

Fairsail User Guide

**Human
Capital
Management
2.0**

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A. Getting Started

Welcome to Fairsail. This document describes how to use Fairsail. It is available online at help.fairsail.com or as a [printable PDF](#). Suggested starting points are listed below:

New Users

[Accessing Fairsail](#)

[Team Member Profile](#)

[Performance Management](#)

[Talent Management](#)

[Training and Development](#)

HR Manager

[HR Manager Setup and Administration](#)

Further Advice

[Tips for Success](#)

Accessing Fairsail

Fairsail is a web-based system. You don't need to install anything on your computer to use Fairsail. All you need is your regular web browser: Internet Explorer, Netscape, Safari or Firefox (other browsers may work too).

To login to Fairsail you must first have received a user id and password in an introduction email. If you have not received this please email support@fairsail.com. It is worth checking your spam inbox before doing this, as it sometimes goes there.

For your first login, click on the link in that introduction email. You must enter a new password and give a memorable question and answer.

Thereafter, login at the following website (or one given to you by your system administrator):-

<https://fairsail.force.com/login>

Enter your user id and password.

If you are using a computer that hasn't been used to connect to Fairsail before, you may be requested to "authenticate this computer". Clicking the button offered will send an authentication email to your registered email address. You must click on the link in that email before you can use that computer to login. This is a security procedure to prevent hackers from attempting to login.

Team Member Profile

When you log into Fairsail your profile page appears, similar to this one.

On the left is your position within your company: your manager, your colleagues (reporting to the same manager), and your direct reports. Click on any of these to see their profile pages.

On the right are all the details relating to your role within your company. This will fill up as you and your manager use Fairsail. Which sections you see will depend on your companies HR policies.

Note: If you don't like your picture click "Edit" in the details section to change it.

Profile

Steve Pendleton

[Details](#) [Edit](#)

Department Information Technology
 Email colin@fairsail.com
 Mobile Number 07740841515

Objectives

Name	Status	Action	Progress	Next Review	End
Improve quality standards	Active	Manager: Review	Ongoing: On Track	31 Jul 2009	31 Jul 2009
Develop new products	Active		Ongoing: Above Track	31 Dec 2010	31 Dec 2010
Increase Regional performance by 25% by year End	Active		Ongoing: On Track	31 Dec 2010	31 Dec 2010

Targets

Name	Progress	Target	Actual	0%	100%
Global Sales	Ongoing: On Track	GBP 3200000	GBP 1740000	<div style="width: 54%;"></div>	

Performance Review [View](#)

Team Member Action **Sign**

Status Revealed

Rating Exceeds Expectations

Manager Review Done a really good job this year. The new product areas have made a real difference to our competitive position. Good sales growth.

Team Member Review I appear to be on track regards the Revenue targets

Skills

Area	Name	Action	Level	0%	100%
Business Law	Contracts	Manager: Approve	Intermediate	<div style="width: 75%;"></div>	
Business Law	Intellectual Property Rights	Manager: Approve	Intermediate	<div style="width: 75%;"></div>	
Business Law	Lawsuits and Negotiation	Manager: Approve	Fully Skilled	<div style="width: 100%;"></div>	
Finance	Accrual Accounting	Manager: Approve	Intermediate	<div style="width: 75%;"></div>	
Languages	German	Manager: Approve	Intermediate	<div style="width: 75%;"></div>	
Management	Appraising Performance		Intermediate	<div style="width: 75%;"></div>	
Microsoft .NET Core	Visual Studio 2008	Manager: Approve	Fully Skilled	<div style="width: 100%;"></div>	
PC Software	Excel	Manager: Approve	Intermediate	<div style="width: 75%;"></div>	

Managers

Phil Symmonds

Colleagues

Eric How

Peter Seargent

Jill Witherspoon

Direct Reports

Linda Halliwell

Nikola Krastev

Guy Smiley

Etaine Triscott

B. Performance Management

“To ensure the organization’s and manager’s vision is communicated to the team members”.

The Fairsail Performance Management module consists of a set of tools for the manager and the team member to define and agree a set of [objectives](#), [targets](#) (if the team member has sales responsibilities) and a [job description](#). The objectives and targets are reviewed during the year and at the end of the year. Finally a [performance review](#) takes a look at the overall performance of the team member as a lead-in to the [Talent Management](#) and [Training and Development](#) sections of Fairsail.

This whole process loops every year. This year is normally based either on the company financial or calendar year or on the anniversary of the start date of the team member. Talk to your HR manager for company policy on this.

Tips for Success

[Creating Objectives](#)

[Writing Job Descriptions](#)

[Effective Performance Review](#)

Objectives

An objective is something that a manager and a team member agree that the team member will accomplish. Good objectives are [SMART](#) – Specific, Measurable, Achievable, Relevant and Time Bound. Fairsail will enable you to agree such objectives, monitor progress and then review how well they have been achieved.

An objective that has a purely financial goal (e.g. sell \$1M worth of product) is better entered as a [target](#).

Each Team Member will have, typically, between two and six objectives to be achieved over the course of a year. However, some types of job might have quite different norms: for example those that are project based. Use whatever is most appropriate for the job.

The Actions page will show team members that do not have any current objectives and objectives that need to be reviewed.

Tips for Success

[Creating Objectives](#)

[SMART Objectives](#)

[Aligned Objectives](#)

[Objective Formula](#)

[Examples of SMART Objectives](#)

Objectives Section of Team Member Profile

The objectives section of your [Team Member profile](#) page shows your current objectives. If you view the profile page of any of your direct reports (or reports further down below them) you can see all their current objectives. You can also view the non-private objectives of anybody in your company by navigating to their Team Member profile.

Objectives Profile

The objectives profile is reached by clicking on “View” on the top line of the objectives section of the [Team Member profile](#). The objectives profile shows recently closed and current objective. It also shows more details on all that person’s objectives. This is the best place for a team member to view and work on their own objectives in one place, or for a manager to view and work on the objectives for just one team member.

Objectives Team Profile

The objectives team profile is reached by clicking on “Team” on the top line of the objectives section of the [Team Member profile](#). The objectives team profile shows all of the current objectives for a whole team.

New Objective

Managers or team members can create a new objective. Either:

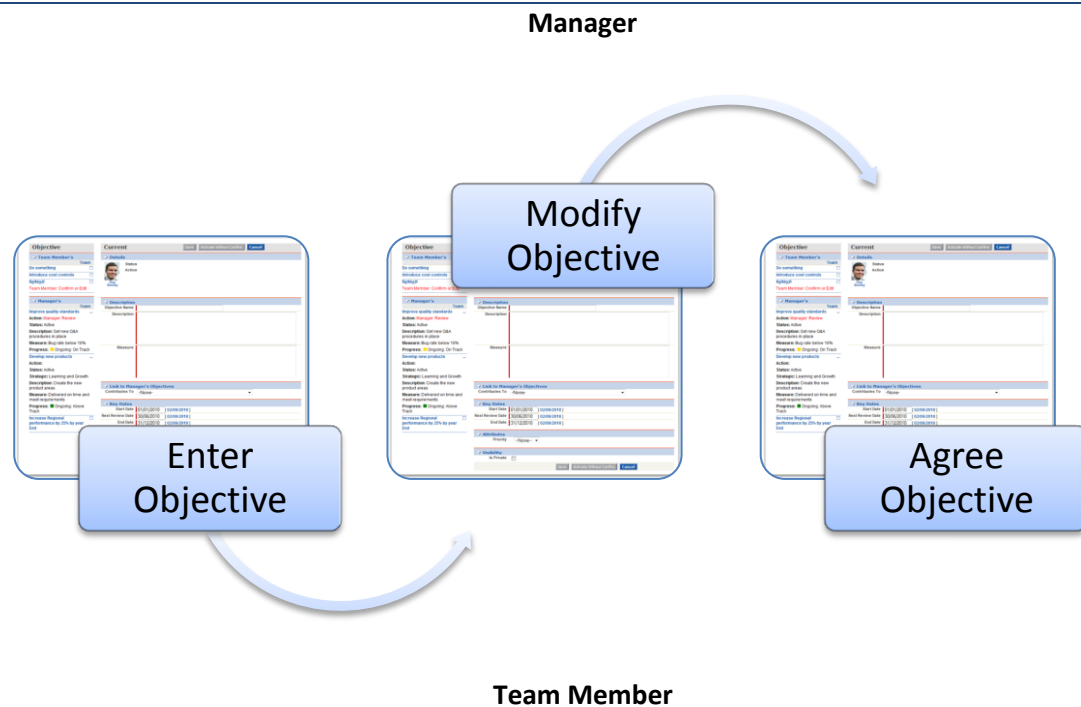
- a. Press the “New” button on the [Team Member profile](#) for the appropriate team member at the start of the “Objectives” section.
- b. Press the “New” button on the [objectives profile](#) for the appropriate team member.

Enter the details for the objective (exactly what details are needed will depend on your companies HR policies):

Name	A short description/name of the objective.
Description	A longer and specific description of what is to be achieved. For advice on this see Tips for Success: Creating SMART Objectives .
Measure	Details of how the manager and team member will know that the objective has been achieved. For advice on this see Tips for Success: Creating SMART Objectives .
Start Date	The date the Team Member will/did start work on the objective.
Next Review Date	The date the objective will next be reviewed.
End Date	The date the objective is to be achieved by.
Strategic Objective	The company-wide strategic objective to which this objective is part.
Contributes To	The manager's objective to which this objective is part.
Priority	High, medium and low. Use low for stretch or development objectives.
Required for Bonus	Will this objective be considered as part of an annual performance bonus?
Weight	What weighting for importance/degree of difficulty is put on this objective? This is expressed as a percentage (i.e. out of 100). The weights of all the current objectives for a team member should add up to 100%.
Private	Check this if you wish to keep this objective private to the team member with the objective and their manager.

Save the objective by pressing the "Save" button. If the manager creates the objective it will be set to status "[Manager Draft](#)". If the team member creates the objective it will be in status "[Team Member Draft](#)". If the team member is not a Fairsail registered user (see manager only mode) then the objective will go directly to the status "[Active](#)".

Objective Setting Overview



Team Member Draft Objective

Objectives in “Team Member Draft” have either been newly entered by the team member or amended by the team member from an original entered by the manager. They are waiting for the manager to look at them.

The manager has two choices:

1. Accept the objective as entered or amended by the team member. The manager does this by pressing the “Approve” button on the objective detail view. The objective will change to status “[Active](#)”.
2. Make amendments to the objective. The manager does this by pressing “Edit” on the objective detail view, making the change, and pressing the “Save” button. The objective will change to status “[Manager Draft](#)”.

Manager Draft Objective

Objectives in “Manager Draft” have either been newly entered by the manager or amended by the manager from an original entered by the team member. They are waiting for the team member to look at them.

The team member has two choices:

1. Accept the objective as entered or amended by the manager. The team member does this by pressing the “Confirm” button on the objective detail view. The objective will change to status “[Active](#)”.
2. Make amendments to the objective. The team member does this by pressing “Edit” on the objective detail view, making the change, and pressing the “Save” button. The objective will change to status “[Team Member Draft](#)”.

The manager may also intervene by:

3. Deciding that the objective is non-negotiable by the team member. The manager does this by pressing the “Save without Confirm” button on the objective detail view. The objective will change to status “[Active](#)”.

Active Objective

Objectives in “Active” have been agreed by the manager and team member or required by the manager. Active objectives cannot be edited (except as part of the review described below).

After the Next Review Date the objective will be flagged as requiring a review. This flag shows as “Review” appearing on the [Team Summary](#) home page. Objectives can also be reviewed before the Next Review Date is reached if desired.

