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# WHITE PAPER USER MANUAL FOR – PERFORMANCE MANAGEMENT

## Module – Human Resource

**Author** : Sourav Suman  
**Creation Date** : 18-Oct-2024  
**Last Updated** : 18-Oct-2024  
**Version** : 1.0

## Overview:

A performance management system (PMS) is a framework used by organizations to assess, monitor, and improve employee performance. It aligns individual performance with the organization's goals and facilitates ongoing feedback and development. Key components include:

1. **Goal Setting:** Establishing clear, measurable objectives for employees that align with organizational goals.
2. **Continuous Feedback:** Providing regular feedback to employees about their performance, rather than relying solely on annual reviews.
3. **Performance Appraisals:** Conducting formal evaluations at set intervals to assess employee performance against established goals.
4. **Development Plans:** Identifying areas for improvement and creating training or development plans to help employees grow.
5. **Documentation:** Keeping records of performance discussions, feedback, and appraisals for accountability and future reference.
6. **Integration with Compensation:** Linking performance outcomes to rewards, promotions, and salary adjustments to motivate employees.

A well-implemented performance management system enhances employee engagement, fosters a culture of accountability, and drives overall organizational success.

## Why it is used?

A performance management system (PMS) is used for several important reasons:

1. **Alignment of Goals:** Ensures that individual employee goals align with organizational objectives, promoting a unified direction.
2. **Performance Improvement:** Helps identify strengths and areas for improvement, enabling targeted development and support.
3. **Continuous Feedback:** Facilitates ongoing communication, allowing employees to receive timely feedback and adjust their performance accordingly.
4. **Employee Engagement:** Engages employees by involving them in goal setting and providing recognition for their achievements.
5. **Talent Development:** Supports career growth through personalized development plans and training opportunities.
6. **Accountability:** Establishes clear expectations and accountability for performance, helping to drive results.
7. **Informed Decision-Making:** Provides data and insights that inform promotions, compensation, and succession planning.

8. **Organizational Culture:** Fosters a culture of performance and continuous improvement, enhancing overall organizational effectiveness.

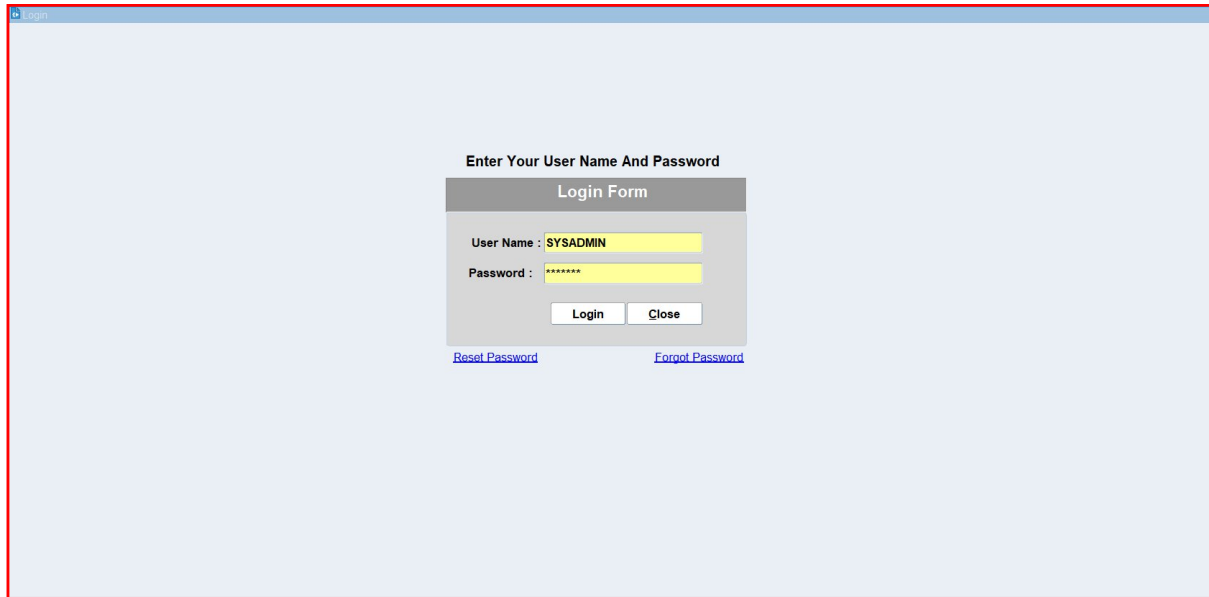
Overall, a PMS helps create a motivated workforce and drives better business outcomes.

