

Truvelop™

**MANAGEMENT
TRAINING**

**EVALUATE. DEVELOP.
PERFORM.**

Why Truvelop?

Talent evaluation and development that's efficient and effective with the power to transform workplace performance and engagement.

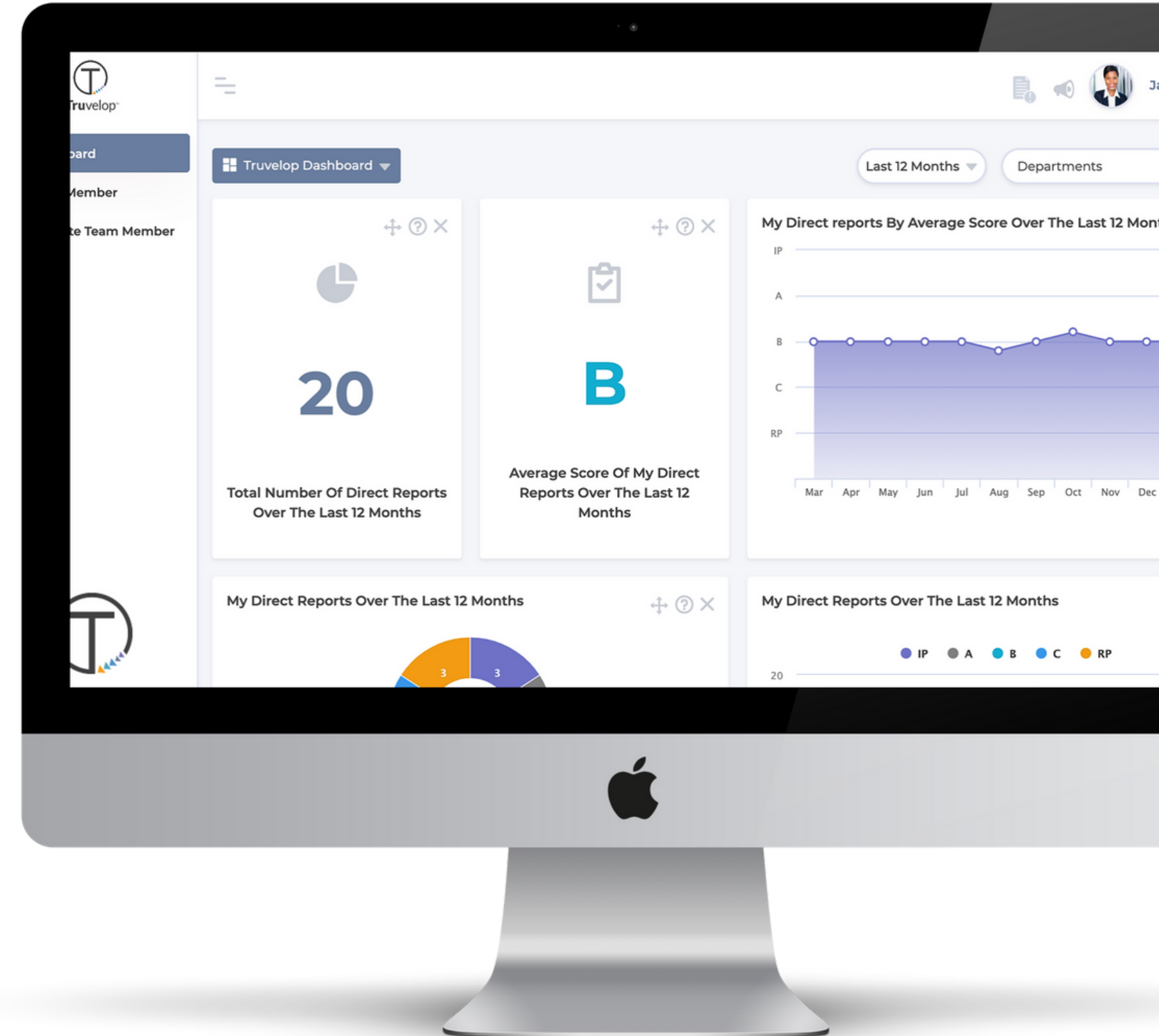
Introduction

- 1) Purpose of Truvelop
- 2) Utilization Goals
- 3) Next Steps

Purpose of Truvelop



- Adopt **continuous performance management & development strategy**
- Provide **real-time feedback** to employees in the moment when it counts
- Focus on **developmental objectives for all employees**
- Create a **culture of transparency** across the organization
- Provide managers with **micro-learning training** resources
- **Mitigate risk** associated with employment decisions



Continuous Performance Development



Quarterly

Managers sit down with Team Members to set and check in on goals. Understand your shifting talent landscape and start to analyze performance trends.

Year End Review

Celebrate achievements and identify growth opportunities & areas to focus on in the year ahead!

Monthly

Celebrate growth from the previous month, check-in on development progress, and identify focus areas for the upcoming period.

Weekly

Evaluate your team, share recognition, coach and guide your Team towards their performance goals.

Daily

Support development & retention with ongoing, real-time feedback on strengths & growth opportunities.

Initial Talent Assessment

Establish a baseline of our talent landscape & identify talent gaps.

What's in it for you?

No more high pressure,
bulky annual review
process



Simple Evaluation
process - takes 2 to 3
minutes to complete

Getting rid of the "set it
and forget it" feedback
strategy



Easy feedback
documentation with
Sparks for you to
reference and check-in
on in the moment

Now that you've
completed the
evaluation, what do you
do about it?



Evaluation Insights and
the Knowledge Center
take the guess work out
of it and gives you guided
action items forward

Truvelop Launch January 2022

Manager Utilization Goals

- Download the app
- Get into the system and get comfortable
- Complete baseline evaluation
- Spark weekly and Evaluate quarterly
- Focus on developmental opportunities
- Follow management insights to start increasing meaningful touchpoints
- Use Truvelop to manage documentation requirements

Employee Experience Goals

- Download the app
- Increase engagement and meaningful touch points
- Better employee experience
- Focus on development
- Improve two-way communication
- Employees will be brought into the App tomorrow

How does it work?



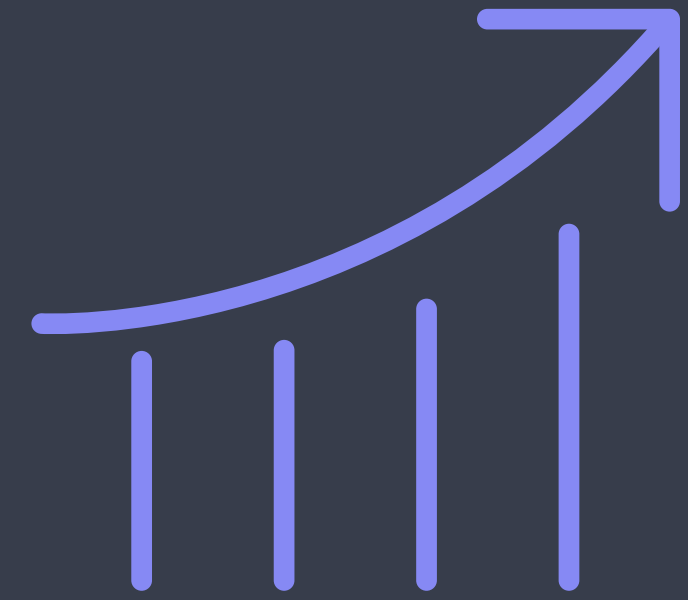
Evaluate

- Managers evaluate their team members **regularly on a quarterly basis**
- **Evaluation scoring** helps identify a current baseline for where each team member stands today
- Each team member will fall into one a **scoring category** A, B, C...etc. Know your team!
- Avoid **rater bias**, be consistent and avoid rating certain employees harsher or easier than others. Be objective and fair.



