For more information on pulsecheckHR including access to the full user guide please visit our website at:

www.pulsecheckhr.com

Or email your request to:

support@pulsecheckhr.com

Or call the helpline on:

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Terminology

Pulsecheck	The manager's assessment of an employee's performance based on events during the past month
Role	A description of the performance framework the employee is measured against
Attribute	A category against which the monthly assessment is made. Attributes are classified as belonging to either Results, Behaviour or Objectives
Feedback	Information provided by other chosen employees to assist the manager in scoring the attribute
Score	The impression of the employee's performance against an attribute for the period
Target	A specific numeric business achievement during the period
Objective	A short-term business goal tied to organisation development
Commentary	The explanation given by the manager to justify their score
Guidance	Suggested points to take account of in the next period
Attribute weighting	The % emphasis the attribute has on the overall score
Next pulsecheck	Details of guidance, objectives and targets for the following period

pulsecheckHR

Employee Performance Management

Quick Guide for Line Managers

Methodology overview

PulsecheckHR is an employee performance management process that allows the manager to be much more directive in what they expect from an employee.

In place of normal annual appraisals, the manager delivers an assessment in a monthly one-on-one meeting. This performance assessment is recorded along with specific commentary explaining both positive and negative aspects of the performance during the period.

The assessment takes the form of one of three “scores” indicating that the employee’s performance, against the attribute being assessed, was either:

- Outstanding,
- Satisfactory, or
- Requires Improvement

It is important to remember that the assessment relates to what was actually achieved or how the employee behaved in the period in question. The score is specific to the period and must not be a generalised opinion of the employee. All comments must refer to individual incidents which took place in the period being assessed.

So, at the start of each period, each employee has a new opportunity to succeed.

The second part of the pulsecheck is direction for the next period. Completing this is not mandatory but is strongly recommended – in particular where ‘requires improvement’ has been used. The next-period direction allows the manager to modify targets, set objectives and provide written guidance on behaviours they expect to see, meaning employees have no doubt what is expected of them.

Getting started

PulsecheckHR is supported by a custom-written application, designed to make the process of recording pulsechecks easy, intuitive and fast.

As a manager, you will be sent an email by the system welcoming you to the application and requesting you to log on and change your password.

Clicking on the link in the email will open a browser at the log-in page of the application. Your log-in name and initial password will be in the email. When you log in you will be taken to a page asking you to change your password and confirm your acceptance of the licence terms.

Once you have completed the initial log-in, you will be taken to the My Team page where you will see your direct reports listed ready for you to assess. If the list is incorrect, please contact your system administrator who will be able to adjust it for you.

The first time you assess your staff, you will not be able to set objectives or targets. These are established in the “Next Pulsecheck” tab for the following period. Please take some time to set down the measurements (?) you wish to communicate to your staff so that they are absolutely clear what they need to do to succeed. It may be helpful to hold a review meeting with each direct report to agree the framework. Specific numeric targets can be entered into the system, along with results achieved. Where achievement of targets is a key feature of the job, you can store the targets here.

Each attribute and the associated score buttons contain help text in the form of tool-tips to provide guidance on how to mark performance. Please take some time to read these carefully as it is important for managers to mark consistently.

Completing the pulsecheck

Prior to your scheduled one-on-one you need to enter your opinion of the period in question. In matrix situations, or where others in the company can contribute creating a rounded assessment, you should request feedback before completing the score.

By clicking on the orange down arrow below the employee’s name, you will be given the option to “Get Feedback”. Clicking on this opens a window, within which you enter the name of the person you require feedback from and select the attribute(s) you want feedback on. Please allow time for this feedback to be given. All feedback is open and attributable and it is shown on the pulsecheck in the form of text; it is not scored.

For each attribute you need to assess the score for the period. If ‘satisfactory’ is selected, you’re not required to provide a comment, although it may be helpful to do so. If either of the other scores is chosen, a comment is required to justify your conclusion. Please be as specific as possible as generalised statements are not helpful.

If you wish to compare your thoughts on a single attribute across your team, you can use the filters.

Once all scores are entered, the pulsecheck will be submit-able. However, take some time to provide direction on the next pulsecheck page. If there is a specific focus for the next period, you can re-weight the attributes by clicking on the + symbol until you are happy with the new weightings. Weightings are reset automatically each period.

The pulsecheck may be printed at any stage and a copy should be taken to the meeting to give to the employee.