### When it used?

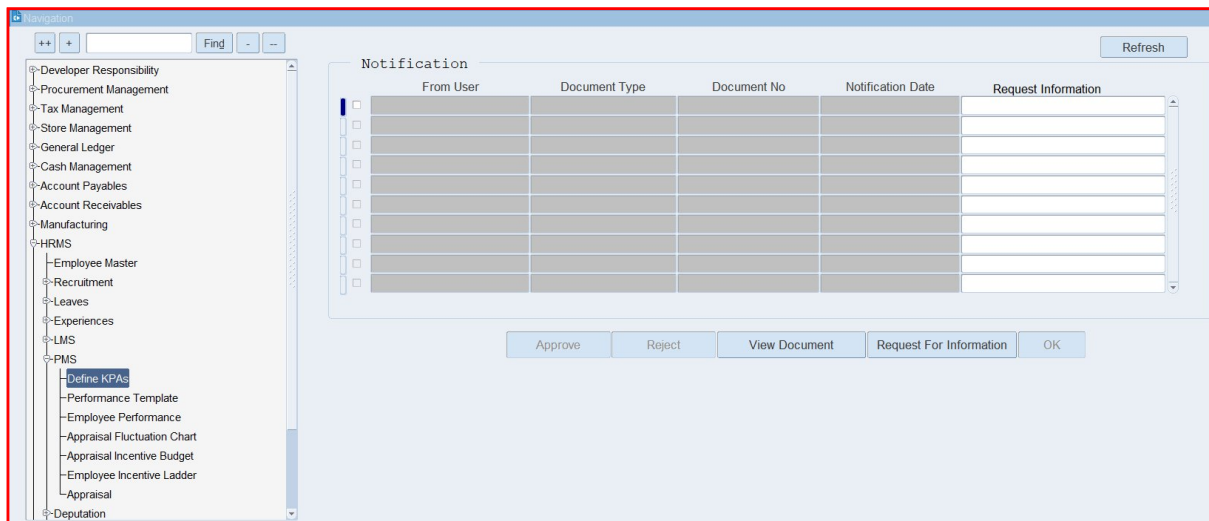
A performance management system (PMS) is used throughout various stages of the employee lifecycle and organizational processes, including:

1. **Onboarding:** Introduced during employee onboarding to set expectations and goals from the start.
2. **Goal Setting Periods:** Typically, at the beginning of performance cycles (annually or quarterly) to establish objectives.
3. **Regular Check-Ins:** Ongoing throughout the year for continuous feedback and coaching, often in monthly or quarterly meetings.
4. **Performance Appraisal Cycles:** Used during formal evaluations, which may occur annually or biannually, to assess progress against goals.
5. **Training and Development Planning:** During development discussions to identify skill gaps and training needs.
6. **Promotions and Compensation Reviews:** Applied when making decisions about promotions, raises, or bonuses based on performance.
7. **Succession Planning:** Used to identify and develop potential leaders within the organization.

In summary, a PMS is a continuous process that supports employee development and organizational goals at various key moments throughout the year.



Put the login details and login



Click on Define KPA's

### KPA (Key Performance Area)

KPA stands for Key Performance Area. It refers to specific areas or aspects of performance that are crucial for the success of an organization or a project. KPAs help in assessing how well individuals, teams, or the organization as a whole are achieving their objectives.