Develop

- Each score includes a **Manager Action** with guidance on how to best manage and develop the team member.
- Know your team: Use the **scoring recommendations** to Celebrate, Motivate, Educate team members.
- Identify **developmental opportunities** for all team members.



Perform

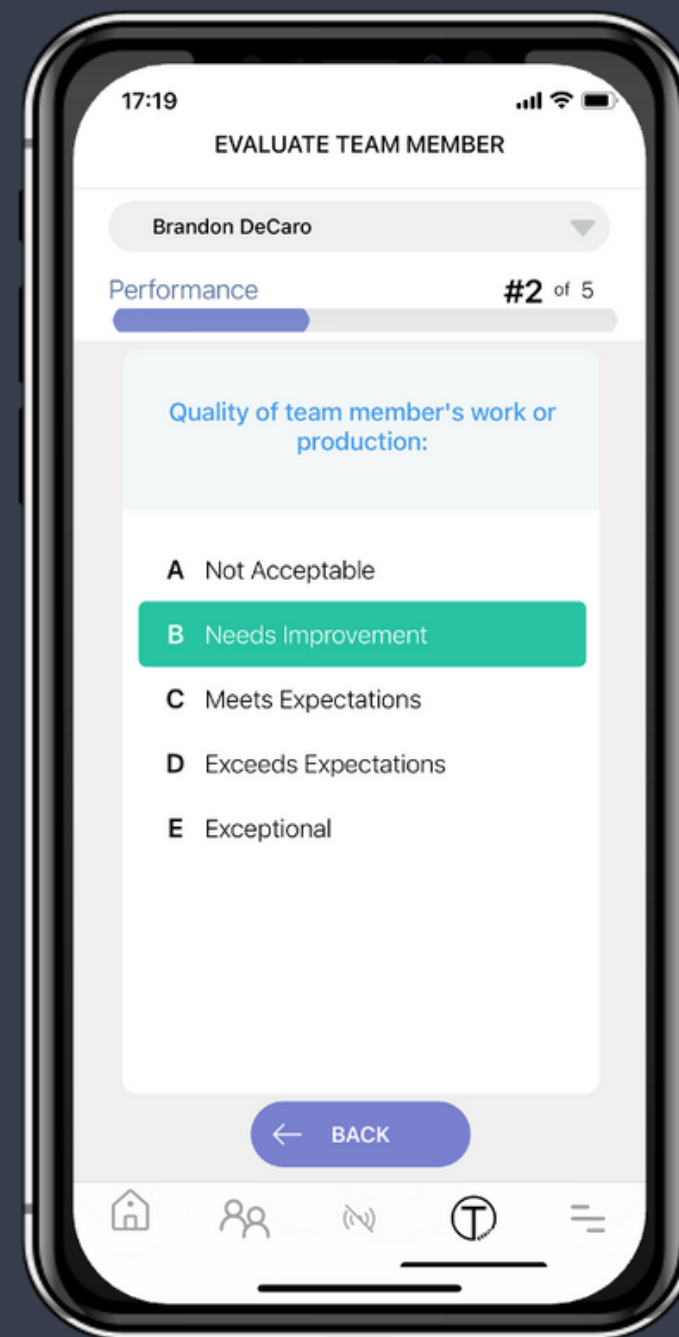
- Use **Spark** to deliver frequent, **real-time feedback** to team members via email or text.
- Spark is your direct tie to team members. Use Spark to memorialize one on ones, track new Goals, identify dev opportunities, coaching/ counseling.
- **Spark** regularly - at least twice a week.

The more touch points the better to increase engagement and build trust.

Evaluate

Develop

Perform

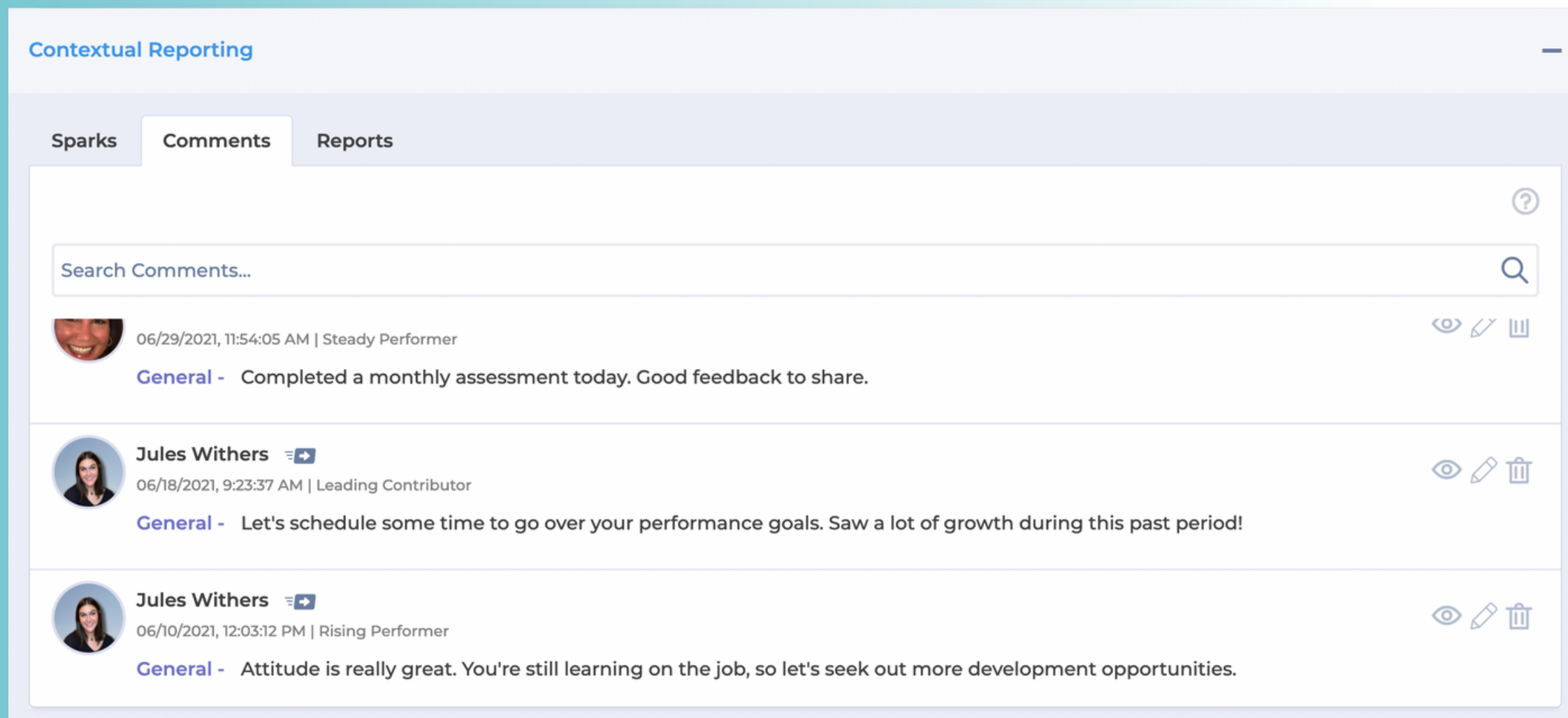


- Managers evaluate their staff **quarterly**
- **Evaluation scoring** helps identify a current baseline for where each employee stands today
- Each employee will fall into one **scoring category** A, B, C...etc. Know your team!
- Be sure to add **comments** that you can reference later
- Avoid **rater bias**, be consistent and avoid rating certain employees harsher or easier than others. Be objective and fair.
- Use the **Mobile App** – super easy!