Objectives are reviewed by either the manager or team member pressing the “Review” button on the objective detail view. What they then enter for the review differs:

Team member objective review

Continuing, Closed or Completed Objective

The team member enters a text comment giving their view of the progress they have made towards the objective. The team member can see their last comment and the most recent comment by the manager.

Manager objective review

Continuing Objective

The manager enters a progress status for the objective of either “On Track” or “Above Track” or “Below Track”. Also enters a text comment giving their view of the progress the team member has made towards the objective. Finally, the manager enters a date for the next review of this objective. If the new Next Review Date is after the End Date for the objective then the objective is extended to the new date.

Closed or Completed Objective

The manager enters a final progress status for the objective of either “Closed: Completed”, “Closed: Exceeded”, “Closed: Not achieved”, or “Closed: Cancelled”. Also enters a text comment giving their view of the final progress the team member has made on the objective. The objective then goes to status “[Closed](#)”.

Closed Objective

Once an objective is closed by the manager it cannot be reopened. It remains so it can be considered as part of an overall [Performance Review](#).

Objectives can be repeated by pressing “Clone” on the closed objective detail view. This creates a [new objective](#) with the same initial details as the previous objective.

Targets

This records a set of financial targets (or quotas) that a manager wants a team member to achieve over a specified period. This system implements the process of setting targets, monitors actuals during the active period, and records comments by managers and team members on success or lack of success.

Targets Section of Team Member Profile

The targets section of your [Team Member profile](#) shows your current targets. If you view the profile page of any of your direct reports (or reports further down below them) you can see all their current targets. You can also view the non-private targets of anybody in your company by navigating to their Team Member profile.

New Target

Only managers can create a new target. Press the “New” button on the [Team Members Profile](#) of the appropriate team member.

Enter the details for the target:

Name	A short description/name of the target.
Target Quarter 1	The amount to be achieved by the end of the first quarter.
Target Quarter 2	The amount to be achieved by the end of the second quarter.
Target Quarter 3	The amount to be achieved by the end of the third quarter.
Target Quarter 4	The amount to be achieved by the end of the fourth quarter.
Start Date	The date the Team Member will/did start work on the target. This must be the beginning of the year.
Private	Check this if you wish to keep this target private to the team member with the target and their manager.

Save the target by pressing the “Save” button. The target will be set to status “[Draft](#)”. If the team member is not a Fairsail registered user (see manager only mode) then the target will go directly to the status “[Active](#)”.

Draft Target

Targets in status “[Draft](#)” have either been newly entered by the manager or amended by the manager whilst “[Active](#)”. They are waiting for the team member to confirm that they have seen and acknowledged the target.

The team member confirms the target by pressing the “Confirm” button on the target detail view. The target will change to status “[Active](#)”.

Active Target

Targets in status “[Active](#)” have been entered by the manager and confirmed by the team member. Active targets can only be edited by the manager (except as part of the review described below). Changed targets return to the “[Draft](#)” status.

Entering Actuals

“Actuals” are the actual amounts made by the team member in pursuit of a target. In Fairsail there are two types: entered actuals and Salesforce actuals.

Entered actuals are entered by the manager or HR manager. They can also be linked to a finance system and imported automatically (if this option is configured). Either way they are the definitive real amount made by the team member. They are used as the actuals for the bar charts on the target home, the team member summary and in reports.

Salesforce actuals are computed by Fairsail from the closed opportunities from the Salesforce part of the system. To compute Salesforce actuals a team member must be a registered Fairsail and a registered Salesforce user. Further, that team member must have entered opportunities into the Salesforce system and closed those opportunities during the appropriate quarter for the Fairsail target. Salesforce actuals are computed whenever any user views the target detail view for a given target.

Target Review

Targets can be reviewed at any time by either the team member or manager. Targets are reviewed by pressing the “Review” button on the target detail view. What team members and managers enter for the review differs:

Team member target review

Continuing or Closed Target

The team member enters a text comment giving their view of the progress they have made towards the target. The team member can see their last comment and the most recent comment by the manager.

Manager target review

Continuing Target

The manager enters a progress status for the target of either “On Track” or “Above Track” or “Below Track”. Also enters a text comment giving their view of the progress the team member has made towards the target.

Closed Target

The manager enters a text comment giving their view of the final progress the team member has made on the target. The target then goes to status “[Closed](#)”.

Closed Target

Closed targets remain on the team member summary so they can be considered as part of an overall [Performance Review](#).

Targets can be repeated by pressing “Clone” on the closed target detail view. This creates a [new target](#) with the same initial amounts as the previous target.

Job Description

This section records the written specification of the roles and responsibilities of a job. It implements the process of entering and agreeing the job description by the manager and team member.

As well as being good practice, having an up-to-date and agreed job description for all employees is a requirement of meeting Sarbanes-Oxley legislation that applies to any company operating in the USA.

Each team member has a job description. This consists of: job title, grade, and key responsibilities.

Tips for Success

[Writing Job Descriptions](#)

Job Description Section of Team Member Profile

The job description section of your [Team Member profile](#) shows your current job description. This is the best place for a team member to view and amend their own job description, or for a manager to view and work on the job description for just one team member.

New Job Description

If a team member has a new job or if their existing job description needs amending create a new job description to define and record what the job entails. Click on “New” in the job description section of the [Team Member profile](#).

You will be asked if you want to base the new job description on one of the following:

1. The most recent job description for the team member (if there is one).
2. A job description from the job description library (entered by the HR manager). You will see a list of all job descriptions in the library. If the team member has a job grade assigned then this will be limited to just the job descriptions with a matching job grade.
3. A blank job description.

If the team member has a job description already entered in either “Manager Draft” or “Team Member Draft” status then you will be taken directly to that draft. A team member cannot have two job descriptions in draft.

Enter the details for the job description:

Job Title	A short job title.
Grade	The job grade.
Key Responsibilities	Details of the job responsibilities. For advice on this see Tips for Success: Writing Job Descriptions

Save the job description by pressing the “Save” button. If the manager creates the job description it will be set to status “[Manager Draft](#)”. If the team member creates the job description it will be in status “[Team Member Draft](#)”. If the team member is not a Fairsail

registered user (see manager only mode) then the job description will go directly to the status "[Active](#)".

Team Member Draft Job Description

A job description in "Team Member Draft" has either been newly entered by the team member or amended by the team member from an original entered by the manager. It is waiting for the manager to look at it.

The manager has two choices:

1. Accept the job description as entered or amended by the team member. The manager does this by pressing the "Approve" button on the job description detail view. The job description will change to status "[Active](#)".
2. Make amendments to the job description. The manager does this by pressing "Edit" on the job description detail view, making the change, and pressing the "Save" button. The job description will change to status "[Manager Draft](#)".

Manager Draft Job Description

A job description in "Manager Draft" has either been newly entered by the manager or amended by the manager from an original entered by the team member. It is waiting for the team member to look at it.

The team member has two choices:

1. Accept the job description as entered or amended by the manager. The team member does this by pressing the "Confirm" button on the job description detail view. The job description will change to status "[Active](#)".
2. Make amendments to the job description. The team member does this by pressing "Edit" on the job description detail view, making the change, and pressing the "Save" button. The job description will change to status "[Team Member Draft](#)".

Active Job Description

A job description in "Active" status has been agreed by the manager and team member. Active job description cannot be edited. When circumstances change a [new job description](#) must be created.

Closed Job Description

A job description is automatically set to "Closed" status when a new job description is agreed for a team member.

Performance Review

Implements a performance review of a team member. This review is completed annually (or sometimes bi-annually). It is a summary of the overall performance of a team member over the review period.

A key output is the performance rating for the team member. This is used in other processes such as talent management and succession planning. It is also used for pay and bonus planning.

The crucial part of the performance review is the review meeting between manager and team member. All parts of the performance review of a team member - preparation, approval by HR, and comments after the meeting - are recorded in the system by the manager. The team member can enter comments, and the review may optionally also include a self performance review entered by the team member about themselves. A self performance review cannot be created except as part of a performance review.

Tips for Success

[Using the Performance Rating Scale](#)

[Writing Performance Review Comments](#)

[Writing Your Self Performance Review](#)

[Receiving Feedback during a Performance Review](#)

Performance Review Section of Team Member Profile

The Performance Review section of your [Team Member profile](#) shows your current Performance Review.

New Performance Review

Managers can create a new performance review by clicking on the “New” button in the performance review section of the [Team Member profile](#) for the appropriate team member.

If the team member has a performance review already entered in either “Draft”, “Approved”, or “Revealed” status then you will be taken directly to that performance review. A team member cannot have two performance reviews ongoing at the same time.

Enter the details for the performance review:

Rating	The overall performance rating for this team member. This will take into account all objectives, targets, personal development etc achieved by that team member during the year. For advice on this see Tips for Success: Using The Performance Rating Scale
Manager Review	A written description expanding on the performance rating. For advice on this see Tips for Success: Writing Performance Review Comments
Manager Review Only	If checked then the self performance review will not be created. Only the manager will participate in the performance review. Note that for the team member to participate they must be a registered user of Fairsail.

Save the performance review by pressing the “Save” button. If the performance review approvals are required it will be set to status “[Draft](#)”.

If “Manager Review Only” is not checked and the team member is a registered user of Fairsail then the [Self Performance Review](#) is created for the team member.

Draft Performance Review

Performance reviews in “Draft” status have been newly entered by the manager. The team member will not yet be able to see what has been entered. For them to do so the performance review must be revealed. Before it can be revealed there may be a requirement that the performance review is approved by HR. This requirement is set by the HR manager in the HR policies for the department.

There will be one or two steps available to the manager:

1. Submit the performance review for approval. Press the “Submit” button on the performance review detail view. The performance review will remain in “Draft” status until set by the HR manager to “[Approved](#)” status.
2. Reveal the performance review to the team member. Press the “Reveal” button on the performance review detail view.

The manager will no longer be able to edit the performance review after having submitted or revealing it.

HR Approval of Performance Review

HR Managers will review the rating and review comments. They can do one of the following:

1. Approve the performance review. The performance rating and review comments may be altered directly by the HR administrator prior to doing this. The performance review is set to “[Approved](#)” status.
2. Reject the performance review. The performance review passes back to the manager for amendment before being resubmitted. It remains in the “Draft” status.

Approved Performance Review

Performance reviews in “Approved” status have been entered by the manager and approved by HR. They are ready to be revealed to the team member.

The manager can reveal the performance review to the team member as soon as it is approved. The manager might wait until during or after the [performance review meeting](#) with the team member. This would be appropriate if, for example, the review contained bad news. If in doubt consult your HR manager.

The manager reveals the performance review to the team member by pressing the “Reveal” button on the performance review detail view. The status changes to “[Revealed](#)”.

Self Performance Review

A self performance review is created as part of a performance review by the manager. It is an opportunity for the team member to comment on their own performance during the year.

The self performance review details page is reached by clicking on the active performance review in the performance review section of your [Team Member profile](#). You can only do this once your manager has started the review process.

The self performance review starts in “[Draft](#)” status.

Tips for Success

[Writing Your Self Performance Review](#)

[Receiving Feedback during a Performance Review](#)

Draft Self Performance Review

A self performance review in “Draft” status is ready for a team member to enter their self review or after these comments have been entered prior to revealing them to the manager.

From the details page press the “Edit” button to enter the self performance review.

The self performance review is a text comment. This will take into account all objectives targets, personal development etc done by that team member during the year.

When the review has been entered the self performance review is ready to be revealed. The team member may elect to delay this to during or after the performance review meeting.

Reveal the self performance review by pressing the “Reveal” button on the self performance review details page. The self performance review will move to the “[Revealed](#)” status.

Tips for Success

[Writing Your Self Performance Review](#)

Performance Review Meeting

The manager is now ready to hold the performance review meeting with the team member. If the team member has entered a [self performance review](#) then this meeting will include discussion of the reviews entered by both the manager and team member. Allow time for the team member to write their [self performance review](#) before holding the meeting.

