



Pick the Right Tool

Staff Appraisals:

A system-selection guide from eXplorance

No general-purpose feedback management (survey) system can be everything to everybody.

Many tools on the market claim to address many different information-gathering demands at once.

But they can require more time and effort, be less flexible, generate less satisfying results, and ultimately have a higher total cost of ownership (TCO).

This system-selection guide describes the key advantages of using a more specialized system to implement staff appraisals.

Smarter Staff Appraisals

In an age when finding and retaining good employees is a constant challenge, doing effective performance appraisals is more critical than ever.

The goal of an appraisal process is to help employees maintain and improve their individual job performances, realize their potential, and increase the effectiveness and efficiency of an organization as a whole.

Staff appraisals frame an ongoing discussion about workplace performance. Generally, both appraisee and appraiser fill out forms, then compare and discuss these during an interview.

The goal is to come to an agreement on performance targets and a professional development plan for the upcoming year.

A record of the interview is signed by both parties and kept on file.

It's almost impossible to handle proper staff appraisals with a general-purpose survey tool. The requirements of this process are just too complex.

A fully managed process in a company with 5,000 employees requires 10,000 surveys — one self-evaluation and manager-evaluation for each employee. To be effective over time, the surveys need to be stored and compared to track each person's progress and compare their stated goals with their results. This is clearly impossible for the unmanaged public survey format of a general-purpose feedback management system.

eXplorance offers a software module specifically built for staff appraisals, called **Blue/Appraisals** that provides the controls and reporting capabilities you need for a successful appraisals process. It also understands the relationships that exist between subjects and respondents in your organization to help you share results with the appropriate parties.

To help you pick the right tool for your staff appraisals process, the following table sums up some useful questions to ask potential vendors and shows how the features of Blue/Appraisals stack up to a general-purpose survey tool.

Questions to Ask Your Vendor

QUESTIONS	GENERAL-PURPOSE SURVEY TOOL	BLUE/APPRAISALS
Is the system smart enough to allocate the appropriate review form to the appropriate rater?	NO Requires a public form where managers/employees decide which employee to review.	YES A centralized project links the appropriate raters with the appropriate reviewees.
Does the system allow you to set objectives for the upcoming evaluation process? And does the system allow delegation of rater-selection to reviewees or their managers?	NO	YES With optional approval.
Can you sum up the results demographically, by employee, department, age, gender, and so on?	NO May be achieved through export to XLS and manual manipulation of results.	YES
Does the system understand the hierarchy in the organization, including direct and indirect relationships?	NO	YES The system can allocate different rules for different people.
Does the system have an integrated workflow to help manage the process?	NO	YES
Can you apply different deadlines to different reviews?	NO	YES
Can the system guarantee that only the appropriate raters review the appropriate employees? And only once?	NO Raters may respond more than once to same form, or evaluate the wrong employees.	YES The process is fully managed and controlled. Form sharing and performance notes are also allowed.
Can the system track who did their reviews and who didn't?	NO Unless the surveys are implemented as multiple surveys with a decentralized management.	YES Management is centralized per project, which is defined by a complete set of evaluations.
Does the system include an approval process, such as digital signatures, to enable electronic sign-off on results?	NO	YES Fully centralized and managed to ensure that each appraisal form is electronically signed by appropriate stakeholders.
Can you analyze an employee's developmental needs over time?	NO May be achieved through export to XLS and manual manipulation of results.	YES
Does the system allow you to compute complex performance results? And can you tie these to raises?	NO	YES Includes competency scores, performance total score, gap analysis, competency and goal breakdown, and ranking report. Also includes a calculated raise.