93% of employees in a recent LinkedIn report stated that they would stay at a company longer if it invested in their career.

Adding Comments

Evaluating an employee is important, but the **context** is even more valuable. Leaving comments and attachments in evaluations not only provides more information on the team member, but also memorializes accomplishments and enriches your data.



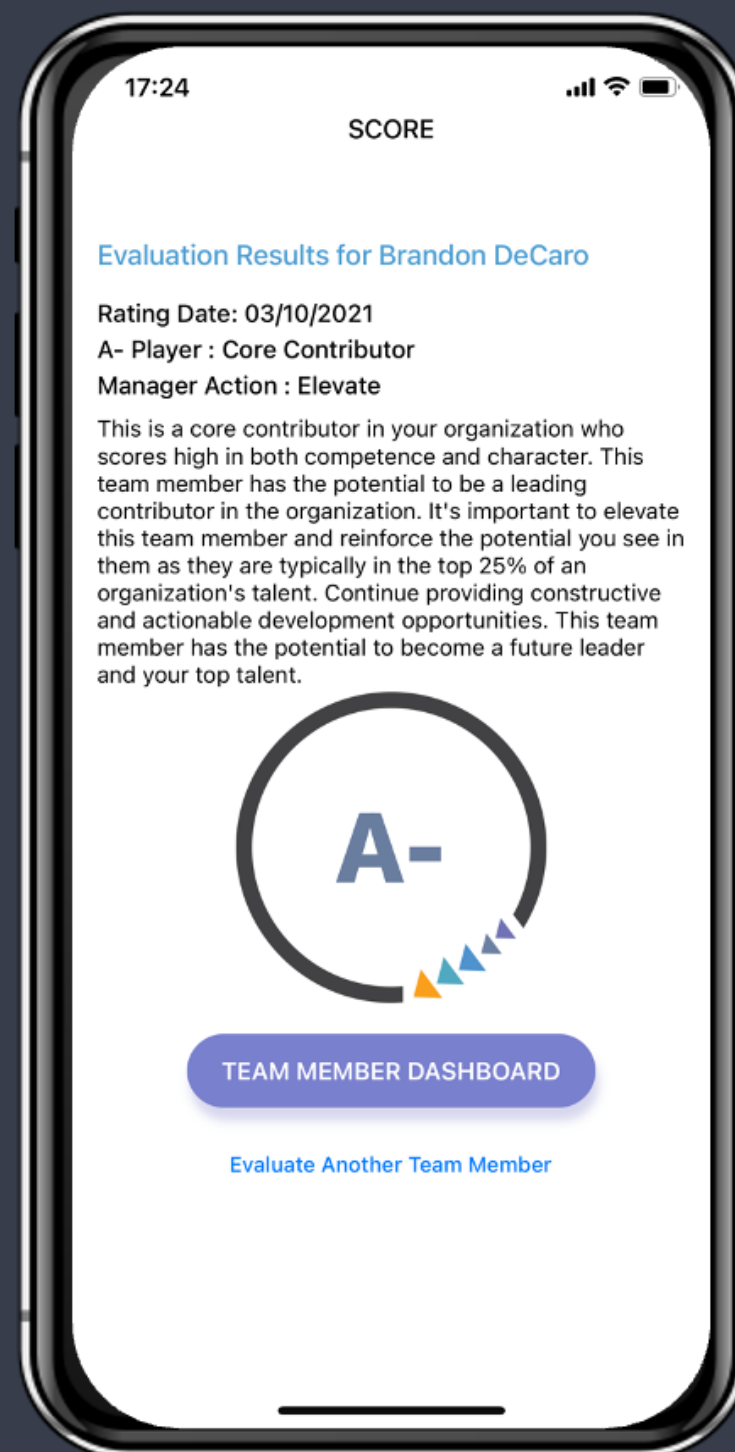
All contextual data can be found in **Contextual Reporting** on any team member's dashboard.

All it takes is a couple extra minutes per evaluation to keep all contextual data on team member performance, attitude, and maintenance all in one place on Truvelop.

Evaluate

Develop

Perform



- Each score includes a **Manager Action** with guidance on how to best manage and develop the employee.
- Use the **scoring recommendations** to Celebrate, Motivate, Educate employees.
- Who are the **top performers** on your team? Recognize and praise!
- Who are the **low performers** on your team? Coach and counsel!
- Identify **developmental opportunities** for all employees.

Organizations that have made a strategic investment in employee development report **11% greater profitability** and are **twice as likely to retain their employees.** (Gallup)

Scoring Insights for Manager

Exceptional Contributor	<p>This is an exceptional contributor in your organization who scores high in both competence and character. This is an exemplary performer and represents your top talent. You and other leaders should reach out to this team member immediately and let them know they are valued. Celebrate this team member (possible raise, promotion or special project). Without taking action, your organization runs a high risk of losing this talent because this team member will attract attention from other organizations and recruiters. Replacement cost of this team member is extremely high and would represent a major loss to the organization.</p>
Leading Contributor	<p>This is a leading contributor in your organization who scores high in both competence and character. This team member gives you a large competitive advantage. Appreciate this team member (possible raise, promotion or special project). Show them they are valued as they typically represent the top 15% of an organization's talent. Focused development of this team member is your priority as they are the leading talent of the organization.</p>
Core Contributor	<p>This is a core contributor in your organization who scores high in both competence and character. This team member has the potential to be a leading contributor in the organization. It's important to elevate this team member and reinforce the potential you see in them as they are typically in the top 25% of an organization's talent. Continue providing constructive and actionable development opportunities. This team member has the potential to become a future leader and your top talent.</p>
Rising Performer	<p>This is a rising performer in your organization who is currently giving your organization an advantage over much of the competition. This team member shows up every day ready to perform and is contributing on average above their peers. This team member consistently delivers and has good behavioral competencies. Emphasize ways in which they can increase initiative and independence. Invigorate this team member to become an A-player.</p>
Steady Performer	<p>This is a steady performer in your organization who helps your organization maintain a competitive position in the marketplace. This is the type of team member who shows up every day and delivers reliable performance and has adequate behavioral competencies. The question is, does this team member have the motivation and potential to contribute at a higher level? You as the manager should guide this team member to where they should focus on improvement. Motivate this team member to explore their potential.</p>
Improvement Performer	<p>This is an improvement performer typically in the lower 35% of an organization's talent. They are contributing below their peers but have the potential to improve. Provide coaching to educate this team member on areas of primary concern regarding overall performance and/or attitude. Typically, performance of day to day activities and/or attitude toward the team member's work is limiting their improvement potential. Provide straight forward feedback. Closely follow their response to your feedback and their ability to act on it positively.</p>
Lagging Performer	<p>This is a lagging performer typically in the lowest 15% of an organization's talent. This team member fills a role but gives you no competitive advantage. This team member is filling a role. Evaluate the team member's capacity for improvement. Provide simple, straight forward feedback. Closely follow their response to your feedback and their ability to act on it positively.</p>
Low Performer	<p>This is a low performer typically in the lowest 10% of an organization's talent. This team member fills a role but gives you no competitive advantage. This team member is filling a role until you can either help them improve or replace them. This team member requires careful evaluation to manage improvement. Consider developing a performance improvement plan for this team member. Monitor their overall performance closely.</p>
Under Performing	<p>This is an underperforming member of your organization. This team member fills a role but gives you no competitive advantage. You have assessed this team member as one of the lowest contributors to your organization. You need to immediately mitigate the team member's under performance or face the decision of replacing them. Consider whether this team member is in the right role based on the team member's skill set or motivation. This team member should be placed on a performance improvement plan and their overall performance closely monitored against the agreed upon plan.</p>
Not Performing	<p>This is an underperforming member of your organization whose performance provides a competitive disadvantage and will eventually diminish your organization's brand strength. This team member is a potential liability for the organization, or the team member is currently in the wrong role. Their negative performance, attitude, and/or impact on your brand needs to be mitigated. Determine whether the team member is better suited for a different role within the organization. Engage with HR and/or Senior Leadership to explore all options for this team member before considering a termination decision.</p>

Option to Send Email

Email Preview



Hi **Beryl**,

You have a new evaluation score. **Meryl Goeke** wants to share the following evaluation score and feedback with you.