Neither the manager nor team member is obliged to reveal their comments or the rating before the performance review meeting but it is much better if they both do so. The meeting will not work well as an “ambush”. However, it is appropriate to withhold the comments if, for example, they are bad news. Such information is always best delivered face-to-face.

The performance review meeting is the most important part of the performance review process. The rest of the performance review process is simply a preparation for the meeting.

Tips for Success

[Receiving Feedback during a Performance Review.](#)

Revealed Self Performance Review

A self performance review in “Revealed” status is one that has been entered and revealed by the team member. You are now ready for the [performance review meeting](#) with your manager. This review meeting is the most important part of the performance review process. By making your own notes you will be well prepared for it.

After the meeting the self performance review must be signed by the team member. This signing must be done before the manager can sign the performance review. You are not necessarily signing that you agree with you manager, although that is preferable. You are signing to acknowledge that the performance review has taken place. You do have an opportunity to put a final comment before you sign. The manager cannot make any comments beyond what has already been put in the performance review.

Sign the self performance review by pressing the “Sign” button on the self performance review details page. The team member will be asked to make a final comment on the performance review. This comment is anything that the team member wishes to be taken into account in the review that has not already been entered by them or the manager.

Once the final comments are entered the team member presses the “Save” button. The self performance review goes to the “[Completed](#)” status.

Tips for Success

[Receiving Feedback during a Performance Review.](#)

Revealed Performance Review

Performance reviews in “Revealed” status have been entered by the manager, possibly sent for approval by HR, and revealed to the team member.

The manager now holds the [performance review meeting](#) with the team member. After the meeting the performance review is signed by the manager. If there is a [self performance review](#) then the performance review cannot be signed by the manager until:

1. The self performance review has been revealed to the manager
2. The self performance review has been signed by the team member.

After the above conditions are met then the manager signs the performance review. Do this by pressing the “Sign” button on the review detail view. The status changes to “[Completed](#)”.

Completed Self Performance Review

A self performance review in “Completed” status is one that has been entered, revealed and signed by the team member. This releases the linked performance review for [signing by the manager](#).

A “Completed” self performance review cannot be edited by anyone.

Completed Performance Review

A performance review in “Completed” status is one that has been entered, revealed and signed by the manager. If a self performance review was included then this must have been completed too.

A “Completed” performance review cannot be edited by anyone.

C. Talent Management

“To ensure you have the right people for both existing and future needs.”

The Fairsail Talent Management module consists of a tool for the manager and the team member to specify the technical [skills](#) of the team member. It also provides tools for the manager to take a strategic view of the [successors](#) available for key positions and to define and utilise key parameters to manage the [talent pool](#).

The Talent Management processes are not necessarily tied to business cycles, unlike the processes in [Performance Management](#) or [Development](#). However it is important that they be consistently reviewed and refreshed when changes occur. Fairsail will prompt the manager and team member to do this.

Tips for Success

[Assessing Skills](#)

[Managing Succession in Your Organization](#)

[Managing Key Talent in Your Organization](#)

Skills

“Skills” within Fairsail are the technical abilities or knowledge required to perform a job. This covers a broad area and will differ wildly from company to company. The skills required by a company are defined in the Skill Library by the HR manager. Managers and team members set the level of ability of team members against skills selected from the Skill Library.

Skills Section of Team Member Profile

The skills section of your [Team Member profile](#) shows your current skills. This is the best place for a team member to review their own skills in one place or for a manager to view and work on the skills for just one team member.

New Skill

Click on “New” in the skills section of the appropriate [Team Member profile](#).

Enter the details for the skill:

Skill	A skill selected from the skill library.
Experience	A text description summarising the experience that the team member has with this skill.
Proficiency (or score).	The degree of proficiency of the team member with this skill.

Save the skill by pressing the “Save” button.

Successors

For each team member there is a list of successors (other team members). This is entered by the manager or HR administrator. This is not seen by the team member. Against each successor there is a readiness rating – either “now”, “within a year” or “within two years”.

Successors Section of Team Member Profile

The successors section of your direct reports' [Team Member profiles](#) shows their successors. This is the best place for a manager to view and work on the successors for just one team member.

New Successor

Only managers can create a new successor. Click on “New” in the successors section of the appropriate [Team Member profile](#).

Enter the details for the successor:

Team Member	Link to the team member currently doing the job.
Successor	Link to the team member that is the potential successor.
Readiness Rating	Rating of how soon the successor will be ready to realistically perform the potential job. “Now”, “Within a Year”, or “Within Two Years”.

Save the successor by pressing the “Save” button.

Succession Reports

A succession report lists all team members, totalling the number of successors and the highest readiness of those successors. This is sorted by the ascending number of successors and then the descending highest readiness. The most critical people for whom to find successors are at the top of the list. This report will also contain data from the talent plan: risk of leaving and potential.

Talent Plan

A manager or HR administrator enters a set of information on the team member to make up a talent plan. The plan attempts to assess the current performance level and potential of the team member; as well as the risk of them leaving, the reason, and consequence for the organization.

This is not seen by the team member and normally entered by the manager.

Talent Plan Section of Team Member Profile

The talent plan section of direct reports' [Team Member profiles](#) shows the most recent talent plan for those team members. This is the best place for a manager to view and work on the talent plan for just one team member.

New Talent Plan

Only managers can create a new talent plan. Click on "New" in the talent plan section of the appropriate [Team Member profile](#).

Enter the details for the talent plan:

Performance Rating	Taken from the latest value set by the review process. If no review process has been done then it may be entered by hand
Potential	What level within the company has this person the potential to reach in the next two years? Either "low", "medium" or "high".
Risk of Leaving	What is the risk that this person will leave in the next two years? Either "low", "medium" or "high".
Reason to Leave	What is the primary reason that there is a risk that someone will leave? Either "No career progression", "Seeking new skills", "Salary", "Personal/family change", "Work environment", "Fitting in to team" or "Other".
Impact of Loss	What is the impact to the company if this person leaves? Either "low", "medium" or "high".

Save the talent plan by pressing the "Save" button.

Talent Plan Reports

A series of scatter plots to highlight various issues.

Scatter plot of performance vs. potential for a set of team members. People will then fall into one of four categories:

1. High potential and performance – the rising stars.
2. High performance, low potential – best in current job.
3. Low performance, high potential – need to move or resolve issue.
4. Low potential and performance – need to develop or remove.

Scatter plot of criticality vs. risk of leaving. People will then fall into one of four categories:

1. High criticality and risk of leaving – urgent need to find successors or tackle reason.
2. High risk of leaving, low criticality – only a problem if high potential.

3. Low risk of leaving, high criticality – find successors.
4. Low criticality and low risk of leaving – only a problem if also low potential and performance.

Plot an organisation chart with coloured bars showing the various factors above. Able to switch in and out factors as desired. Use this to highlight issues within organisation.

D. Training and Development

“To ensure your people have the right skills and competencies for their current and potential future jobs”.

The Fairsail Training and Development module consists of tools for the manager and team member to [assess a team member’s competencies](#) and to identify [development needs](#) for both skills and competencies. Competency assessment can either be done by just the manager and team member or it can include other assessors; typically the colleagues and direct reports.

The focus is entirely on development of the team member. This is essential to ensure they have all the skills and competencies required for their existing job or to meet the changing needs of both the individual and the organization. Input to what development is required will come indirectly from [Performance Management](#) (immediate job needs) and from [Talent Management](#) (immediate skill needs and future succession or career path).

Tips for Success

[Competency Assessment and 360 Feedback](#)

Competency Assessment

Team members are assessed against a list of competencies and behaviours. This is done either by just the manager (as a training need analysis) or by the manager, team member, peers and the team member's team members (as full multi-rate 360 feedback). The main purpose is to illuminate the behavioural side of work performance and drive development planning.

To start off the team member needs a set of competencies and behaviours on which to be assessed. The competencies and behaviours are listed in a competency and behaviour library. A role is created from a list of those competencies. A manager or HR administrator selects a role for a team member when initiating a competency assessment.

Assessors complete a questionnaire for the role being assessed. The manager is always one of these assessors. If the team member is not a registered user then only the manager can make the assessment. If the user is a register user then they make a self assessment. They can also ask other registered users to contribute their assessment of this team member. These other assessors are grouped into "colleagues", "direct reports" or "others". There must be a minimum of 3 registered users in each of those assessor groups. The system will not show results until the requisite number have responded.

Assessors complete feedback by completing a questionnaire. Their responses to the questionnaire are only available when all questions have been answered. The team member, manager and HR administrator can see who has and has not completed their questionnaires.

When a request for assessment is made a date is set by which completion is required. Any time after that date the assessment request can be cancelled. The assessor is informed.

An assessment can be closed if there are no outstanding assessment requests. On closing, the system will enforce anonymity by checking to see that all assessor groups (other than self and manager) have 3 or more assessors. Any assessments in groups (other than self and manager) that do not have 3 assessors are converted into the group "other". After that if the group "other" does not have 3 assessors then the group (other than self and manager) with the least assessors is converted to "other". If after all assessments (other than self and manager) are converted to "other" there is still not sufficient feedback in "other", then the "other" category is disregarded in the results. After automated scoring, the original raw responses are deleted to protect assessors' anonymity. It will then be too late to add to any results that were not included in the scoring.

New Competency Assessment

Click on "New" in the competency assessment section of the appropriate [Team Member profile](#). You can only have one active competency assessment for each team member.

First of all you must enter some details for the assessment:

Team Member	The person who will be the subject of the competency assessment (the person to be assessed). This will default to the Team Member on which you pressed the [New] button.
--------------------	--

Job Profile	The Job profile containing the competencies and indicators that are to be assessed. This will be set up by your HR manager. Choose the Job profile that you have been asked to use.
End Date	Date by which people are asked to complete feedback. Set this a few days before the "Close Date" to give time to chase stragglers.
Close Date	Date after which the competency assessment may be completed and outstanding feedback requests cancelled. Make this shortly after the "End Date" to give a grace period for feedback to be completed.

The End Date is the date by which people are asked to complete assessments. The Fairsail configurable workflow can send them reminders before and immediately after that day. The Close Date is not normally revealed to the assessors but is the date up to which you will wait for them. The system will not let you cancel assessments to see your results until the Close Date. You may see the results before then if all assessments are complete.

When you have entered these details press the "Save" button.

The system creates the new competency assessment. It will automatically add two assessors: the Team Member being assessed (the self assessment) and their manager (the manager assessment). You need to add the other assessors before starting the competency assessment.

Add assessors by pressing the "New" button at the top of the list of assessors. You will be asked for the following details:

Assessor	The person that will be giving the assessment. This must be a licensed user of the system.
Reporting Relationship	The reporting relationship that the person doing the assessment has to the person being assessed. These are used to group the results. If you ask for any one person in any of these groups then you must ask at least two others in that group for the group to show separately in the results.

Repeat the above step until you have asked all your assessors.

Starting a Competency Assessment

Press the "Start" button on the Competency Assessment view page. This informs the assessors that you have requested them to complete an assessment. They will now be able to start entering those assessments.

Note that various rules might be set by your HR manager for the assessors that you ask. These might include:

1. A requirement for a self and/or manager assessment.
2. A minimum number of assessors.

You will not be able to start the competency assessment until all these conditions are met. If you press the "Start" button you will be informed of any conditions outstanding, if there are any.

Completing a Competency Assessment

When the assessments have been gathered the competency assessment is marked as completed. This processes the assessments and prepares the results for viewing. Completion of the competency assessment is done by the team member, manager or HR manager pressing the “Complete” button on the competency assessment view page. Fairsail may complete the assessment automatically when all assessments are complete if that option is selected in the policies for the team member’s department.

