



OVERVIEW

ePerformance Trainer Guide
2009

Module: Overview

Module Total Time: 40 Minutes

Trainer Goal:

Provide an 'at-a glance' overview of the Georgia ePerformance Management Process

Trainer Flow:

- Introduction and Objectives
- Overview
- Changes to the new Georgia ePerformance
- Transitioning to ePerformance
- Four Phase Model
- Purpose
- Supporting Tools
- ePerformance System Flow
- General Timeline
- Exercise: Role of Manager and Employee in the General Timeline

Trainer Materials:

- Manager Guide
- Trainer Guide
- Appendix
- Easel Pad or Whiteboard
- Markers
- PowerPoint Slides

Manager Materials:

- Manager Guides for all participants
- 4-page Georgia ePerformance Management Process Job Aid

Overview

Trainer Notes:

This trainer role is to assist the HR community staff and State and Agency managers in delivering the critical components involved in planning, coaching, evaluating and recognizing successful performance competencies, goals and responsibilities.

Determine if agency timelines have been established and are approved for communication during the training. Prepare speaking points for “General Performance Management Process Timeline”.

- If yes, provide agency timelines to reach June-July annual evaluations.
- If no, explain that the agency is establishing the timeline and it will be communicated when available.

INTRODUCTION AND OBJECTIVES

SAY: Hello. Welcome to the Georgia ePerformance Management Process training.

REFER TO GUIDE: Module Objectives

SAY: At the end of this module, you will:

- Understand the changes in the Georgia ePerformance Management Process
- Learn the 4-Phase Model
- Preview the system process flow
- Review the process timeline

READ PPT: Overview

SAY: A project team was created with Nine Interagency HR Teams. The goal of the project team was to determine the needs and requirements for a new performance management system for the state.

SAY: The next slide represents the changes that occurred and it provides a comparison of the current process to the new and improved process.

TRANSITION



Georgia ePerformance is a systematic, integrated approach to performance management.

- Drives individual and organizational performance
- Promotes and supports the Governor's vision for Georgia being the "Best Managed State"
- Translates organizational goals to individual performance expectations
- Links an employee's performance expectations to the mission, vision, and goals of the agency and the State
- Articulates **WHAT** an employee needs to accomplish and **HOW** to accomplish these goals
- Provides a uniform PMP approach enterprise-wide



Changes to the New ePerformance

READ PPT: Changes to the New ePerformance

ASK: How can you (as the manager) benefit from the current plan? (Responses will vary)

SAY: There are many benefits to new ePerformance. They include:

- Measure employee performance based on accomplishment of goals
- Hold managers and employees accountable for results
- Provide managers with the skills and tools necessary to differentiate performance
- Develop a consistent Statewide process, system, and tools that are “fair, simple and easy to use

SAY: The next slide represents the enhancements to the performance management process. Follow along as we review the key points of differentiation.

TRANSITION

Transitioning to ePerformance

READ PPT: Transitioning to ePerformance

ASK: What are your initial thoughts to the process improvements? (Responses will vary).

SAY: Take a quick glance at your guide to review the key enhancements.

REFER TO GUIDE: Transitioning to ePerformance

SAY: Every enhancement listed will be covered in full detail throughout planning phase of the training. The 3 key enhancements include:

SAY:

- Differentiation in Job and Individual Responsibilities
- Differentiation in the Rating Scale
- User-Friendly Technology

ASK: How can agency managers and employees benefit from the 5-Point Rating Scale? (Responses will vary. Goal is to identify that successful performance can be measured and evaluated at 3 levels).

ASK: What questions do you have at this time? (Respond accordingly).

SAY: Let's take a look at the 4-Phase Model for effective performance management. Many of you will see that the model represents what you and your agencies currently practice to establish, create, measure and acknowledge the performance results of departments and individuals.

TRANSITION

Four Phases of Performance Management

READ PPT: 4-Phase Model

SAY: This model represents the manager's role in the Georgia performance management process. Each phase has a specific outcome related to results. As illustrated, the results are achieved through a variety of activities.