Evaluation Date: Monday, April 19, 2021

Summary: Improvement Performer

Details: Your performance and overall contribution are currently below the average of your peers, but we see the opportunity for you to improve. Review areas of your day to day performance and your attitude that may be holding you back. To further develop your potential, seek feedback from your

DON'T SEND EMAIL

SEND EMAIL

Scoring Insights for Employee

Exceptional Contributor

You are a valued, **exceptional contributor** to this organization's success and one of our top team members. Continue to engage, lead by example, be creative and seek out opportunities to sustain and expand your contributions and development. Your engagement and continued growth are a priority for our organization.

Leading Contributor

You are a **leading contributor** to the success of this organization. Keep doing what you are doing. Your efforts matter and are being noticed. Your strong performance and positive attitude are having an impact. You make us a better organization. Your engagement and continued growth are a priority for our organization.

Core Contributor

You are a **core contributor** to the success of this organization. Your continued focus and passion to solve day to day problems is developing you into a leading contributor. Continue on the path you are on and look for opportunities to expand your contributions. Your engagement and continued growth are a priority for our organization.

Rising Performer

You are viewed as a **rising performer** within the organization. Keep up the good work and positive attitude. You consistently come to work ready to perform and make a positive impact. You are on the right track! If you are motivated to improve then engage with your manager(s) to identify development opportunities and educate yourself on where you can continue to improve.

Steady Performer

You are a **steady performer** and contributor to our organization. Self-reflect on where you could expand your impact or role within the organization. To further your development, review your day to day performance and your attitude towards your work to identify where you may have growth potential. Seek feedback from your manager(s) and co-workers on where you should focus.

Improvement Performer

Your performance and overall contribution are currently **below the average of your peers**, but we see the opportunity for you to improve. Review areas of your day to day performance and your attitude that may be holding you back. To further develop your potential, seek feedback from your manager(s) and co-workers on where you should focus your attention and activities.

Lagging Performer

Your overall performance is **lagging behind** your peers. Speak with your manager about any current challenges you are facing. Improving your performance begins with openness to coaching and willingness to take feedback.

Low Performer

Your overall performance is significantly **lagging behind** your peers. Speak with your manager about any current challenges you are facing. Taking small steps immediately to act on feedback you are receiving can create positive change.

Under Performing

Your overall performance is **significantly below expectations**. Immediate improvement is needed. Speak with your manager right away to understand where you are falling short of expectations.

Not Performing

Your overall **performance is significantly below** acceptable standards. Immediate improvement is needed. Speak with your manager right away to understand where you are falling short of expectations and what steps you need to take to demonstrate improvement.

Use Manager Insights on Team Member Dashboard



Truvelop's Event-Based Performance Analysis uses qualifiers within the scoring algorithm to flag responses that are indicative of areas the manager should pay special attention to such as recognition, departure risk, developmental needs, opportunities for improvement or growth, detractors/barriers.

Manager Action for Team Member ?

B- Player: Improvement Performer | **Manager Action:** Educate

This is an improvement performer typically in the lower 35% of an organization's talent. They are contributing below their peers but have the potential to improve. Provide coaching to educate this team member on areas of primary concern regarding overall performance and/or attitude. Typically, performance of day to day activities and/or attitude toward the team member's work is limiting their improvement potential. Provide straight forward feedback. Closely follow their response to your feedback and their ability to act on it positively.

Evaluation Insight ?

Quality Description - New to Role

Date - 04-19-2021

Status - This team member is new to their role and may still be learning what success looks like. Set clear goals and expectations. Provide regular coaching and learning opportunities to ensure success and acclimation. This team member will need extra attention and reassurance.

Trend Status ?

Quality Description - Trending Downward

Date - 04-19-2021

Status - This team member's overall scores are trending downward. Step in immediately to understand what has changed. Work with the team member to identify steps to be taken to help the team member get back on track.

Use Manager Insights on Team Member Dashboard

Manager Actions help managers understand where the team member stands today and identifies actionable steps to manage growth & development.



Manager Action for Team Member ?

B- Player: Improvement Performer | **Manager Action:** Educate

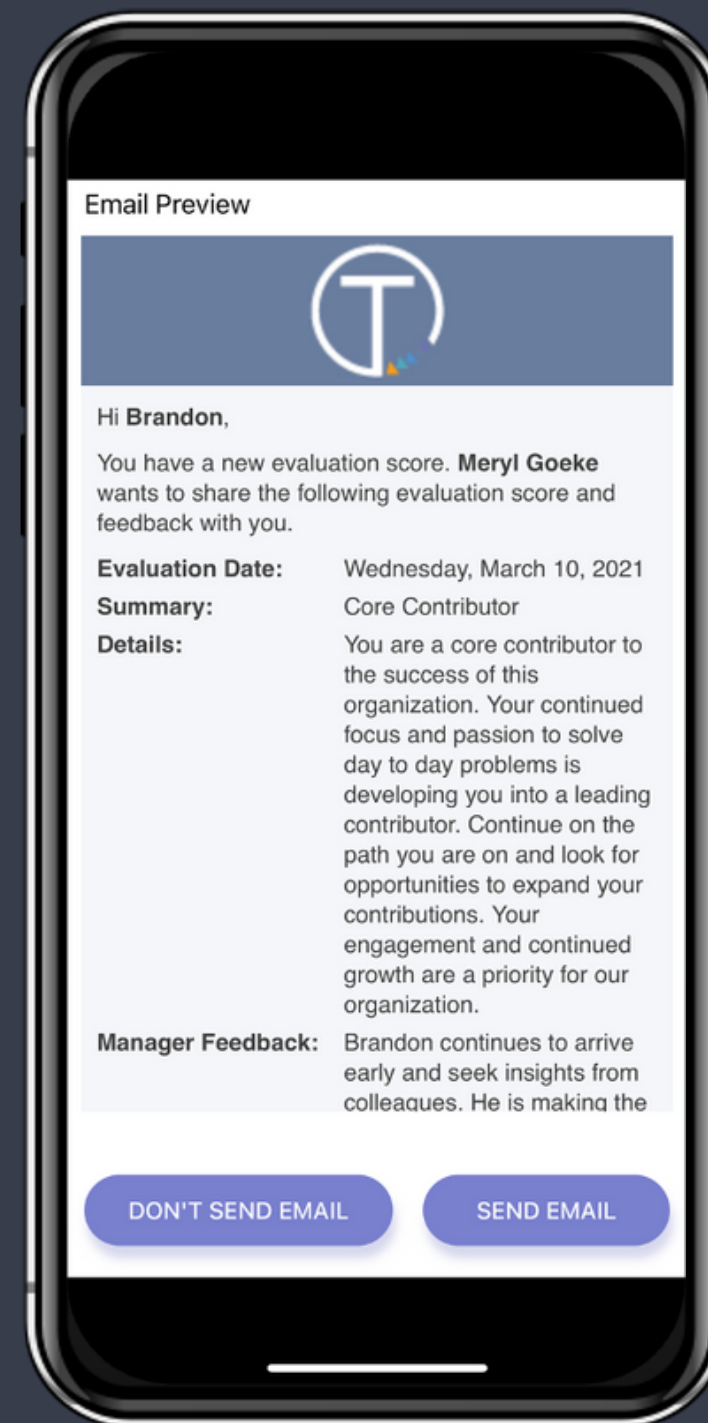
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Use Manager Insights on Team Member Dashboard

Evaluation Insights and Trend Status provide deeper data driven insights based on Evaluation trends and performance patterns.