If there are any assessments that are not yet completed then they are cancelled. Assessments cannot be requested or completed after the competency assessment has been completed. The process of completing the competency assessment cannot be reversed.

Conditions

The competency assessment must meet a series of (configurable) conditions before it can be marked as completed. These may include:

1. That a self assessment has been completed.
2. That a manager assessment has been completed.
3. That a minimum number of other assessors have completed an assessment.
4. That either all the assessors that have been asked to give feedback have completed it – or that the competency assessment “close date” has past and you no longer wish to wait for the feedback to be completed.

Conditions 1 to 3 are controlled by the HR policies set for a department. These policies can override the need for self and/or manager assessments and the number of other assessments that are required.

If a competency assessment fails any of these conditions the system will refuse to allow the completion and will display a message giving the reasons.

Anonymity Protection

The system gives anonymity to assessors by hiding the identity of all assessors (other than self and manager). To give this protection the completion process ensures that there are no fewer than three assessors in any one assessor group (other than self and manager). If there are less than three completed assessments in any such group then groups will be merged. The steps that are taken to merge groups are:

1. All groups with less than three assessors are added to the group “other”. If the “other” group does not exist then it is created.
2. If the “other” group does not have three completed assessments then the smallest group with three or more assessors is added to the “other” group. If two groups tie for minimum number of assessors then the first one in the following order is used:
 - a. Colleague
 - b. Direct report
 - c. Customer.
3. If there are still less than three completed assessments other than self and manager then only the self and manager results are used in the results. The other assessments will not be

counted. (Note that this eventuality will not occur if at least three assessments are required in condition 3 above).

After combining groups and scoring the questionnaire the individual responses are deleted. This further protects the anonymity of assessors in countries where computer information held on an individual may be liable to be revealed to that person on request. The deletion also significantly reduces the data storage requirements of multi-rater feedback.

Competency Assessment Results

For closed assessments results are displayed showing:

- [Competencies](#) ranked by overall average score of all but the self assessment. Overlaid are the scores for self, the average for each of the other groups, and the frequency of each response.
- [Indicators](#) ranked by overall average score of all but the self assessment. Overlaid are the scores for self, the average for each of the other groups, and the frequency of each response.
- The above indicators ranking for each individual competency to which they belong.
- [Comments](#) made by assessors for each indicator grouped by competency.

Competencies

The competencies are factors of behaviours or personal values that are assessed during a competency assessment. A competency assessment is normally of between three and a dozen competencies. Each competency is, in turn, made up of a number of [indicators](#), or the actual items in the questionnaire that assessors are asked to rate. A competency normally has between three and a dozen indicators. All of the indicators for all of the competencies make up the online questionnaire used by each assessor.

When a competency assessment is scored the individual indicator scores within each competency are averaged up to give that competency's score.

Indicators

Indicators are the individual aspects of behaviour or personal value that make up a [competency](#). They are the actual questions used in the online questionnaire.

When a competency assessment is scored the assessors scores for each indicator are averaged, with the self score kept separate.

Indicator Comments

Indicator comments are the optional text comments given by assessors to explain their assessment of that [indicator](#). These comments are included in the results without identifying who said them (other than the type of assessor). However, the comment itself sometimes identifies who gave it.

Development Needs

The team member and manager will flag a list of areas that need development. These are either: skills (from the [skills](#) process above) or competencies (from the [competency assessment](#) process). With each identified need there is the desired level of ability for the team member and a date that level should be achieved.

Development Needs Section of Team Member Profile

The development needs section of your [Team Member profile](#) shows your current development needs. This is the best place for a team member to review their own development needs in one place or for a manager to view and work on the development needs for just one team member.

New Development Need

New development needs can only be entered for skills or competencies that have been assessed for that team member. Navigate either to the skill in the [skills profile](#) or the competency in a completed [competency assessment](#).

Enter the details for the development need:

Team Member	The team member to whom the development need applies
Competency or Skill	The skill or competency being assessed; depending on if this is a need for a skill or competency to be developed.
Current Proficiency	The current level of skill or competency expressed as a score (with one being the minimum value on the rating scale). Also show is either the rating scale label equivalent to the score (or the nearest labels above and below).
Required Level	The level of skill or competency that the team member is to be developed towards.

Save the development need by pressing the “Save” button.

E. Tips for Success

This section gives advice for the manager and team member to get the most value from the Fairsail system. Much of it is good general advice on better management of teams. Using Fairsail will empower your team and make you a better manager.

Creating Objectives

Objective setting is the foundation for individual and team success. It creates motivation and engagement. The first step in the process of performance management is to establish objectives that are measurable. These objectives state how the performance of team members is to be measured to assess progress throughout the performance year.

SMART Objectives

All objectives should be able to meet the following criteria:

S	Specific	Identify the precise and significant outcome of an activity or task in a clearly defined manner. This avoids conflict and confusion later on in the performance review cycle
M	Measurable	There has to be a form of measurement in the objective which is meaningful and motivational to give team members and managers a clear indication to know if the objectives were met or not. To increase the clarity objectives are best written in quantifiable terms using specific numbers or percentages.
A	Achievable	Is the objective actually achievable and possible? Remember that these should be reasonable given the market conditions, resources available, level and position.
R	Relevant	Does the objective meet the long-term result of the larger objectives of the business? They should be written as a tangible result or deliverable that the team member will produce. E.g. increase production.
T	Time Bound	Clearly state when the objective will be achieved. Using targeted project milestones and due dates help team members and managers monitor progress. This allows for corrections during the performance year and enables team members and managers understand the accountability to the overall department goal.

Aligned Objectives

A few basic questions a Team Member can ask to ensure their objectives are aligned to their manager's business goals:

- Do they represent growth to my manager and the organisation?
- Do they enhance department and group goals?
- Do they reflect the priorities of the department and group?

- Do they support my manager's goals?

Objective Formula

A useful mnemonic when creating objectives is:

Action word + key result + target date + conditions

Examples of SMART Objectives

Description	Measure
Find European partners for our new product range	Identify at least two partners who will sell £1M of our product by fiscal year end
Ensure all team members have had training needs identified in line with their performance objectives	Completion of development plans for all team members by 31 st December each year
Develop and deliver a complete product plan for x that defines departmental strategy, implementation steps and timescales.	By end of 2 nd financial quarter all product managers will have been communicated the plan
Close an average of 14 customer support calls per week	Customer satisfaction will increase in the survey produced yearly and the backlog of customer calls will decrease by <4 per week average

Writing Job Descriptions

A well written Job Description clarifies to the team member what is expected of them and is the basis for measuring job performance. It should be written in an unambiguous way.

Key Responsibilities

Recommended ways to define key responsibilities or main tasks are:

- Produce a list of 20-30 main tasks/activities.
- Think about:
 - Processes, planning, monitoring, reporting, resources, information, inputs and outputs involved.
 - Percentage of time spent on the tasks/activities
 - Making sure the lists are in relation to outputs rather than describing the actual job
 - Being clear about the accountability for results and resources
- Refine this list by grouping them together, find themes. Try and keep the themes to a minimum of 9/10 activities to avoid the job description being over complex. Consider putting these under headings/clusters
- Rank the list in order of importance
- Sense check that everything in the list is genuinely important and achievable

The Job Description

Tips when writing the job description:

- Think of the duties you want the person in the role to hold rather than describing the person in the roles preferred responsibilities
- Try to be concise and factual as possible
- What is the broad picture of the job and how does this clearly distinguish from other jobs
- Avoid jargon ensure the sentence starts with a doing verb eg. Plans and Organises, Prepares, Maintains, Produces, Provides, Monitors, Creates, Develops
- Use verbs to distinguish responsibilities ie Manages, Supervises, Responsible for
- Describe what is done after the verb as succinctly as possible ie updates and sets team targets, Communicates (think in relation to whom, what, how)
- State briefly the purpose of what is done in terms of what needs to be achieved. Eg Sets team targets to ensure end of year financial target is achieved for the business
- Emphasise the outputs in terms of results expected so it will be easy to agree performance objectives e.g. Prepare and implement skills development programmes to meet the business needs, To maintain an efficient sales follow up system

Do not put targets as they are a moving output which will need flexible control

Do not put comments such as 'must achieve sales target' – this does not describe the job it is purely an output. Describe the activity required to ensure that targets will be met

Other Areas

Most jobs may involve carrying out other activities from time to time.

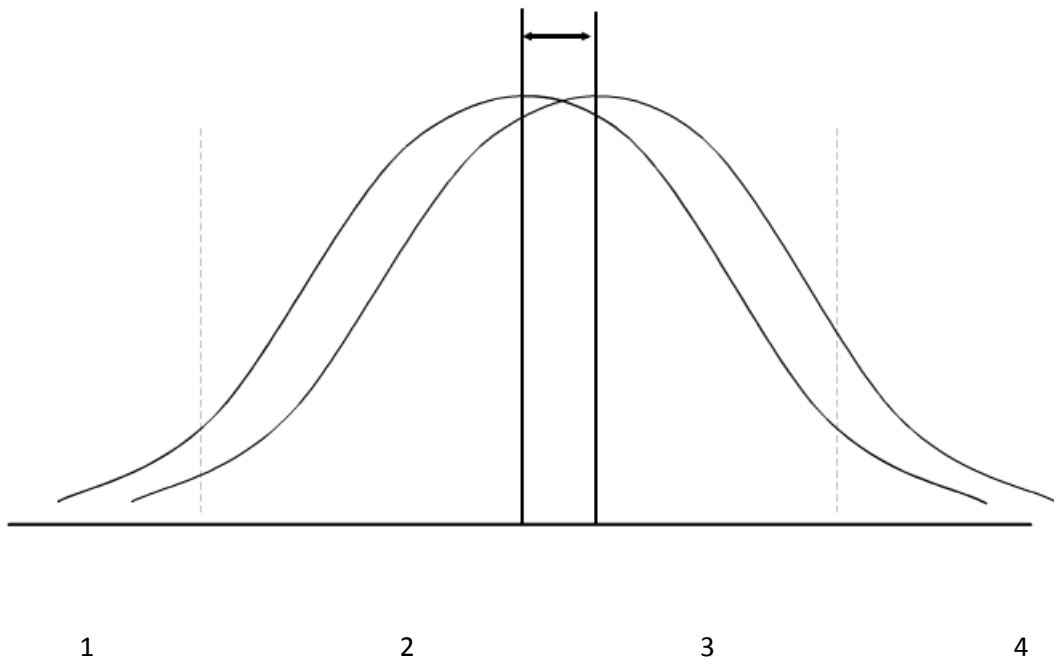
Some examples:

- Is evening work involved?
- What sort of projects does the person get involved with – consider things like: how is it organised, prioritised, planning
- Who does this person communicate with predominantly i.e. internal or external clients
- Consider if this person has any responsibilities for other team members and what that involves.
- Are there any other specific duties you would like to call out?

Effective Performance Reviews

Using the Performance Rating Scale

When using the rating scale (example below) the distribution curve shows in an organisation where you would likely to see most of the organisations performance ratings. The midpoint in this example is between 2 and 3. When rating team members the 1 is showing minimal poor performers and 4 showing minimal top performers. In ideal performance management processes the way managers should manage team members is to shift the distribution curve to the right – poor performers are pushed to become better performers and top performers are stretched and challenged to become even better.



An example using a 4 point scale

Exceeds expectations (4)	The team member consistently performs at a level often above and beyond the skills indicated for the target level of their role.
Meets Expectations (3)	The team member consistently performs the skills needed for the target level of their role.
Below Expectations (2)	The team member sometimes demonstrates the skills needed for the target level of their role. Further development or improvement is required.
Development Need (1)	The team member is not demonstrates the skills needed for the target level of their role. Further development or improvement is required.

