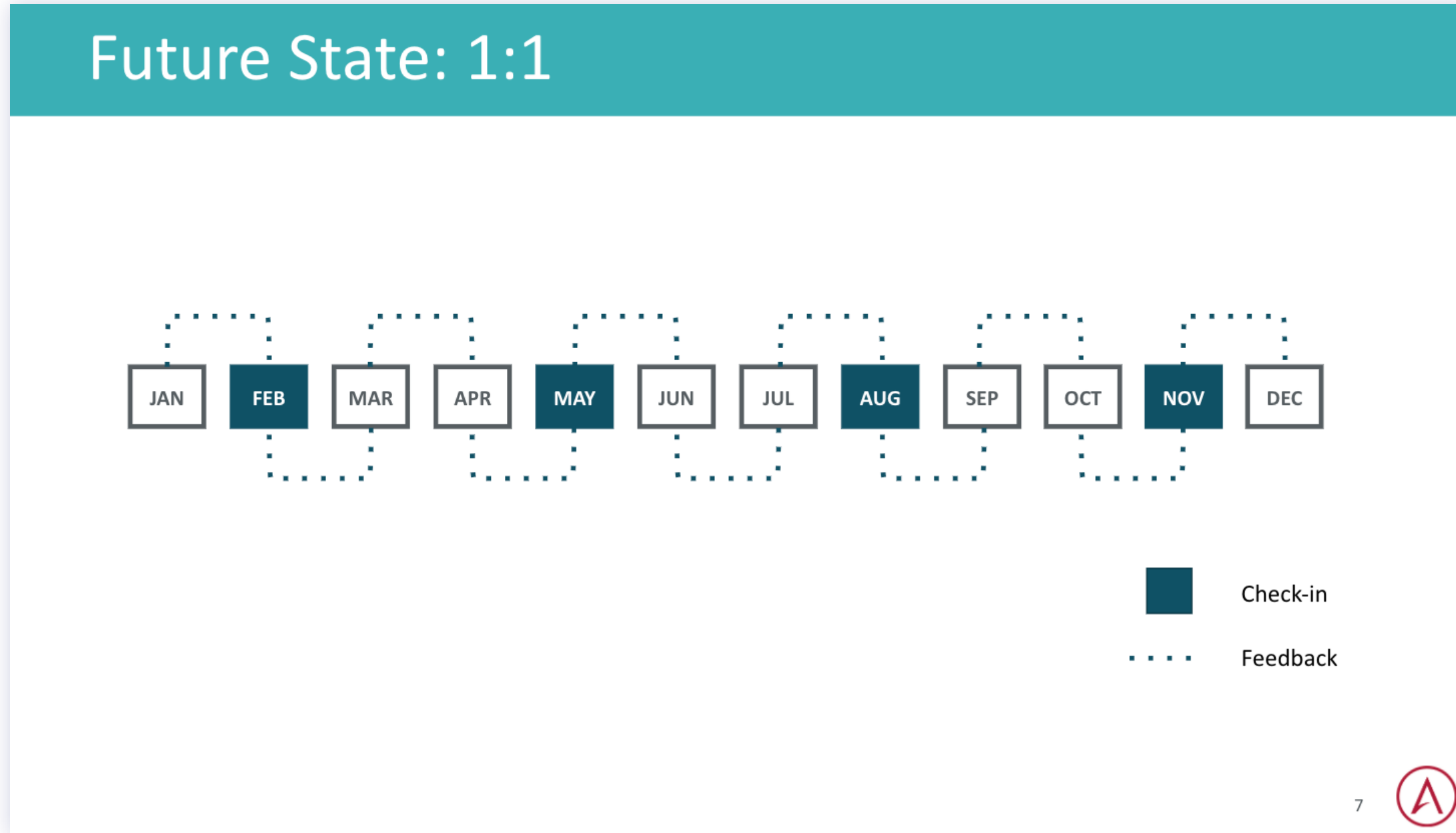
The Future State of Continuous Feedback

Future State

- Both employee and manager invested in career next steps

- Discusses development opportunities openly

- Allows for more just in time training and development

- Future focused rather than today and one next step focused.

9

Best Practices for Continuous Feedback

Individual Conversations How To's

- Communicate Early and Often

- Understand and Appreciate Strengths

- Provide Constructive Feedback

- Create Trust

- Facilitate Insight

- Set Goals together

- How do I fit this into my normal 1:1 scheduled meeting?

Best Practices for Continuous Feedback