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Evaluate Develop Perform



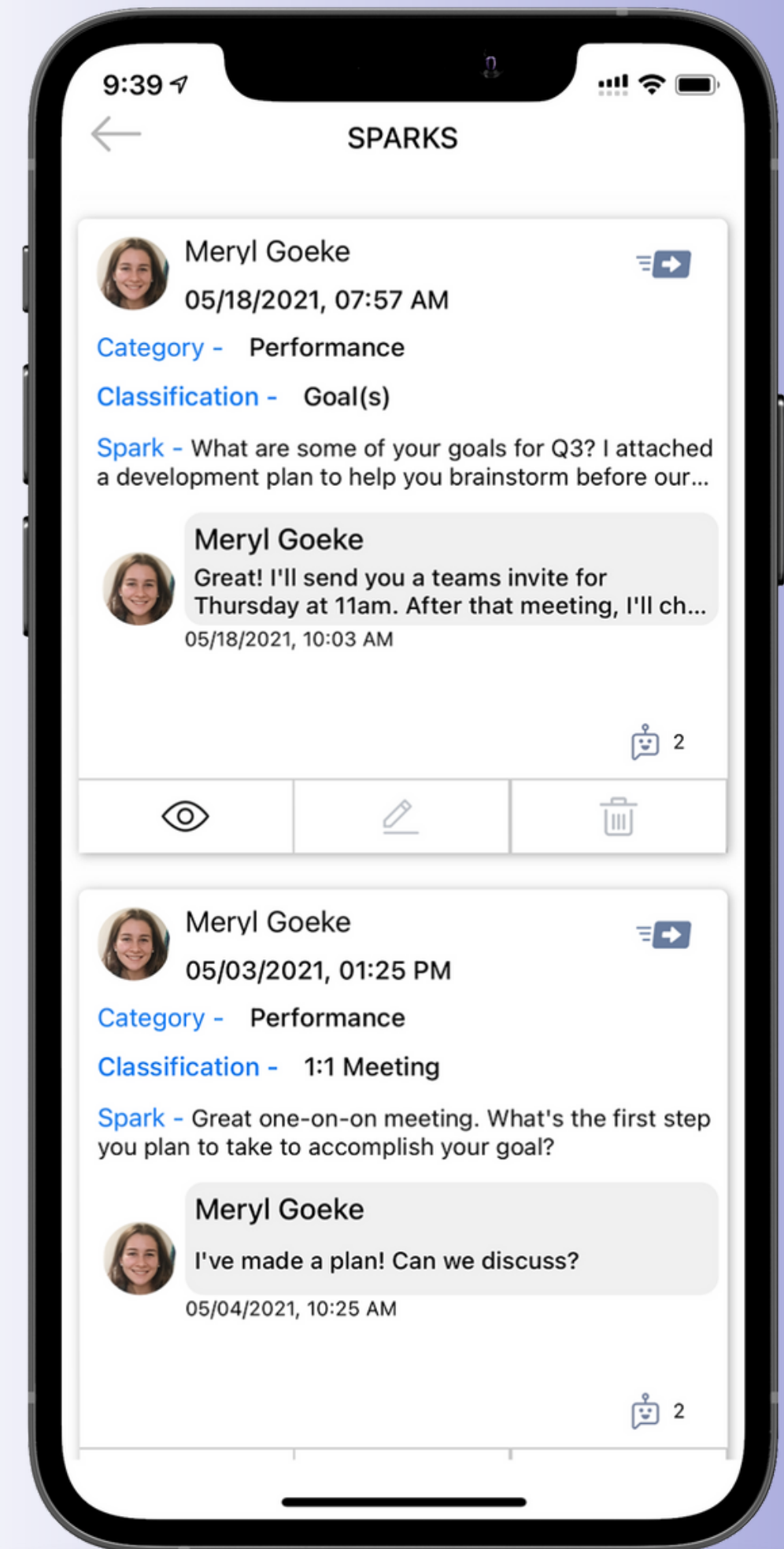
- Use **Spark** to deliver frequent, **real-time feedback** to team members via email or text.
- Spark is your direct tie to your employees. Use Spark to memorialize one on ones, tracking new Goals, identifying dev opportunities, coaching/counseling.
- **Don't forget to share the feedback with the employee!**
- **Spark** as much as possible (twice a week).
- The more touch points the better to increase **engagement** and **build trust**.
- **Mitigate risk** in the event of separation or layoff with consistent documentation available in the app.

Employees who believe that their company has a higher purpose over just making a profit are 27% more likely to stay at their current organization. (TinyPulse)