Writing Performance Review Comments

DO	DO NOT
Use short, familiar words	Use long and complex sentences
Use specific examples	Include your opinions
Be precise (use exact words and numbers)	Use ambiguous words
Use the second person singular (“You are...” rather than “He is...”)	Make assumptions or conclusions drawn from speculation
State facts and observed behaviors	Use technical jargon that might be unfamiliar to the team member

Suggested Language for Positive Attributes

Active	Adaptable	Ambitious	Artistic
Adventurous	Alert	Appreciative	Assertive
Calm	Capable	Clear Thinking	Competent
Confident	Conscientious	Consistent	Cooperative
Creative	Determined	Discrete	Effective
Energetic	Efficient	Enthusiastic	Flexible
Focused	Friendly	Helpful	Honest
Imaginative	Independent	Insightful	Intelligent
Logical	Loyal	Mature	Methodical
Motivating	Optimistic	Organised	Original
Patient	Practical	Precise	Realistic
Responsible	Reliable	Steady	Tactful
Thorough	Understanding	Resourceful	Outgoing

Suggested Language for Developmental Attributes

Ambiguous	Apprehensive	Argumentative	Authoritative
Belligerent	Blunt	Biased	Careless
Critical	Cynical	Defiant	Dependent
Disorderly	Disorganised	Distracted	Domineering
Emotional	Fearful	Frustrated	Hasty
Hostile	Indecisive	Inefficient	Inflexible
Inconsistent	Incompetent	Negative	Intimidating
Negligent	Pessimistic	Preoccupied	Short sighted
Submissive	Uncommunicative	Unreliable	Vague

Writing Your Self Performance Review

When writing review comments it may help to think about your accomplishments to enable you to provide proactive, meaningful input to your manager about the results achieved during the performance review period

- Review the objectives that you and your manager agreed upon for the review period. Highlight the most significant accomplishments and achievements and prepare a list for the entire performance year.

- Make the connection between what was achieved and done and why this matters to the results of the Company. Think of why the Company is better off because of this achievement or contribution remembering to be able to describe the tangible benefits.
- Think about your 2-3 strongest skills and how you applied them in achieving the objectives. Describe the overall results and impact that these had on the department/Company.
- Think about 2-3 skills that are a development area for you in the next performance year. This will help when drafting the development plan to focus on your next move to the next level in your role/career.
- Collect data that relates to your performance over the entire performance period.

Receiving Feedback during a Performance Review

During the performance review the manager will at times provide feedback on the team member's performance. How you receive and react to the feedback is important. Although you would expect most feedback to be motivational typically leaving a team member with a positive experience there are sometimes occasions when a team member will receive feedback that they disagree with and sometimes this may turn into a debate especially if it is related to non performance.

It is important to benefit from managers feedback, below are some tips when receiving feedback.

When receiving feedback, try to:

- Actively look and listen for useful information which may help you improve your performance.
- Remain objective and calm.
- Accept the fact that some feedback can be uncomfortable. Be willing to admit that you made a mistake.
- Accept the giver's point of view (whether or not you agree with it).
- Pause and reflect before responding. Make sure you hear the entire message before reacting
- Don't seek to justify or become defensive. - maintain an open mind and be willing to consider change.
- Summarise to test your understanding and look for ways to make improvements with your manager
- Remain open to suggestions.
- Thank your manager for giving you their feedback to you

Assessing Skills

Mapping the skills of your team against current and future requirements can identify skills gaps.

- Use rating scale descriptions that are tailored to the skill.
- Avoid rating scales based purely on months or years of experience.
- Avoid rating scales that force applicants to compare themselves to others.
- Get subject matter expert input.

The starting point is to know what skills and talents your team member has.

Put together a skills portfolio of all their skills that captures all their experience to date by thinking of their achievements

- Match the skills against the skills required for the role.
- What evidence can the team member give?
- Choose the rating that best describes the ability of the team member against the skill – NOTE this needs to be absolute in relation to the skills being assessed and NOT in comparison to their peers or your current job grade.

Examples of Skills

- Problem solving skills
- Time management
- Foreign languages
- Product knowledge

Make sure you have a framework that captures the meanings of the different rating scales ie product knowledge

Basic

- Basic working knowledge of systems & concepts
- Applies knowledge in generally routine or standard situations

Intermediate

- Sound Knowledge of systems & concepts
- Able to apply knowledge in solving basic problems,
- Is aware of, and demonstrates through work practices that he/she is keeping abreast of, development in the relevant discipline

Fully Skilled

- Sound Knowledge of systems & concepts
- Deals confidently with complex technical problems
- Is proactive in keeping current with new tools, methods and techniques in the relevant discipline
- May serve as an internal resource for the relevant discipline

Expert

- Expert Knowledge in advanced concepts

- Deals confidently & creatively with complex technical problems, presenting different technical scenarios and approaches
- Specialist knowledge with minimum preparation
- Shares new knowledge proactively with others

N/A

- No or not applicable knowledge

How to Write the Skills Relating to the Team Member

Basic

I have basic understanding and know how to write computer code. I am able to use the current search utilities to find information.

Intermediate

I've done backups and recoveries myself. I understand the different types of backup and can solve basic problems.

Fully Skilled

I've done all type of backup many times. I can perform complex recovery and solve most of the issues relating to it with the relevant resources and tools. I may serve as an internal resource to deal with backup and recovery issues.

Expert

I know everything about backup & recovery including its internals, I am capable of writing backup & recovery procedures and able to solve any problems with the right tools and resources. I share my knowledge with others through presenting programmes

Managing Succession in Your Organisation

Identifying the right people to fill key roles within your organisation either now or in the future will enable you to develop their knowledge and skills and abilities to prepare them for promotion and give them even more challenging roles. It will help you retain team members as they will understand and appreciate the time, attention and development you have invested in them. Successful succession planning will allow you to identify where you have no people as successors - the gaps - for key roles.

To effectively carry out succession planning in your organisation:

1. You must identify the organisations long term goals – recognise your organisational culture and understand if it will need to change in the future.
2. Focus on the “*what*” you want to achieve through the succession plan not the “*who*” and consider the potential successors on their individual merits and not because they remind you of yourself.
3. Start to plan early so you can weigh all options and make the right decisions for your company.
4. Identify what talents and skill sets will be needed to continue to lead the organisation in the future.
5. To search out your high potentials and high performers – look for employees who have strong talents and skills to help the business grow.
6. You need to understand and identify the development needs of your team members and make sure the right employees with the right aspirations are ready for key roles now and in the future.
7. You must ensure that all team members understand their career paths and roles they are being developed to fill.
8. You need to focus resources on key employee retention.
9. Understanding your business/employment trends to know which roles in the future might be difficult to fill externally.
10. Extend succession plans as far down the chain as possible and encourage people to step in for others during vacations to build on your organisations expertise.

Managing Key Talent in Your Organisation

A Talent Strategy should address key leverage points in order to increase the quality and consistency of the talent base, for example:

- Improve the calibre & performance of existing talent.
- Prepare high potential employees for their next promotion.
- Retain the best people, skills and knowledge.
- Focus development efforts where it will reap rewards.
- Supports development activity in the business and avoids a 'one size fits all' approach
- A consistent approach to rewarding and developing talent.
- Develop 'home grown' as well as externally recruited people; lower cost and better motivation.
- Ensure you have the skills and talent you need for the future.

Performance and Potential

Talent is usually assessed using two dimensions:

Performance

Assessment of performance rating is usually taken from the most current performance review. Performance rating usually reflects the performance against objectives and skills required for a team member's role and overall contribution

Potential

Potential is more subjective and based on qualitative assessment. It is about looking forward and predicating what a team member could be capable of in the future. Whether a team member is ready to move up within the organisation or stay where they are.

Do not typecast people into a category as their performance and potential changes, and can be developed.

Potential and performance shift over time – e.g. a promotion or change in job can result in performance levels dropping for a short term whilst the person adjusts to the challenges of the new job.

If you discuss the talent plan with your team member take care to position your feedback carefully. Discuss what you see as the team member's key strengths and talents and where you see opportunity for them to develop.

Performance vs. Potential Grid

When discussing Talent in your organisation looking at both Potential vs. Performance is useful to see critical resources and evaluating your organisations talent pool. This is often plotted in a 3x3 grid – sometimes called the “Talent Management Nine-Box Grid” (similar grids can be constructed with different scales). Each box has appropriate strategies and actions for managing people with that mix of potential and performance.

P o t e n t i a l	H i g h	High potential and low performance: ENIGMA High potential to advance further although underperforming Maybe in wrong job/wrong manager; needs intervention	High potential and medium performance: GROWTH EMPLOYEE Demonstrates high potential to advance further Valued talent, challenge, reward, recognise and develop	High potential and high performance: FUTURE LEADER Highest potential – best for senior succession Top talent, reward, recognise, promote, develop
	M e d i u m	Medium potential and low performance: DILEMMA Likely to have scope to move one level/ challenge is necessary as underperforming. May have lost pace with the changes in organisation Provide coaching	Medium potential and medium performance: CORE EMPLOYEE Likely to have scope to move one level/ challenge is necessary as underperforming. May have lost pace with the changes in organisation Motivate, engage and reward	Medium potential and high performance: HIGH IMPACT PERFORMER Likely to have scope to move one level/ challenge is necessary as underperforming. May have lost pace with the changes in organisation Strong contributor, challenge, reward, grow and motivate
	L o w	Low potential and low performance: UNDER PERFORMER Has reached job potential and is underperforming Performance manage or exit	Low potential and medium performance: EFFECTIVE Specialised or expert talent – reached career potential Engage, focus, motivate	Low potential and high performance: TRUSTED PROFESSIONAL Specialised or expert talent – reached career potential Retain, reward, help with developing others
		Low	Medium	High
Performance >>				

Competency Assessment and 360 Feedback

How do I choose assessors?

Unlike the more traditional evaluation methods between a manager and employee, the 360° assessment process is a multi-rater system, involving information from your manager, peers, customers, direct reports, and yourself. A broad range of feedback is collected and tabulated, resulting in a competency profile for the behaviours assessed.

The purpose of the feedback is to assist you in understanding your strengths and weaknesses, and to contribute insights into aspects of your work that may need further development.

So, when considering who to select and involve in providing feedback you should:

- Select individuals with whom you have interacted in a variety of situations and on a frequent basis for at least 6 months.
- Choose individuals who will provide honest and accurate feedback.
- Choose a mix of individuals – include those with whom you have a good relationship with as well as those who you find more challenging. This will provide a more balanced view.
- Have at least 2 respondents per respondent type/category. This also includes your self-assessment and typically at least one manager.
- Both you and your manager will be required to complete feedback questionnaires.
- Let your respondents know their feedback will be anonymous

You are required to select a minimum of three assessors per category. If less than three are selected, or if less than three replies are received, the data will be combined into another category. Overall results cannot be provided when less than 4 respondents have completed the questionnaire.

Giving and Receiving Feedback

Feedback is about helping people to be more aware of what they do and how it impacts on others in order to help them determine whether or not their behaviour is having the effect they want. Giving and receiving feedback requires courage, tact, honesty, understanding and respect from both parties.

Giving Feedback

When giving feedback, try to:

- Focus on the behaviour rather than the person.
- Describe specific rather than general behaviour and give examples.
- Focus on the behaviour you observed not what you interpreted or concluded from it.
- Do it in a mutually agreed and timely manner.
- Direct it towards behaviour which the receiver can do something about.
- Give it for the receiver's use, not as a release for your own feelings or frustrations.
- Allow the receiver to choose what they do with the feedback.
- Share the positive as well as the negative.

Receiving Feedback

When receiving feedback, try to:

- Actively look for useful information which may help you improve your performance.
- Remain objective and calm.
- Accept the giver's point of view (whether or not you agree with it).
- Pause and reflect before responding.
- Don't seek to justify or become defensive.
- Summarise to test your understanding.
- Be prepared to change your mind.
- Remain open to suggestions.
- Seek feedback from several people rather than just one.