ASK: Many of you conduct these activities on a regular basis. What best practices do you have that support this model? (Responses will vary).

ASK: Which phase do you believe will be the most challenging for you, and why? (Responses will vary).

SAY: Remember, performance management is a process, not an event.

Trainer Note: **Select 2 to 3 participants to respond. Responses will vary; acknowledge participants and thank them for their response.**

SAY: Our training will provide you with additional knowledge and skills for each phase. You will have the opportunity to share and discuss your best practices and challenges. You will have exercises that will reinforce the training.

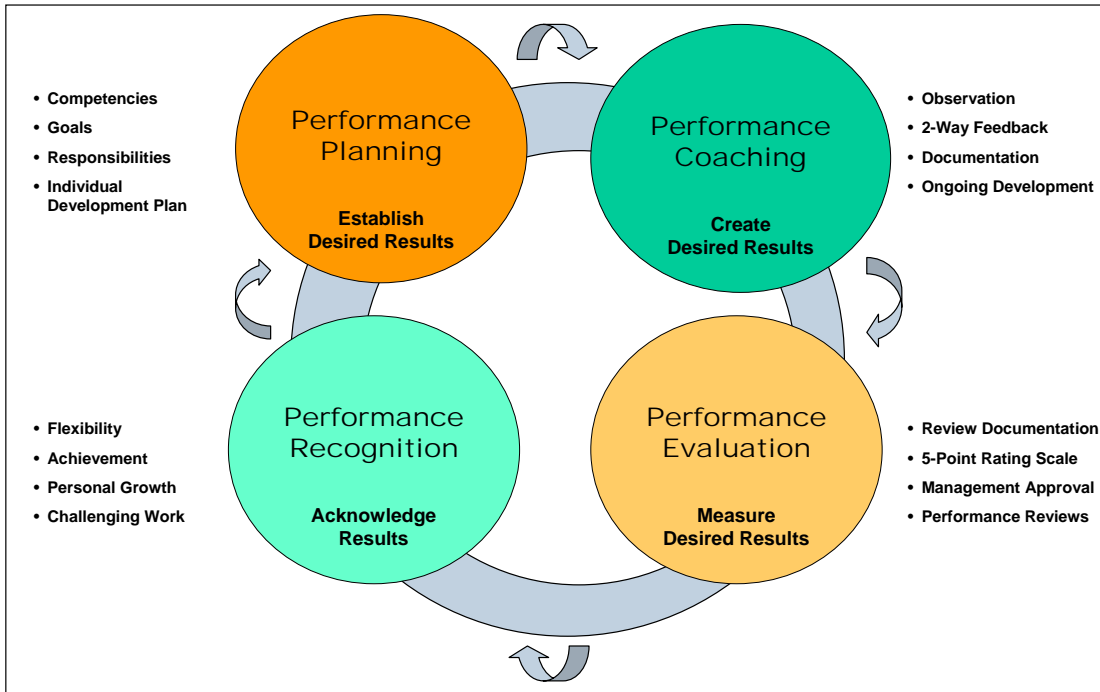
ASK: What questions do you have at this point? (Respond accordingly).

SAY: The new ePerformance model allows the manager and employee to have a clear understanding of WHAT is expected and HOW the expectations will be achieved. The next slide illustrates this point.

TRANSITION



Performance Management 4-Phase Model





Purpose of Performance Management

READ PPT: Purpose of ePerformance

ASK: Does this seem simple to any of you? What are the potential outcomes of an employee who knows WHAT to do and HOW to do it? (Responses will vary).

ASK: How many of you would like to have all of your performance planning tools, documentation, coaching notes, reports and evaluations in one place? (Responses will vary).

SAY: The e-Performance system supports the 'one stop shop' approach to performance management. Let's take a look at the next slide to further explain.