4 Ways to Use Spark

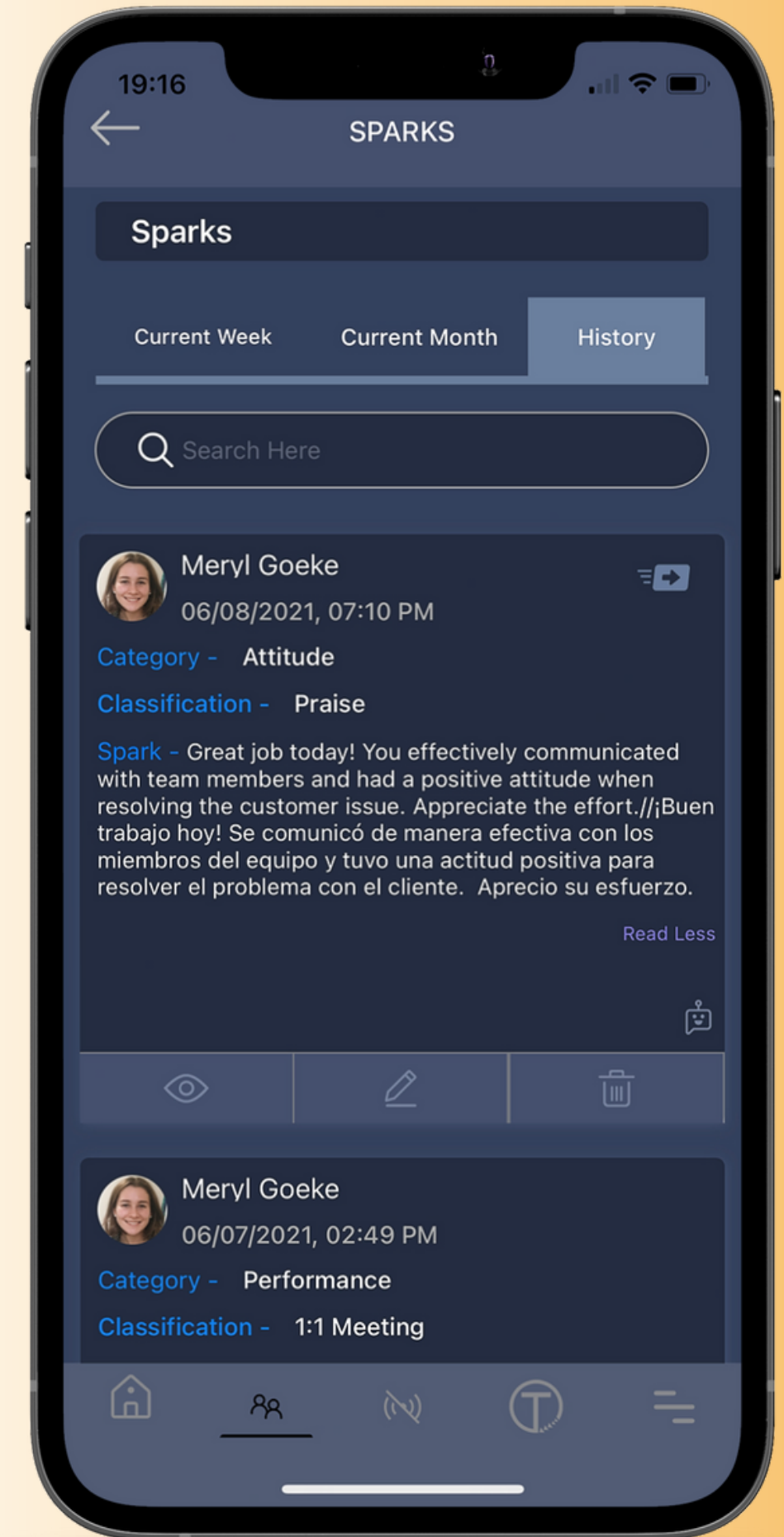
#1 Set and Review Goals

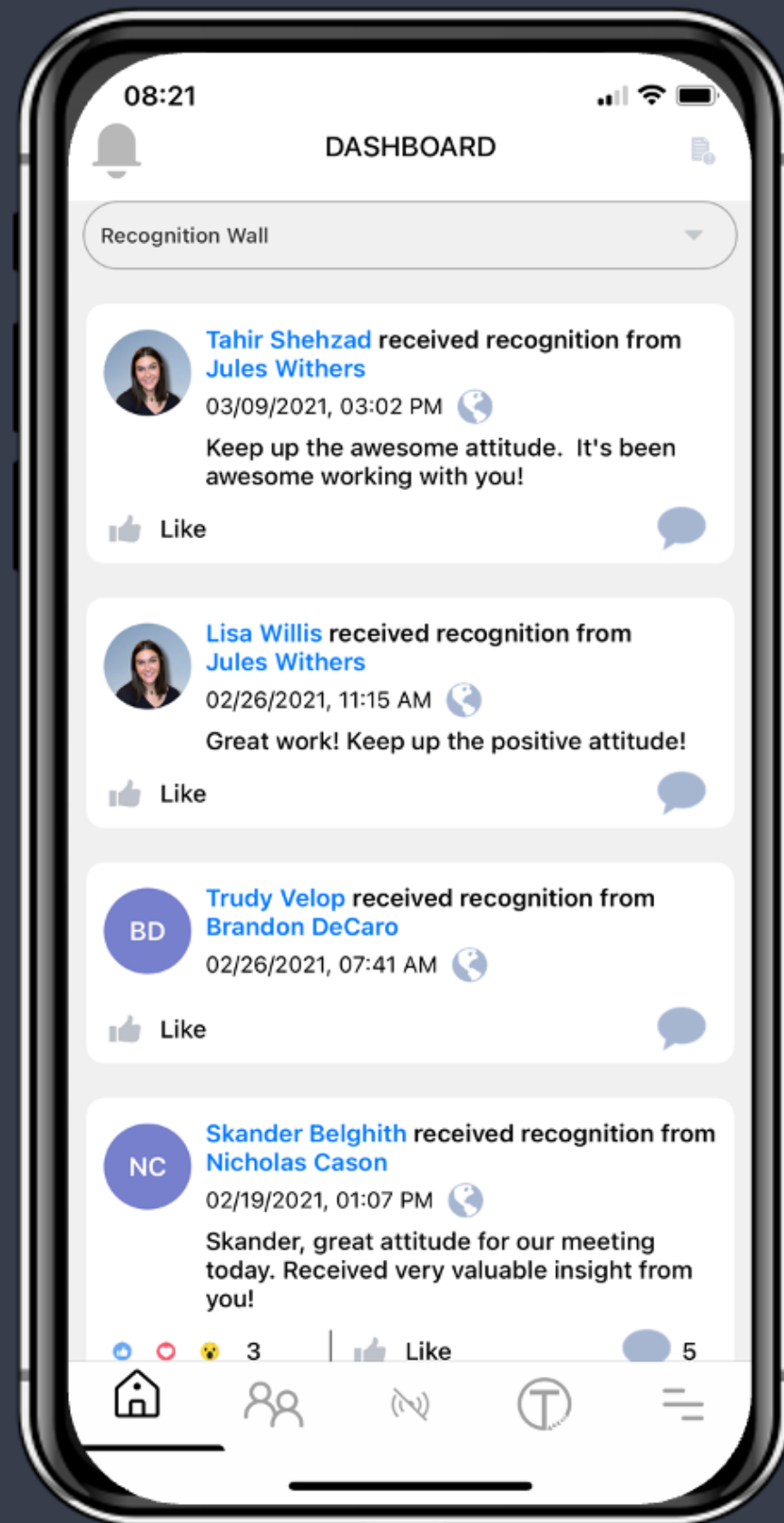
- Set performance and career goals using the Goal(s) classification
- Establish a time to follow-up on the goals and review progress made
- Share encouragement, support, and guidance



#2 Reinforce the right behaviors

- Job well done
- Great teamwork
- Positive attitude
- Effective communication
- Working efficiently with peers and superiors
- Arrived to work focused and prepared