Things to Consider

The following characteristics form an "ideal" model for feedback.

Good feedback is:

SPECIFIC	Related to specific actions and events rather than statements which are generalised or ambiguous.
DIRECTED	Towards behaviour, not personality. It is easier and less threatening for the receiver to cope with feedback on what they do, not what they are.
ACTIONABLE	Focusing on behaviour on which the receiver is capable of working. Reminding people of shortcomings over which they have no control only produces frustration and a sense of hopelessness.
TIMELY	Feedback stored for a grand ceremonial debriefing may focus on behaviour that was unnoticed or has been forgotten. Feedback given before passions have subsided will seldom generate a reflective response.
FOCUSED ON CONSEQUENCES	Rather than causes. The giver of feedback is seldom able to accurately interpret motive or intention.
OFFERS OPTIONS	Opening possibilities and choices for the receiver, rather than imposing solutions and thus creating resentments or dependencies.

Values

Values most likely to enable helpful feedback are: -

- A belief in honesty, tempered by sense of discretion.
- An unconditional positive regard for the individual.
- A belief in a person's potential for enhanced performance.
- A belief that the feedback offered will help the recipient.

Coaching a 360 Feedback Session

Preparing for the Meeting

Give yourself at least 1 hour to go through the report

Things to consider when studying the report

- Develop hypothesis – your own list of questions
- What picture do I get of this person – his/her relationships, situation and the role
- What are the discrepancies and interdependencies in the information, both top level and detail
- The range used for the feedback scoring
- Does this person know what competencies are important for his/her role
- Test assumptions by considering if the detail of the information supports the top level assumptions
- Look for consistency in the feedback
- Look for blind spots
- Look for different ways of interpreting the information i.e. are the discrepancies in the feedback associated with the subject or the feedback givers?
- What are the options – the possible reasons or explanations for the particular feedback given
- How senior / junior the subject is in the position. This could affect the range of scoring i.e. the more senior the person is, the higher the expectations on their competence levels compared to somebody more junior.
- Differences in how people are using the range of scores. – e.g. 1 to 5 or 2 to 4. Remember the cultural differences affecting this.
- Read the comments. When reading the comments, it helps to divide them to positive and developmental to help focus
- Do not over analyse
- Empty your head – you have not got your own agenda and pre-conceived ideas on what should be said

Running the Meeting: Questions You Might Ask

Ask whom they have chosen to give them feedback – establish who are their peers, direct reports and managers in the report and what are their working relationships like with these people.

Don't give them answers; ask questions to get them to find the answers themselves.

Think about peeling an onion when asking the questions – start with the outer layer and peel.

Outer Layer Questions:

- Have you already formed any opinions and what are they?
- What are your overall impressions about your feedback? How do you feel about it?
- What are the areas you would like to focus on?

- Why do you feel you want to work on these and why is it important to you? - Gives you the choice on how you approach the rest of the report – i.e. they may just want to focus on business acumen – could go to this in the report and work back
- Compared to your own perceptions how have the other(group)s evaluated you
- Which areas appear to be your strengths?
- In which areas are your ratings lower? Why?

Inner Layer Questions:

- Why might your manager/peers/direct reports be saying this?
- There are some differences in perception, I am very curious: How can these differences exist?
- Why is this possible? Why that might be?
- Can you think of a situation that might have brought this on?
- Why did that happen? How did you feel?
- What does this means to you?
- Do you want to change this? How can you change this?
- This low/high rating here, where do you think it might have come from?
- Suppose it was your best friend saying these comments - how would you take it?
- Why would your peers / manager / direct reports see this as a strength? What causes that?
- Is this expected to be a strength?
- How can you build on your areas of strength?
- What can you do to improve your development areas?

Reading Your Own 360 Feedback Report

If you are in receipt of your report the best approach to interpreting your report is to remember the purpose of doing the assessment feedback – it is to identify strengths and areas of development and indicate priorities for your improvement. The assessment feedback report shows how direct reports, manager(s) and colleagues etc perceive your behaviour and the impact it has on them. When looking at the data concentrate on recognising patterns in your data rather than examining in-depth the individual scores

When reading the report and analysing the data ask your self the following questions:

- What are the key messages?
- What are my strengths and development areas?
- What strengths can I build on?
- Why might a particular group have rated me as they have – are they best placed to comment on my performance in relation to this behaviour?
- Is there agreement among rater groups and what are their similarities / differences?
- How might individuals have arrived at their particular ratings?
- Can I use the comments to understand what interaction(s) the raters might have been referring to?

Remember, the report is all about perception - while that is not necessarily the 'truth' it does reflect how someone sees you.

Having reviewed and interpreted your report you should be able to:

- Identify three or four strengths and understand how you are going to build on them to improve performance.
- Identify three or four development areas and understand how you are going to change your behaviour in order to improve performance.

Receiving Feedback

At the end of the competency assessment you will receive feedback. How you receive and react to the feedback is important. Although you would expect most feedback to be motivational typically leaving a team member with a positive experience there are sometimes occasions when a team member will receive feedback that they disagree with and sometimes this may turn into a debate especially if it is related to non performance.

It is important to benefit from managers feedback, below are some tips when receiving feedback.

When receiving feedback, try to:

- Actively look and listen for useful information which may help you improve your performance.
- Remain objective and calm.
- Accept the fact that some feedback can be uncomfortable. Be willing to admit that you made a mistake.
- Accept the giver's point of view (whether or not you agree with it).
- Pause and reflect before responding. Make sure you hear the entire message before reacting
- Don't seek to justify or become defensive. - maintain an open mind and be willing to consider change.
- Summarise to test your understanding and look for ways to make improvements with your manager
- Remain open to suggestions.
- Thank your manager for giving you their feedback to you

F. Setup and Administration

Getting Started

Fairsail is a comprehensive tool for managing and enabling your teams. We recommend that you take a short while to familiarise yourself with the concepts and capabilities before starting an implementation.

A Fairsail trial comes with some demonstration data. This is the record for a mini team, frozen part way through using many of the processes. Take a walk through a manager's view of this mini team. Click on the Team Managers tab on the [HR Manager app](#) to see the [Team Managers](#) summary. If you haven't yet entered information of your own you will see Jane Fastrise and her mini team. Click on her name to see her [Team Summary](#). Then click on "Eric Hardworker" to see his [Team Member Manager's Summary](#) view. Click on each of the [Performance Management](#), [Talent](#) and [Development](#) sub-tabs to see all of the processes.

Entering Your Information

Add the other HR managers as [users](#). Give them the "HR Manager" profile unless they are to have full security-level access in which case make the "HR Administrator" profile.

Create department(s) remembering to add you and/or other user(s) as the [HR manager\(s\)](#) for those departments. Read the [department](#) instructions first since a "department" may not be the same as one of your organization's departments. Consider if you need more than one [policy](#) for those departments.

Now start adding your employees as [team members](#). Enter the managers first as registered users with a profile of "[Team Manager](#)". Then enter team members with a profile of "[Team Member](#)". People who are both (middle managers) must have the "Team Manager" profile. Managers must be registered users but team members need not (unless they are to play an active part in the processes).

A registered user must be licensed to use Fairsail. You must purchase a sufficient number of licenses for all of your registers users from Fairsail. At a minimum this includes all your HR and team managers. Ideally it also includes the team members too.

Team members can be imported in bulk to the system. You can also tie Fairsail directly to your HR or payroll system to automatically send data in/out of Fairsail. Talk to your Fairsail Success Manager for advice on this.

Communicate, Communicate, Communicate

Getting your organization's information into Fairsail is just the start. You now have to communicate the new processes and system to your colleagues. The basic rule of thumb is that you can't spend too much time and effort on this. The more you do the more you will get back and the more Fairsail will empower your team.

Departments

Departments are used in Fairsail to link HR managers and policies to team members. A "Department" is simply a group of team members that are looked after by one or more HR managers to which a given set of HR policies are applied.

If all your company is looked after by the same HR manager(s) and all your team members have the same HR policies then you only need one department. Conversely if you have several HR managers each looking after a different division and/or you wish to apply different policies to different groups of people then you will need multiple departments.

Fairsail trial sites start off with a single department "Trial Department" linked to the policy "Standard Policy" with the system administrator as the HR manager.

HR Managers

Defines which Fairsail registered users can see and control a department as an HR manager. Those users will also need to have HR Manager, HR Administrator or System Administrator user profiles. An HR manager can see (and optionally change) any the information held on the team members in the [department](#).

To assign a user to a department go to the Department view for the appropriate department. Do this by clicking on a department name anywhere in Fairsail or navigating to the department home from the Departments tab and then clicking on a department's name.

HR Managers are listed in the HR Manager related list for the department. Change an HR manager by clicking on Edit against the user. Add a new HR manager by pressing the "New" button on the top of the related list.

The information for an HR manager is:

User	A link to the registered user .
Department	A link to the department the above user is to access as an HR manager.
Access Level	Either "Read" or "Edit". Must be "Edit" for the user to be able to change any of the information that being HR manager gives them access.

After changing an HR manager you must [recalculate sharing](#) for the department concerned for the new access rights to take effect.

Recalculate Sharing for a Department

Making a change to a department can have a big impact on who can see which information. Fairsail must recalculate the sharing rules across of the team members, managers and HR managers in that department. This can take some time. Start the process by pressing the "Recalculate Sharing" button on the department view.

If departments get large and you have many years of team member records, it is possible that recalculate sharing will exceed processing limits. If that occurs, you will get an error message to tell you. You will then need to split the department into multiple departments with smaller numbers of team members.

Policies

Policies are used to specify which Fairsail processes are operational and how the processes operate for each of the team members. A single set of policies is linked to each single department. All of the team members in that department operate under the specified policy.

If all your people will operate under the same policy then you only need the one policy set. As many departments as you wish can run off that single policy set. Changes to that policy will then affect all departments using it. If you require different groups of team members to have different policies applied then you will need to create multiple policies and departments and place the team members in appropriate departments for the policies.

Fairsail trial sites start off with a single “Standard Policy”.

The data in a policy is:

Summary Start Date	Cut off date for target and objective information in the Team Member views. Items before this date will not appear in the summary.
Targets	If checked show Targets process on the Team and Team Member views.
Objectives	If checked show Objectives process on the Team and Team Member views.
Job Description	If checked show Job Description process on the Team and Team Member views.
Performance Reviews	If checked show Performance Review process on the Team and Team Member views.
Skills	If checked show Skills process on the Team and Team Member views.
Succession Plans	If checked show Succession Plan process on the Team and Team Member views.
Talent Plans	If checked show Talent Plan process on the Team and Team Member views.
Competency Assessments	If checked show Competency Assessment process on the Team and Team Member views.
Development Plans	If checked show Development Needs process on the Team and Team Member views.
Year Start Month	Sets the month of the default year start in new objectives and targets.
Start Day	Sets the day of the default year start in new objectives and targets.
Months to New Year Rollover	Set the number of months before the above default year start that new objectives and target will default to starting in the forthcoming year rather than the current year. This assumes that targets or objects entered at the end of the year are more likely to new ones rather than very late ones.
Require Approval For Performance Review	Controls if the “Reveal” button appears to the manager for draft performance reviews. That forces the performance review to be approved before it can be revealed by the manager.