Define Key Performance Area(KPA)

KPA Name

Description

Performance Measure

Performance Measure	Description	Start Date	End Date	Key Task
				Key Task
				Key Task
				Key Task
				Key Task
				Key Task
				Key Task
				Key Task
				Key Task
				Key Task
				Key Task

Assignment

Put the KPA Name & Description.

Define Key Performance Area(KPA)

KPA Name

Description

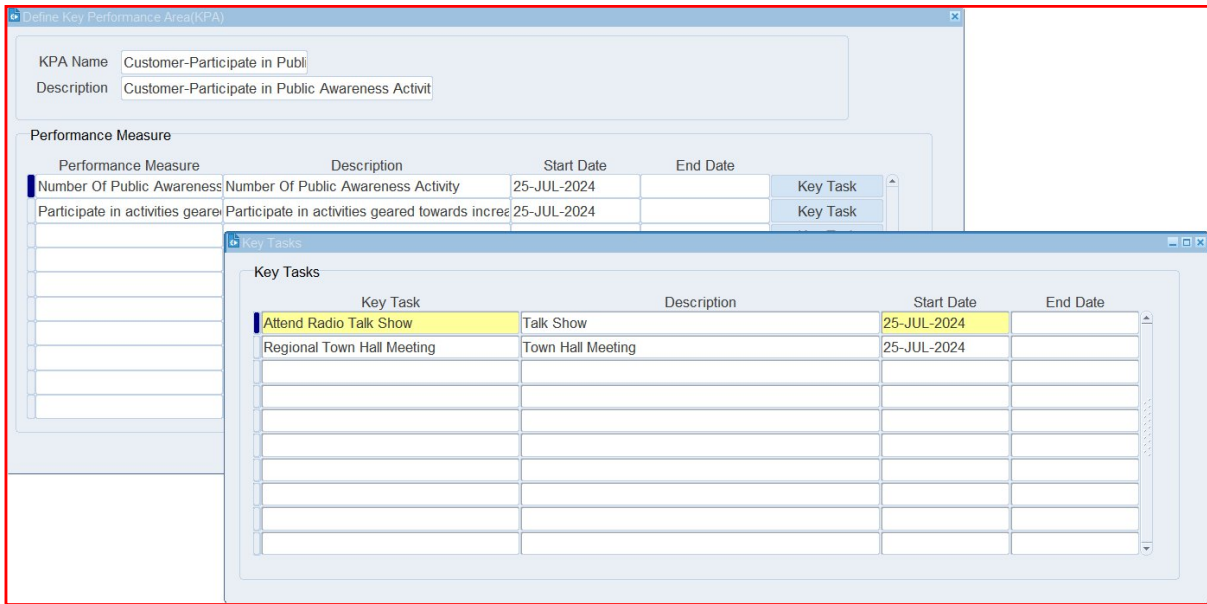
Performance Measure

Performance Measure	Description	Start Date	End Date	Key Task
Number Of Public Awareness	Number Of Public Awareness Activity	25-JUL-2024		Key Task
Participate in activities geared	Participate in activities geared towards increas	25-JUL-2024		Key Task
				Key Task
				Key Task
				Key Task
				Key Task
				Key Task
				Key Task
				Key Task
				Key Task

Assignment

Put the Performance Measure manually as per requirement & put the start date.

Click on Key Task.