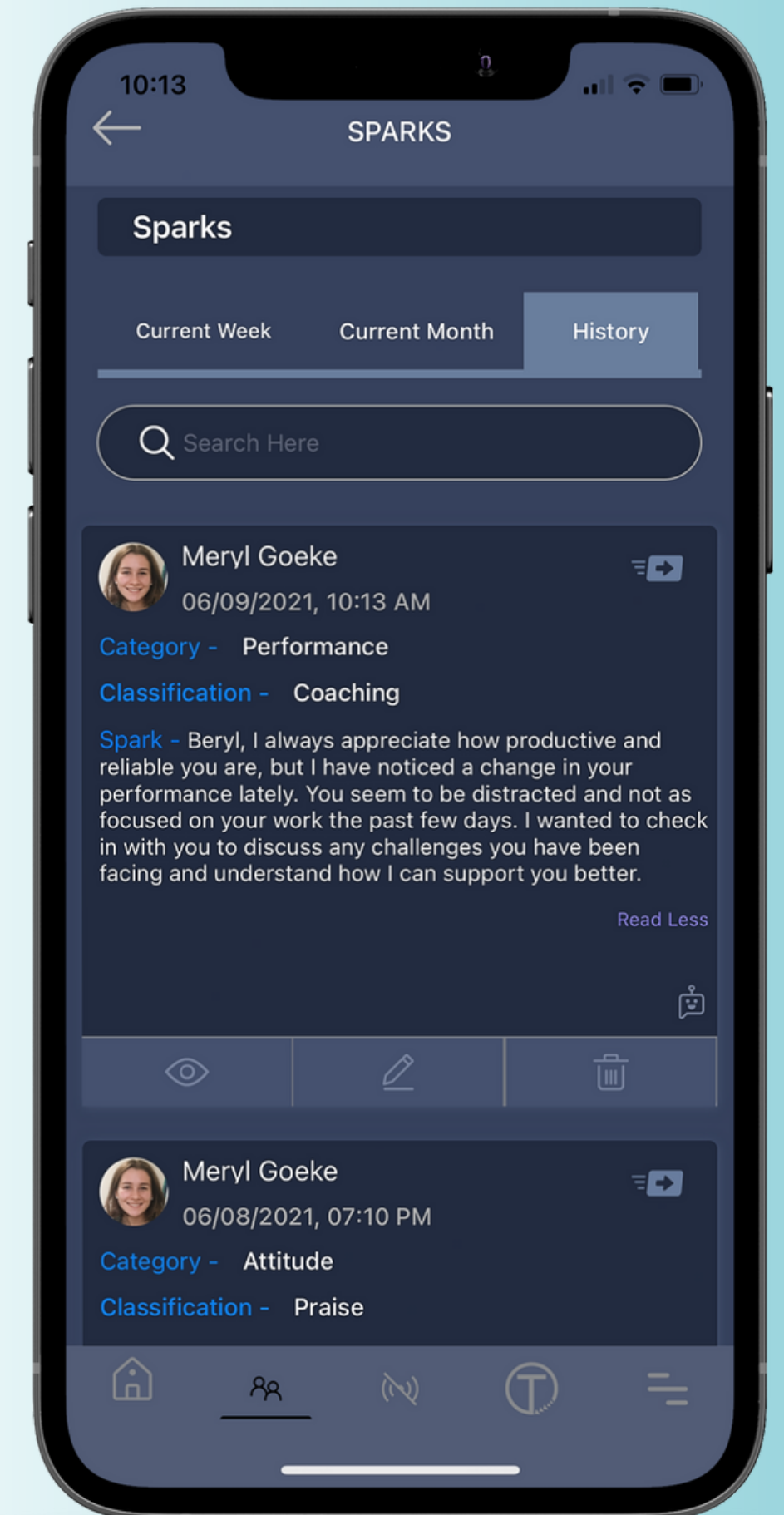
Recognition Wall



#3 Coaching moments

SITUATION, BEHAVIOR, IMPACT

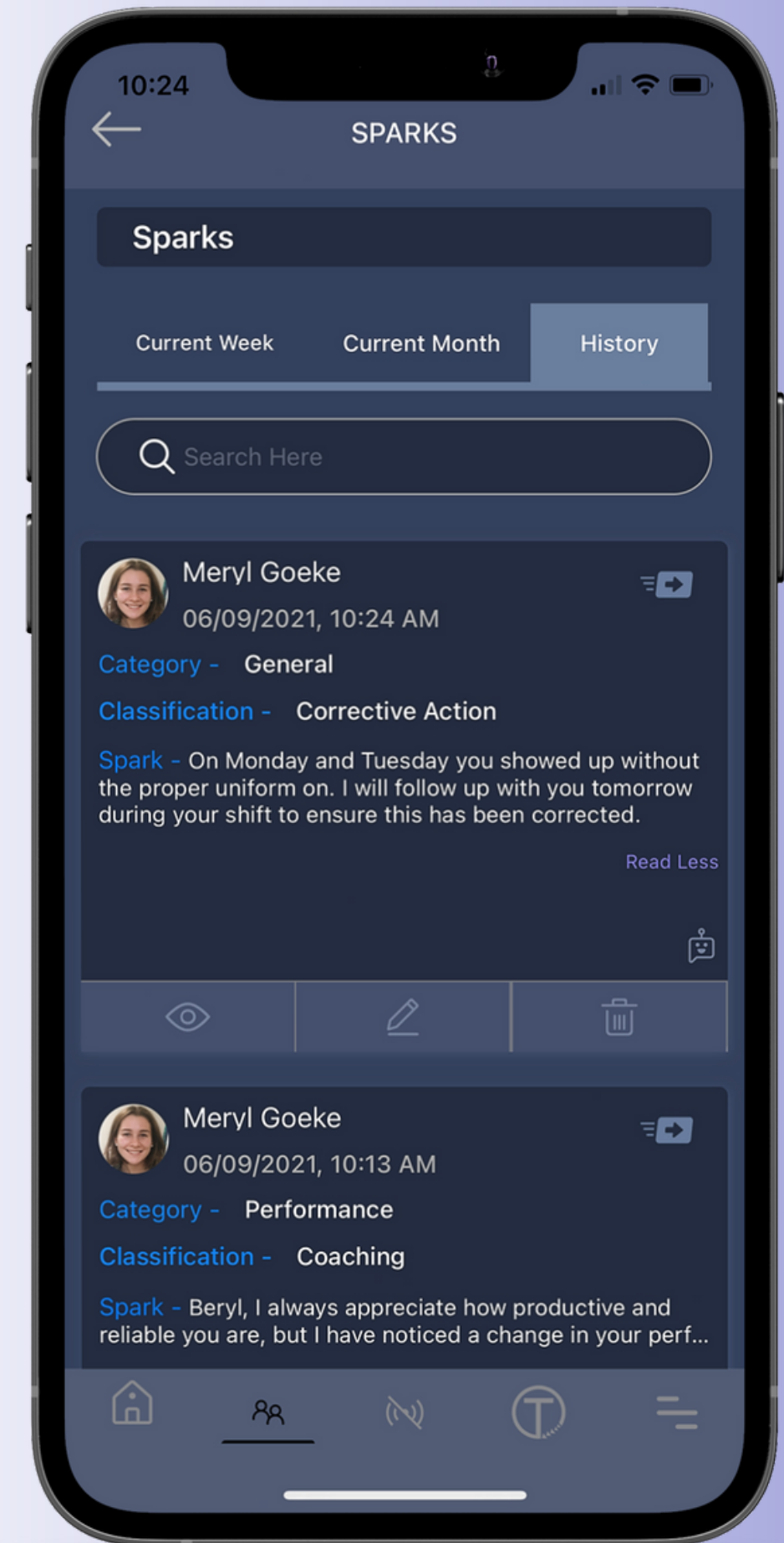
Drive performance forward with clear guidance. Use this as a learning opportunity.



#4 Documenting corrective actions

Be fair, objective and clear.

Once behavioral change is achieved, Spark again and say "Great job turning it around!"



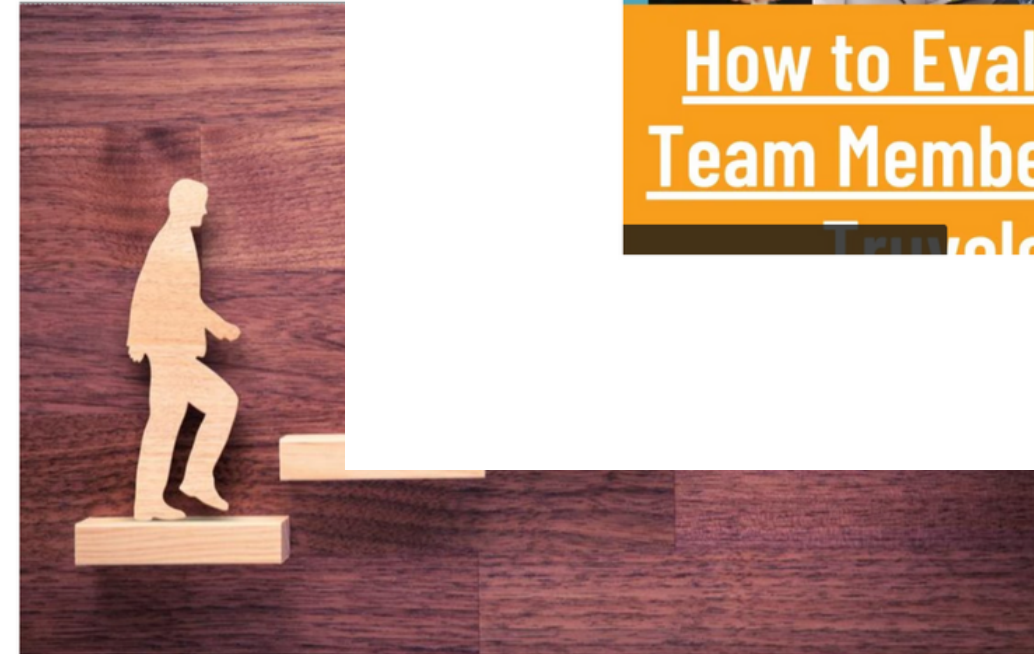
Don't forget to use the Knowledge Center!