TRANSITION



Performance Management Purpose of Performance Management

- Assesses employees' strengths and areas for improvement
- Focuses on two main measures of success:
WHAT gets accomplished and **HOW** it gets accomplished

WHAT = Specific Goals, Responsibilities, and Objectives

HOW = Competencies necessary to achieve goals (i.e. knowledge, skills, behaviors, and attributes)



Supporting Tools

READ PPT: Supporting Tools

SAY: The system links the key actions of the employee, manager, and HR personnel. The HR Administrator is responsible for initiating the process. They have attended a full-day training session on the system. You will have an opportunity to see a demonstration of the system that supports each phase of ePerformance.

SAY: The next page will provide an understanding of how each step in the system process works, the key roles involved in the system process and the rationale of each step.

TRANSITION



*Performance Management
Management System*



- The Performance Management is supported by the PeopleSoft (PS) *Performance Management* Management System
- Web-based self-service performance evaluation application for managers, employees, and human resources (HR) administrators
- Used for planning, collaborating, communication, assessment and monitoring evaluations



ePerformance System Process Flow

SAY: On the screen and on your right page, you will find the ePerformance system process flow. Please follow along as we review the process flow on the screen.

READ PPT: ePerformance System Process Flow

Trainer Note: Review the flow chart in its entirety.

SAY: This process is conducted throughout the year. As stated earlier, Performance Management is a process...not an event. It is an ongoing, interactive and results-oriented process where the primary roles are played by 2 people. You and your employee.

ASK: What questions do you have about the process? (Responses will vary).

SAY: Remember, your HR team will be your “coach” for all of your needs related to the system. HR begins the systems process. Your primary role in this process is not related to the system.

REFER TO GUIDE: Understanding the System Process Flow

Understanding the System Process Flow

SAY: On the left page of the guide, you will find a table that links the role of the manager and employee to the success of an effectively implemented performance management process.

SAY: Take a minute to review the chart on the left hand side of your guide that reviews the roles and rationale for each of the steps.

Trainer Note: Allow two minutes for managers to read chart.

SAY: As stated earlier, Performance Management is a year-round process, not a one-time event. The 4-phase process is an enterprise-wide approach that occurs on a yearly basis. Each agency will determine and communicate specific due dates for each activity based upon the general timeline.

SAY: Our last slide for this module will allow you to discuss the roles of the manager and employee in the Georgia performance management process – along with a general timeline for the process.

TRANSITION

General Timeline

SAY: Let's take a few minutes with this timeline focusing on the roles of the manager and employee.

READ PPT: General Timeline

Trainer Note: Review the timeline sections for the Manager and Employee only.

SAY: In order to have a full understanding of how the manager and employee will collaborate and interact throughout the year, you will participate in a quick exercise to simulate the partnership required for successful performance to be achieved.

Trainer Note: Setup the Timeline Exercise

SAY: Pick a partner at your table group. One partner will be the manager; the other partner will be the employee. You will have 10 minutes to **review** your respective role, **discuss** the activities involved in your role throughout the year and **establish** an understanding of how 'working together' will help the employee, manager and Agency reach desired results.

ASK: What questions do you have regarding the goal of the exercise and your roles? (Responses will vary. Ensure participants understand exercise. Clarify questions accordingly).

Trainer Note: Allow participants 10 minutes to complete the exercise. Observe table group discussions and be available to answer questions if needed.

EXERCISE DEBRIEF

ASK: Let's share a few of your discussion outcomes. First, let's have the employees speak to their role in the process and how that role will impact performance management. May I have a few volunteers share their exercise experience?

Trainer Note: Allow participants that played the 'employee' role share their exercise outcomes. (Response will vary).

ASK: Let's end with the managers understanding of their role in the process and how that role will impact performance management. May I have a few volunteers share their exercise experience?

Trainer Note: Allow participants that played the 'manager' role share their exercise outcomes. (Response will vary).

SAY: You and your employees are critical to the performance of the Agency and the services offered to the citizens of Georgia. Now, you have a tool that links everyone's performance at all levels of the agency to the strategic goals of the agency and the State of Georgia. This concludes the Georgia ePerformance Management Process overview.

ASK: What questions do you have at this time? (Responses will vary)

TRANSITION TO PHASE I: PERFORMANCE PLANNING OR END SESSION.