**Define Key Performance Area(KPA)**

KPA Name: Customer-Participate in Publi  
Description: Customer-Participate in Public Awareness Activit

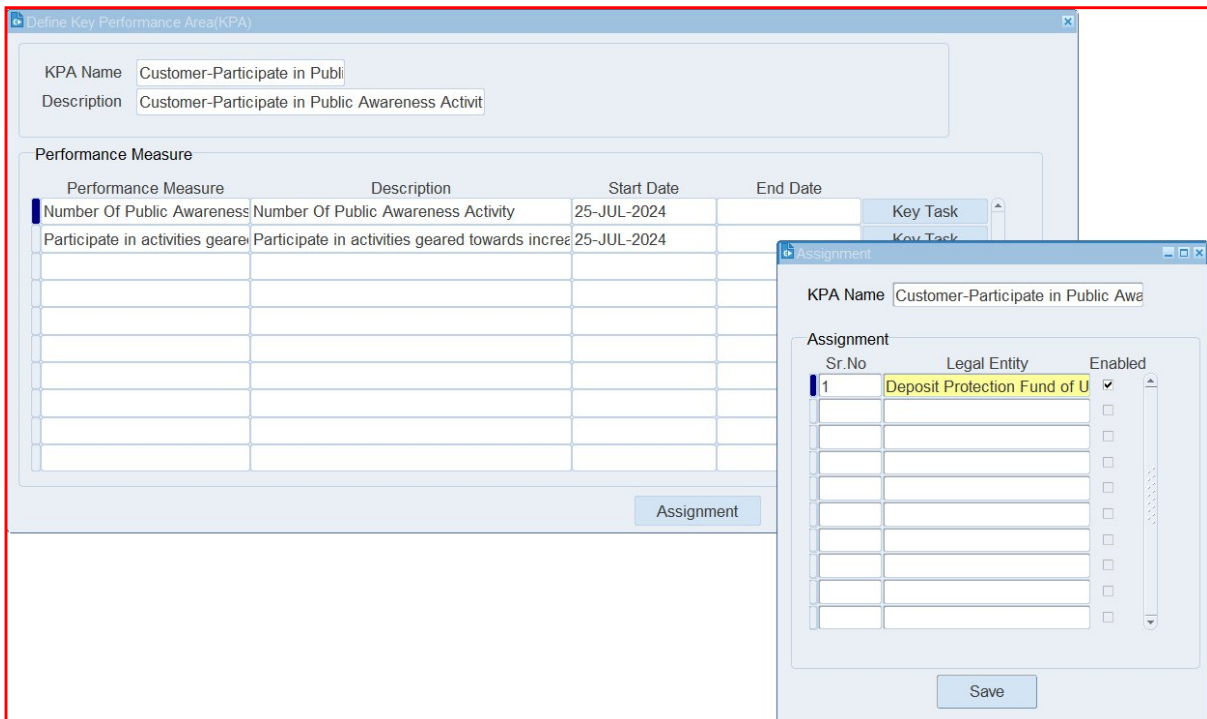
**Performance Measure**

Performance Measure	Description	Start Date	End Date	Key Task
Number Of Public Awareness	Number Of Public Awareness Activity	25-JUL-2024		Key Task
Participate in activities geared	Participate in activities geared towards incre	25-JUL-2024		Key Task

**Key Tasks**

Key Task	Description	Start Date	End Date
Attend Radio Talk Show	Talk Show	25-JUL-2024	
Regional Town Hall Meeting	Town Hall Meeting	25-JUL-2024	

Put the Key Task names.



**Define Key Performance Area(KPA)**

KPA Name: Customer-Participate in Publi  
Description: Customer-Participate in Public Awareness Activit

**Performance Measure**

Performance Measure	Description	Start Date	End Date	Key Task
Number Of Public Awareness	Number Of Public Awareness Activity	25-JUL-2024		Key Task
Participate in activities geared	Participate in activities geared towards incre	25-JUL-2024		Key Task