WHY SET GOALS?

Before we even dive into the different types of goals, it's important to understand why we should be setting goals in the first place.

Goals have been shown to boost productivity and motivation, fostering positive employee wellbeing. According to an article by [Gallup](#), "Employees who strongly agree that their managers helped them set performance goals are 69% more engaged compared to employees who did not have managers help them."



Make Your Employee an A-Player

Approaches to Consider:

- Identify the Trigger category where the B Player has the most potential upside
- Is it Performance, Maintenance, or Attitude?
- Identify the area where they need to improve the most: Performance, Maintenance,
- Help the employee build an action plan with clear time guidelines and measurable milestones



Identify intrinsic motivators:

- Sense of accomplishment
- Personal pride
- Personal goals
- Feeling valued in the organization



Identify extrinsic motivators:

- Milestones and achievements
- Celebrate anniversaries, major achievements if that's something that resonates with the employee
- Position
- Income
- Recognition--this should be based on the employee's comfort level and desire for public recognition

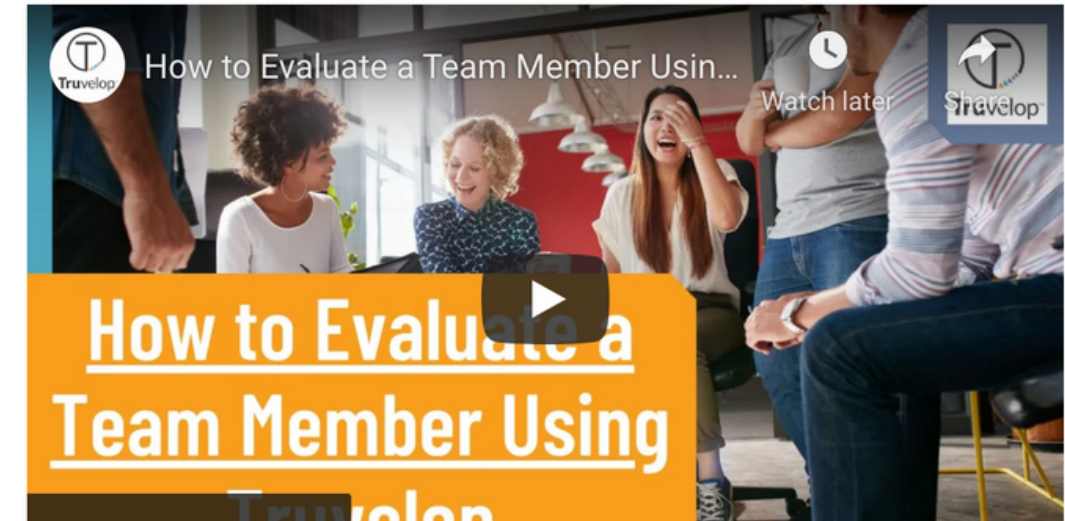


Recognize accomplishments in line with their motivational preferences.

- Do they like public recognition?
- Do they prefer a quiet, personal recognition?
- Do they thrive inside or outside of the spotlight?

How to Evaluate a Team Member with Truvelop

A step-by-step tutorial on how to evaluate a team member using Truvelop for laptop or desktop.



Getting Started: Download the Truvelop App

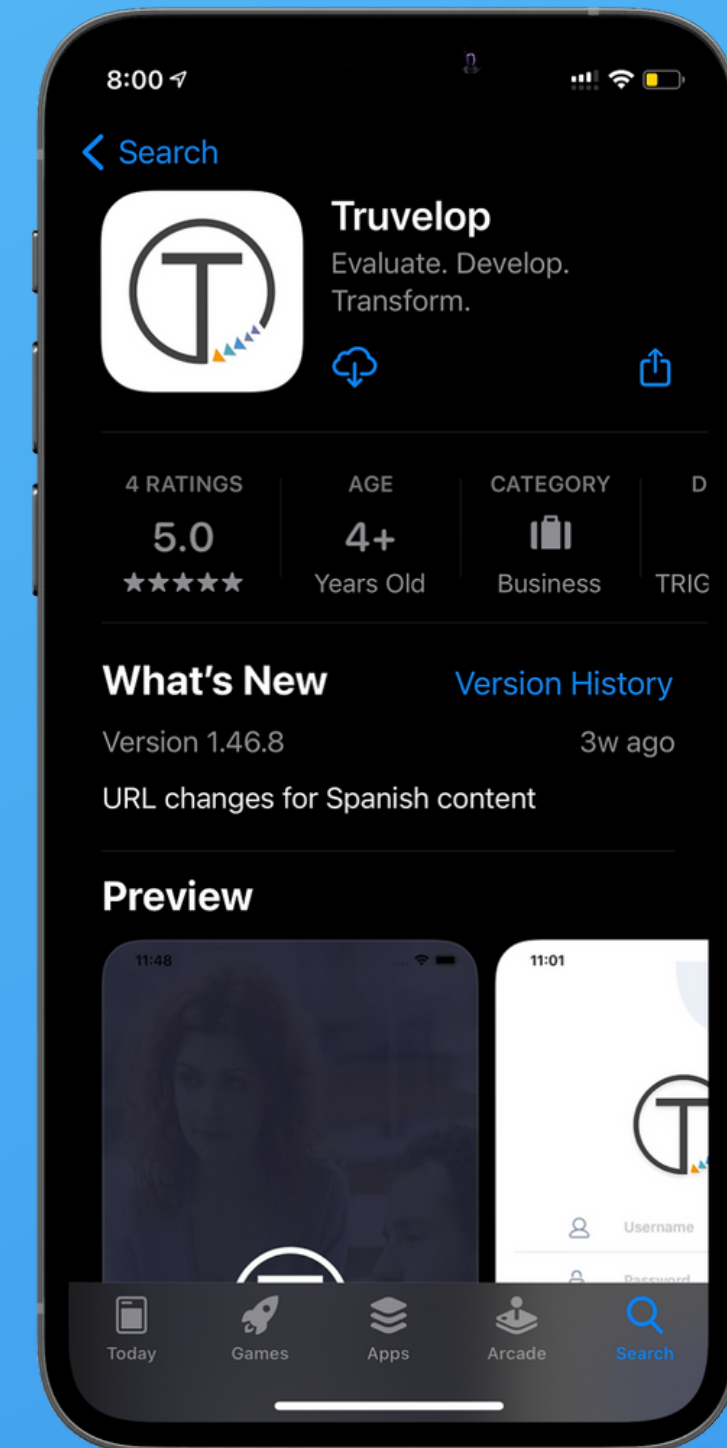
Step 1: Download the Truvelop App from the Apple App Store (iPhone) or Google Play (Android)

Step 2: Enter your User Name and Password. Your login credentials were emailed to you from noreply@truvelop.com. Check your spam folder if you don't see it in your inbox.

Step 3: Edit Your Profile to include a picture

Step 4: Enable your SMS Notifications

Step 5: You are all set! Start exploring the App.



Next Steps

1. Look for system invitation
2. Login to Truvelop
3. Familiarize yourself with the layout
4. Watch the 'How To' videos in the Knowledge Center
5. Evaluate quarterly
6. Spark away!

Questions/comments?
Contact Juliana Withers
juliana.withers@truvelop.com



LIVE DEMO