Performance Review Repeat	The number of months in the future that Next Performance Review Date is incremented by when a review is completed. That controls when the manager is next prompted to start the next review.
Job Description Match Grades	If checked only show items in the job description library of the same or blank grade to the team member when creating a new job description.
Job Description Repeat	The number of months in the future that Next Job Description Date is incremented by when a job description is completed. That controls when the manager is next prompted to check the job description.
Skills Repeat	The number of months in the future that Next Skills Date is incremented by when a skill is entered. That controls when the manager is next prompted to check the skills.
Talent Plan Repeat	The number of months in the future that Next Talent Plan Date is incremented by when a talent plan is entered. That controls when the manager is next prompted to check the talent plan.
Succession Repeat	The number of months in the future that Next Successors Date is incremented by when a successor is entered. That controls when the manager is next prompted to check the successors.
Require Self Assessment	Do not permit closing a competency assessment unless a self assessment has been done. Warns if starting without a self assessor. Does not require self assessment if the team member is not a registered user.
Require Manager Assessment	Do not permit closing a competency assessment unless a manager assessment has been done. Warns if starting without a manager assessor. Does not require manager assessment if manager is not a registered user.
Minimum Other Assessors	Do not permit closing a competency assessment unless at least this number of assessors (other than self and manager) has completed assessments. Warns if starting with fewer assessors.
Auto-complete Competency Assessment	If all assessors have finished their assessment and the above three rules are satisfied then Fairsail will automatically close the competency assessment when the last assessor completes their assessment.
Competency Assessment Repeat	Competency Assessment Date is incremented by when an assessment is completed. That controls when the manager is next prompted to start the next assessment.
Development Need Repeat	The number of months in the future that Next Development Need Date is incremented by when a development need is entered. That controls when the manager is next prompted to check the development needs.

These values, along with data in the [team member](#) record and [workflow](#), are used to configure and control powerful and flexible automated Fairsail processes within your organization. [Action](#) messages will flag to your managers and team members exactly when they need to do things according to the policies you set.

Team Members

Team Members are the base record for all of your employees. You must have a team member record for all the people about whom you are going to hold Fairsail information. As well as holding the basic employment information about a person, the team member record also links together other key records that control how the person is managed and the processes they will run.

Controlling records linked to Team Members:

Department	Required. Sets the department that the team member is in. In turn this sets the HR manager(s) that can see and edit the team member information and the policies that will apply to the team member.
Manager	Optional. Sets the primary manager for the team member. The primary manager will see the team member on their Team Summary view and be able to run the Fairsail processes as the manager. The manager link is to another team member record i.e. the manager is also a team member (in the next level up the organisation). Only the CEO (normally) will not have a manager set.
User	Optional. Sets the login details for the team member if they are going to be a registered user and take part in the Fairsail processes as the team member. If not set then the manager completes the management side of the HR processes without the team member taking any active part.
Management	Optional. Sets additional managers as cross-reporting managers. A cross-reporting manager will see the team member on their Team Summary view and be able to take part in many of the Fairsail processes as the manager.

New Team Member

Fairsail contains a wizard for creating new team members. This links them to the primary manager and department, and optionally links them to either a new or existing registered user. This is the best place to add new team member and/or users to Fairsail.

An HR Manager or HR Administrator starts the New Team Member wizard by

- a. Select “New Team Member” in the new item section of the left screen panel.
- b. Press the “New” button on the Team Members home.

A screen asks for the following details:

First name	New team member’s first name (or given name). Required.
Surname	New team member’s surname (or family name). Required.
Email	New team member’s email. Required and must be valid since it is used to send their login credentials.
Personnel number	Ideally a unique non-changing reference. Optional but very useful if you are going to transfer information to/from another system.
Manager	Select from a pull-down menu of all existing team members in Fairsail that are registered users with any profile other

	than “Team Member”. Optional (but highly recommended for all but top-level managers). Tip: enter your managers first.
Department	Select from a pull-down menu of Fairsail departments. This is not necessarily the same as your organization’s departments. See departments .
Is a registered user	Check if this team member is going to log in and actively use Fairsail processes. Managers must be registered users. Team members are recommended to be. See users .
Either: create new user	Check if this team member is not already a registered user of this Fairsail or Salesforce site or org. A new user will be created and details sent to the email address above. Ensure you have sufficient user licenses first.
Username	The login username for the new user. Required for new users. Defaults to the email given above. Must be unique across all Fairsail and Salesforce sites (i.e. not used anywhere before).
Profile	The profile of the new user. One of Team Manager, Team Member, or HR Manager. Required for new users. Controls what the new user can do in Fairsail. See profiles .
Or: link existing user	If not creating a new registered user then identify which of the existing users will be used. This option will not appear if there are no suitable users free from an existing team member record.

When you have entered the details press the “Save” button. Press the “Save and New” button if you wish to add another new team member.

If you have created a new user then that user will immediately receive an email from Fairsail giving their new login credentials. They are forced to change the password when they first login.

After creating the team member and user records you must maintain them separately. The team member record is accessible from the team member home. The user record is accessible from Setup->Manage Users->Users.

Edit Team Member

The Edit Team Member page lets you change employment and control information about the team member. Be careful what you change here since it can have a big impact on the processes and information that can be viewed by managers and team members.

Navigate to the Edit Team Member page by:

- a. Pressing the Edit button on the [Team Member Detail](#) view.
- b. Clicking an Edit link against a team member in one of the views on the Team Member home from the Team Member tab.

The information that can be edited on the team member is:

Name	The team member's name. The First Name and Surname joined together and cut to a maximum of 80 characters. This is used wherever the team member appears in a list or view. Required.
User	A link to the registered user record. This user will see this team member as their own information when logged in. Optional.
First Name	The first or given name. Optional after initial entry.
Surname	The surname or family name. Optional after initial entry.
Department	A link to the department record. This controls which HR managers can see this team member's information and the policies that will apply to the team member.
Manager	A link to the manager's team member record. Optional (but highly recommended for all but top-level managers).
Personnel Number	The personnel or employment number of the team member.
Unique Id	A unique reference for the team member. Uniqueness enforced by Fairsail. Could be the same as the personnel number (see above). But is there is any part of the organization that can have duplicate personnel numbers? Can the personnel number ever change? Sometimes there is a better choice for a unique number: a social security number or a randomly generated number from a master database. Optional but very useful if you are going to transfer information to/from another system.
Email	The email address for the employee.
Grade	The team member's organisational grade or level. Taken from a pull-down menu which you can customize to match your organisation's grade. Used by job description process to match library descriptions.
Hire Date	The date of first hiring of this team member. Used by workflow for automatic new employee or on-boarding processes.
Employment Status	Pull-down menu of "Active Employee", "Temporary Staff", "On Leave", or "Left". Add others to the list if you wish. The "On Leave" and "Left" team members are excluded from team lists.
Job Profile	The job profile containing the competency and skill requirements of the job. Used for the default job profile of the competency assessment process. Do not confuse with user profile.
Next Performance Review Date	The date the next performance review is due to run. If this date is today or in the past then the performance review due action flag appears against this team member on the manager's Team Summary. Set manually, by last process or workflow.
Next Job Description Date	The date the job description is due to be checked or entered. If this date is today or in the past then the job description due action flag appears against this team member on the manager's Team Summary. Set manually, by last process or workflow.
Next Skills Date	The date the skills are due to be checked or entered. If this date is today or in the past then the skills check action flag appears against this team member on the manager's Team Summary. Set manually, by last process or workflow.

Next Successors Date	The date the successors are due to be checked or entered. If this date is today or in the past then the successors check action flag appears against this team member on the manager's Team Summary. Set manually, by last process or workflow.
Next Talent Plan Date	The date the talent plan is due to be checked or entered. If this date is today or in the past then the talent plan action flag appears against this team member on the manager's Team Summary. Set manually, by last process or workflow.
Next Competency Assessment Date	The date the next competency assessment is due to run. If this date is today or in the past then the competency assessment due action flag appears against this team member on the manager's Team Summary. Set manually, by last process or workflow.
Next Development Needs Date	The date the development needs are due to be checked or entered. If this date is today or in the past then the development needs check action flag appears against this team member on the manager's Team Summary. Set manually, by last process or workflow.
Current Talent Plan	Link to the last entered talent plan for this team member. Set automatically by process. Used for reports.
Current Competency Assessment	Link to the last completed (closed) competency assessment for this team member. Set automatically by process. Used for reports.
Current Job Description	Link to the last entered the job description for this team member. Set automatically by process. Used for reports.
Current Performance Review	Link to the last completed (signed by manager) performance review for this team member. Set automatically by process. Used for reports.

Many of the fields in the team member record are set and controlled by the Fairsail processes, [policies](#), and [workflow](#). They only need to be entered or amended by hand if a mistake is made.

Cross Reporting

The management record or cross-report record allows you to allocate additional managers to the team member record beyond the primary manager. These additional managers will see the team member on their Team Summary view and be able to take part in many of the Fairsail processes as the manager.

Add new cross reporting managers by navigating to the Team Member Details view. Click on a team member to get to the Team Member Manager's Summary and then press the "All details" button at the top of that view.

The cross reporting managers are listed in the Management (Team Member) related list near the bottom. The people that cross report into this team member are in the adjacent Management (Cross Reporting) list. Add a new manager for this team member by pressing the "New" button on the Management (Team Member) list. Add a new team member to report into this current team member by pressing the "New" button on the Management (Cross Reporting) list.

A cross reporting manager is set to one of two access levels:

Read	The manager will see the team member in their Team Summary and be able to see Fairsail information for that team member.
Edit	In addition to the above the manager can enter and amend information as though they are the primary manager.

Team Managers

Team managers are simply team members that have other team members reporting into them. You do not need to enter “team managers” in any special place. Information on team managers is made up of:

- A team member record for the manager’s own Fairsail information. Except for the top level of your organisation a manager is also a team member for their own manager. Even top-level managers must have a Fairsail team member record if they are to use Fairsail.
- Other team members’ records with the manager’s team member record (see above) linked as the manager. Make this link through entering a [New Team Member](#) or by changing the manager on the [Team Member Edit](#) page.
- A registered user with a profile of Team Manager, HR Manager, HR Administrator or System Administrator. Make this link through entering a [New Team Member](#) or by changing the user on the [Team Member Edit](#) page.

If you are an HR manager you can see all the managers in your departments by clicking on the Team Managers tab to see the Team Managers view. This lists all your managers with a count of how many team members are linked directly to that manager. This list excludes managers and team members in departments you cannot see and team members set to “On Leave” or “Left” employment status.

Click on a manager’s name in the Team Managers view to see the [Team Summary](#) view just as that manager sees it. This shows you the team members reporting to that manager and actions due for all active processes.

Users

The list of users is the list of people that are registered to log in and use the Fairsail service. If your Fairsail implementation is on top of your Salesforce site/org then Fairsail and Salesforce users are one and the same. The user record contains login and license control information.

User records are linked from team member records. This link gives the user that is that team member. Do not link more than one team member record to single a user. You can have team members without users (team members that do not take any active part in any of the processes) or users without team member records (HR managers or system administrators).

You must have a Fairsail license for each active user. Make sure you have purchased licenses from Fairsail before adding users.

Users may be deactivated, but doing so prevents them from logging in and removes their links to data they have created. That data remains in Fairsail for the manager or HR manager to see. Deactivated users may be reused by others in the company, but do not automatically cease charges for the license. You need to check your licensing arrangement with Fairsail and talk to your Fairsail customer success manager.

View your users by clicking on Setup -> Manager Users -> Users. You must have access permission set to manage users to do this. The only information in the user record that is used by Fairsail is:

Username	Name used when logging in. Must be unique across all Fairsail and Salesforce sites. Usually starts off the same as the email address but can be changed independently.
Password	Cannot be seen by the administrator, but may be reset by them. This sends an email to the user with a new temporary password that must be changed on first use.
Email	Email address of the user. Must be valid as it is used in various processes.
Alias	A shortened name of the user.
Delegated Approver	A link to another user that is granted the administrator rights of this user. Is able to, for example, approve performance reviews on their behalf.
Profile	Controls what the user can do when they are logged in. The profiles for Fairsail are Team Member, Team Manager, HR Manager, HR Administrator and System Administrator.
Active	If not checked this user cannot login and cannot own data. Use for people that have left or who will no longer use Fairsail.
Email Encoding	Change if having problems with characters in emails.
Time Zone	The user time zone for time conversions in calendar etc.
Locale	The format for dates, times, etc.