**Assignment**

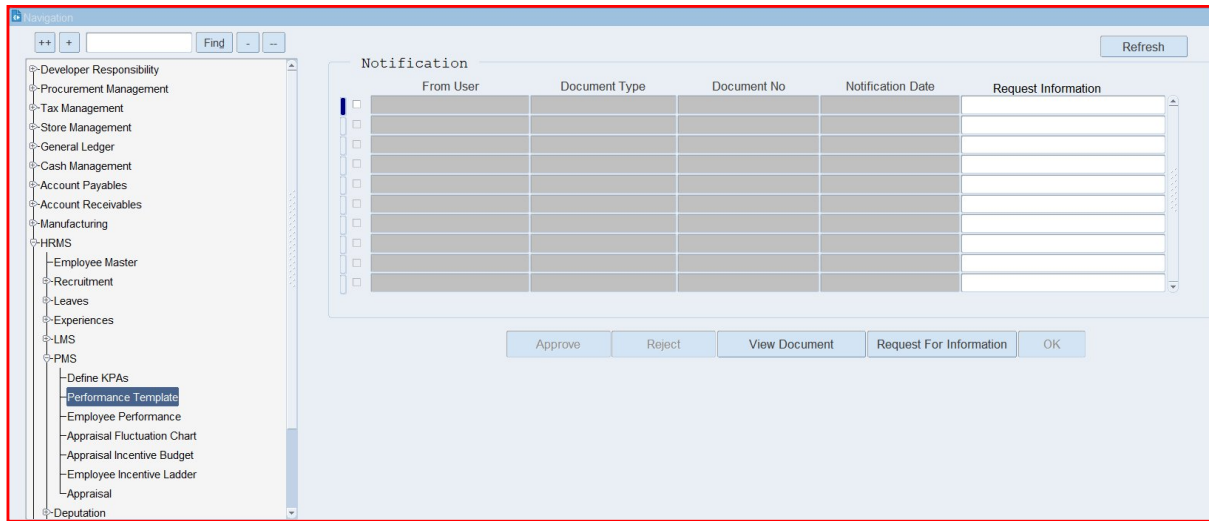
KPA Name: Customer-Participate in Public Awa

Sr.No	Legal Entity	Enabled
1	Deposit Protection Fund of U	<input checked="" type="checkbox"/>

Assignment

Save

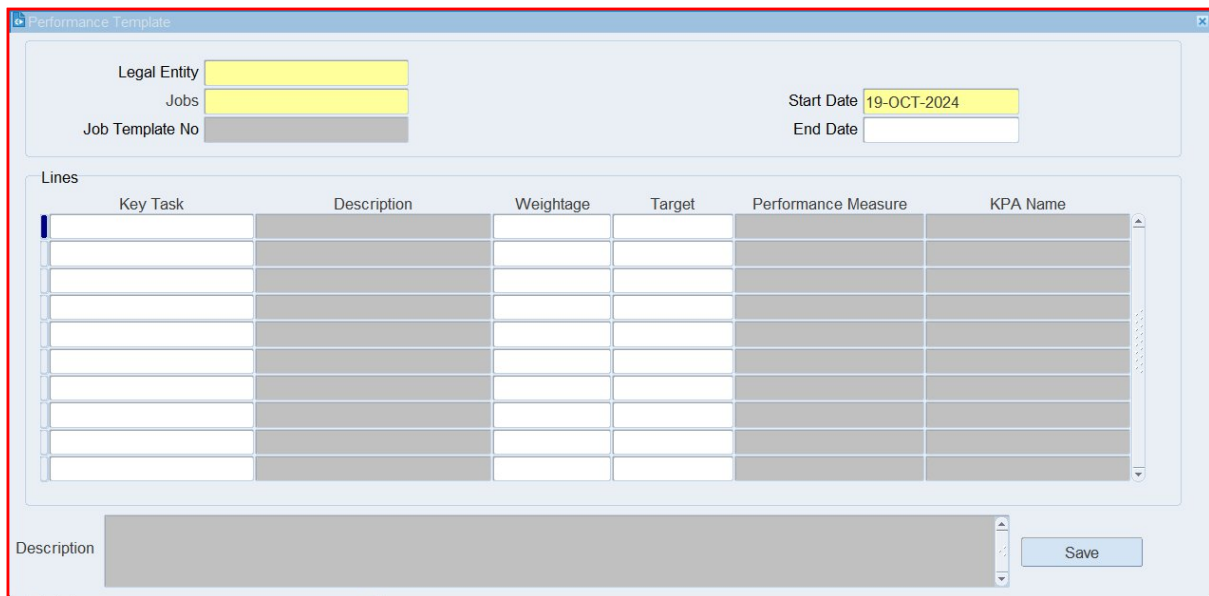
Click on Assignment. Then put the Legal Entity. Click on save.