The other fields (specifically Manager, Department, Role, etc) have NO effect on Fairsail. They are used exclusively for Salesforce processes. You may use the payroll number to help link user and team member records in data import.

Libraries

Job Description Library

Job Description Library Items are template job descriptions that can be used by team members to start off their [own job descriptions](#).

Job Profile

Job Profiles are sets of [competency](#) and [skill](#) requirements for jobs. They are used for [competency assessments](#) and setting [skills](#) and [development needs](#). Competency assessments require a job profile to specify the competencies and indicators that are to be assessed.

Scales

Scales are sets of possible responses used when assessing [competency indicators](#) and [skills](#). Scales have multiple [responses](#) and a variety of prompts and formats.

Scale Response

A scale response consists of a score, label and description.

The scores must start at 1 and increment by 1 for each additional response. A single “not applicable” or “not known” response may be entered with a special score of -1. The score is not shown at assessment time but is used in the results.

The label is used to select a response when assessing the competency [indicator](#) or giving the proficiency of a [skill](#). The description provides additional pop-up information to help explain the response.

Competency Library

Competency Library Items are behavioural competencies and [indicators](#) required by team members within your company. They are used when creating [job profiles](#). The job profiles are, in turn, used for [competency assessment](#). The competency library can hold simple lists of competencies or more complex anchored frameworks or job family models.

Indicator Library

Indicators are the individual questions or items used to assess a competency in the online questionnaire. Each indicator is assessed against the linked [scale](#).

Skill Library

Skill Library Items are technical skills and knowledge required by employees within your company. They are used when an employee adds a [skill](#) to their record to set their existing skill level and their [development needs](#).

Workflow

Fairsail is designed to take full advantage of the core Salesforce workflow technologies. The two together are a powerful combination. Workflow is configured very quickly and easily to implement a wide range of powerful automated HR procedures within an organization using Fairsail. Examples of use of workflow within Fairsail are:

- On-boarding or new employee induction processes.
- Scheduling of reviews and assessments with different rules for groups of team members based on region, grade, length of service, or any other information held within Fairsail.
- Processes that run either at the same time of year for all participants, or on the anniversary of starting the job, or at a set period after the last time the process was run.
- Scheduling of meetings and tasks to support Fairsail processes.
- Emails delivering reminders or information.

Workflow in Fairsail can bring significant advantages for your organization:

- Less HR administration and management of routine processes.
- Less time spent by managers and team members fulfilling their HR requirements.
- Increased control and accountability.
- Reliable information for making strategic decisions.

Included here are examples of some of the ways that workflow can help. Contact your Fairsail customer success manager for more information.

On-boarding or New Employee Induction

A few simple workflow rules added to Fairsail will automate the processes followed by your new hires and their managers. Consider the following scenario:

1. Team member follow an induction programme during the first few days.
2. Managers of new hires must set some objectives for them within the first two weeks.
3. After three months work new hires are given a competency assessment with an assessment by themselves and their manager.
4. After six months managers of new hires must give the new hire a performance review.
5. HR is notified if the first performance review is below a set rating.
6. Thereafter the new hire is placed on the company-wide annual performance review in December each year, unless the above review is within three months of that.

The workflow rules that are needed to support this scenario are:

- ❖ A rule on Team Member that fires when a team member is entered with a hire date in the last few days (depending on how often the team member data is entered). The rule does the following actions:
 - Send the induction email to the new hire. This gives them the schedule for the first few days and introduces them to the Fairsail system.
 - Send an email to the manager to remind them of the new-hire procedures and give the timetable for the next six months.

- ❖ A rule on Team Member that fires two weeks after the hire date if objectives have not been set.
 - Send the manager a reminder email.
- ❖ A rule on Team Member that fires three months after the hire date.
 - Sets the Next Competency Assessment Date to today making the Action flag appear on the Team Summary view for the manager.
 - Sends an email to the manager and team member informing them of the competency assessment process.
- ❖ A rule on Team Member that fires six months after the hire date.
 - Sets the Next Performance Review Date to today making the Action flag appear on the Team Summary view for the manager.
 - Sends an email to the manager and team member informing them of the review process.
- ❖ A rule on Performance Review that fires when a performance review is signed by the manager with a rating less than a set level with the hire date within the last seven months.
 - Sends an email to the HR manager informing them of the review.
- ❖ A rule on Performance Review that fires when a performance review is signed by the manager with a rating above a set level with the hire date within the last seven months.
 - Sets the Next Performance Review Date to the next December, unless within three months in which case the December after that.

These rules can be adapted and amended to suit a huge variety of on-board processes. A few simple workflow rules in Fairsail will do all the HR administration of your new hires.

Ask your Fairsail customer success manager if you need help adding your rules.

Email Prompting for 360 Degree Feedback

A few simple workflow rules added to Fairsail competency assessment adds considerable flexibility and automated control. Examples are:

1. Send an email to people that are being asked to make an assessment. The email gives a link to the online questionnaire (after entry of the assessor's password). It also gives a link to Fairsail's [tips for giving feedback](#).
2. Send reminder emails to assessors one day before the end date and final reminders between the end close dates.
3. Send an email to your HR coach when the competency assessment is due to close. Optionally, remove the close button from the manager and team member and give that task to the coach. The coach can then sit with the team member when they first see their results.

These rules can be adapted and amended to suit a huge variety of competency assessment processes with email prompting. However, Fairsail advises that you don't add too many automatic emails. People quickly ignore too frequent automated emails – or even set up inbox rules to “park” them if too insistent. You need to get a delicate balance between informing and nagging just right.

Ask your Fairsail customer success manager if you need help adding emails to this or other processes. Sample rules 1 and 2 above are included in your Fairsail free trial installation.

Actions

Actions are indicators that either the manager or team member has to do something within one of the Fairsail processes.

Action flags appear on the manager's Team Summary view against the team member and process to which they apply. If there is a manager activity for a process a red flag appears with a message saying what is due. If there is no manager activity, but there is a team member activity, then a yellow flag appears with a message describing what the team member must do.

Actions that relate to specific items (objectives, targets, performance reviews, job descriptions and competency assessments) are also listed in reports and on the tab views for the processes concerned. These enable a manager or HR manager to take a view of what needs doing within the people they are responsible for.

The actual action messages for each process are listed below along with the conditions that trigger them.

Objectives Actions

Manager and Team Member: "Add New". Appears when:

- Objectives process is active
- No objectives with today between the start date and end date

Manager: "Approve or Edit". Appears when:

- Objective status is "Team Member Draft" (has been edited by team member)

Team Member: "Confirm or Edit". Appears when:

- Objective status is "Manager Draft" (has been edited by manager)

Team Member and Manager: "Review"

- Objective status is "Active". Appears when:
- Objective Next Review Date is on or before today

Targets Actions

Manager: "Add New". Appears when:

- Targets process is active
- No targets with today between the start date and a year after the start date.

Team Member: "Confirm". Appears when:

- Target status is "Draft" (has been edited by manager)

Performance Review Actions

Manager: "New Due". Appears when:

- Performance review process is active
- Has no active performance review
- The Next Performance Review date is not blank and is today or in the past

After a performance review is complete the Next Performance Review is advanced by the number of Repeat Months. If the Next Performance Review is blank then it is set to the number of Repeat Months beyond the date the just completed performance review was originally started.

Manager: "Submit or Edit". Appears when:

- Performance review status is "Draft" and has not been submitted for approval

Manager: "Reveal". Appears when:

- Performance review status is "Approved"

Manager: "Sign". Appears when:

- Performance review status is "Revealed"
- Either: there is no self performance review, or the self performance review has been signed.

Team Member: "Reveal or Edit". Appears when:

- Self performance review status is "Draft"

Team Member: "Sign". Appears when:

- Self performance review status is "Revealed"
- Performance review status is "Revealed"

Job Description Actions

Manager: "Add New". Appears when:

- Job description process is active
- Has no draft job description
- The Next Job Description date is not blank and is today or in the past

After a job description is agreed then the Next Job Description date is advanced by the number of Repeat Months. If the Next Job Description is blank then it is set to the number of Repeat Months beyond the date the job description was created.

Manager: "Approve or Edit". Appears when:

- Job description status is "Team Member Draft" (has been edited by team member)

Team Member: "Confirm or Edit". Appears when:

- Job description is “Manager Draft” (has been edited by manager)

Skills Actions

Manager and Team Member: “Add New or Confirm”. Appears when:

- Skills process is active
- The Next Skills date is not blank and is today or in the past

After a skill is created or edited the Next Skills date is advanced by the number of Repeat Months. If the Next Skills is blank then it is set to the number of Repeat Months beyond the date the skill was created or edited.

Succession Plan Actions

Manager: “Add New or Confirm”. Appears when:

- Succession plan process is active
- The Next Successors date is not blank and is today or in the past

After a succession plan is created or edited the Next Succession Plan date is advanced by the number of Repeat Months. If the Next Succession Plan is blank then it is set to the number of Repeat Months beyond the date the succession plan was created or edited.

Talent Plan Actions

Manager: “Add New or Confirm”. Appears when:

- Talent plan process is active
- The Next Talent Plan date is not blank and is today or in the past

After a talent plan is created or edited the Next Talent Plan date is advanced by the number of Repeat Months. If the Next Talent Plan is blank then it is set to the number of Repeat Months beyond the date the talent plan was created or edited.

Competency Assessment Actions

Manager: “Add New”. Appears when:

- Competency assessment process is active
- Has no active competency assessment
- The Next Competency Assessment date is not blank and is today or in the past

After a competency assessment is complete the Next Competency Assessment is advanced by the number of Repeat Months. If the Next Competency Assessment is blank then it is set to the number of Repeat Months beyond the date the just completed competency assessment was originally started.

Manager and Team Member: “Start”. Appears when:

- The competency assessment has status “Draft”

Manager: “Manager assessment”. Appears when:

- The competency assessment has status “Active”
- There is a manager assessment still to be completed

Team Member: “Self assessment”. Appears when:

- The competency assessment has status “Active”
- There is a self assessment still to be completed

Manager and Team Member: “Close”. Appears when:

- The competency assessment has status “Active”
- Either: all assessments are completed, or the End Date is in the past

Development Needs Actions

Manager and Team Member: “Add New or Confirm”. Appears when:

- The Development Needs process is active
- The Next Development Needs date is not blank and is today or in the past
- Either: the team member has skills, or they have a completed competency assessment

After a development need is created or edited the Next Development Need date is advanced by the number of Repeat Months. If the Next Development Need is blank then it is set to the number of Repeat Months beyond the date the development need was created or edited.

Reports

Fairsail contains a set of predefined reports that can be used to monitor the Fairsail processes and analyse the results. They are used to support a whole set of strategic organizational decisions. Fairsail data is usually far more up-to-date and reliable than other sources of HR data in your company.

The pre-built reports are just the tip of the iceberg. The built-in report designer tool can customise these reports or add to them to precisely meet your needs.

Reports can be viewed online, printed or exported as data for spreadsheets and other computer systems. They provide a very flexible tool for extracting information from Fairsail.

Go to reports by clicking on the Reports tab in the HR Manager app. The HR Manager can configure reports so selected managers can run them directly. Anyone running a report is limited to just the information they have permission to see as either the HR manager of the department or as a manager or cross-reporting manager of the team members. Two people running the same report might, therefore, see different results. The system administrator will see all information.

You can go further and create dashboards that show summaries of reports on the home pages of users.