Click on Performance Template.

What is a performance template?

A performance template is a structured document used to evaluate and track performance metrics in an organization. It standardizes assessments for various purposes, such as employee reviews, project management, and business performance.



Put the mandatory details like Legal Entity and Jobs.

Performance Template

Legal Entity **Deposit Protection Fund of U**  
 Jobs **Director - Communications**  
 Job Template No **103**

Start Date **25-JUL-2024**  
 End Date

Key Task	Description	Weightage	Target	Performance Measure	KPA Name
Attend Radio Talk Show	Talk Show	33	4	Number Of Public Awarene	Customer-Participate in Publi
Regional Town Hall Meeting	Town Hall Meeting	33	4	Number Of Public Awarene	Customer-Participate in Publi
High quality service delivery	Technically control and ensure hig	34		Utilization	Service Delivery

Description

Save

Put the target & click on save.

Navigation

- Register DB Table
- DFP
- User Dashboard
- Procurement Management
- Tax Management
- Store Management
- General Ledger
- Cash Management
- Account Payables
- Account Receivables
- Manufacturing
- HRMS
  - Employee Master
  - Recruitment
  - Leaves
  - Experiences
  - LMS
  - PMS
  - Define KPAs
  - Performance Template
  - Employee Performance**
  - Appraisal Fluctuation Chart
  - Appraisal Incentive Budget
  - Employee Incentive Ladder

Notification

	From User	Document Type	Document No	Notification Date	Request Information
<input type="checkbox"/>					
<input type="checkbox"/>					
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<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Approve Reject View Document Request For Information OK

Click on Employee Performance.

Employee Performance

Legal Entity  Employee Name  PMS Status    
 Performance Period  Performance No  Total Score

Details

KPA	Performance Measure	Key Task	Description	Weightage	Target	Employee Score	Employee Comment	Supervisor Score	Supervisor Comment	Agreed Score	Remarks

Put the mandatory information like Legal Entity, Employee Name & Performance period.

Click on find.

Employee Performance

Legal Entity  Employee Name  PMS Status    
 Performance Period  Performance No  Total Score

Details

KPA	Performance Measure	Key Task	Description	Weightage	Target	Employee Score	Employee Comment	Supervisor Score	Supervisor Comment	Agreed Score	Remarks
Customer-Participat	Number Of Public Aw	Attend Radio Talk Show	Talk Show	33	4	9	Attend 4 Talk S				
Customer-Participat	Number Of Public Aw	Regional Town Hall Meeting	Town Hall Meeting	33	4	9	Attend Town ha				
Service Delivery	Utilization	High quality service delivery	Technically control and ensu	34		10	100%				

Here, put the Target & Employee score.

Employee Performance

Legal Entity  Employee Name  PMS Status    
 Performance Period  Performance No  Total Score

Details

KPA	Performance Measure	Key Task	Description	Weightage	Target	Employee Score	Employee Comment	Supervisor Score	Supervisor Comment	Agreed Score	Remarks
Customer-Participat	Number Of Public Aw	Attend Radio Talk Show	Talk Show	33	4	9	Attend 4 Talk S			8	
Customer-Participat	Number Of Public Aw	Regional Town Hall Meeting	Town Hall Meeting	33	4	9	Attend Town ha			8	
Service Delivery	Utilization	High quality service delivery	Technically control and ensu	34		10	100%			9	

Click on Send for approval to the supervisor for review and approval.

XX END XX