Continuous Performance Management

In This Series

- Continuous Performance Management: A Primer
- Three Shifts Driving the Move from Traditional to Continuous Performance Management
- The Possible Future of Performance Management
Continuous Performance Management: A Primer

Overview

While organizations of all sizes, locations, and industries have been evolving their performance management practices for years, relatively little has been written about the new “standards” for continuous performance management. We not only describe the ways in which these activities are fundamentally different from those used in the past, but also share the benefits expected from continuous performance management and some specific examples of the positive impact this approach has had at some companies.

This article explains what continuous performance management is and how it differs from more traditional performance approaches. It also sheds light on what the elements and processes of continuous performance management are.

In This Article

- Definition of continuous performance management
- Hallmarks of this performance management approach
- Benefits of this approach
- Real-world examples from companies

What Is Continuous Performance Management?

Interestingly, though many people use the term “continuous performance management,” there is a wide variety in the actual definition of the term as well as the practices it encompasses. We provide our definition and an overview of the activities we see as increasingly “standard.” We also share the benefits expected from continuous performance management and some examples of the positive impact this approach has had at some companies.

Overall, continuous performance management represents a philosophical shift to a belief that employees want to improve in addition to perform well, and that the organization’s primary role is to support them (versus assess them and hold them accountable).

Organizations may bring together these different hallmarks of continuous performance management in different ways. That said, based on our interviews over the years with hundreds of companies, we have summarized how we have seen many organizations actualize continuous performance management in Figure 1.

**Figure 1: Continuous Performance Management—An Overview of a Typical Approach***

*Please note that Figure 1 is an example only. Not all elements mentioned here are discussed in this article.*

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It should be noted that one element of performance management has been left out of the overview of a typical approach to continuous performance management—a formal rating mechanism. While many organizations have centered the majority of their performance management evolution discussions on whether to keep performance ratings, it is important to point out that this decision is just one of many that goes into the design of a continuous performance management approach.

Many organizations have moved to continuous performance management and retained ratings, which are still typically delivered at the end of the year. Other organizations have chosen to remove ratings, but retain a year-end conversation to create some closure on the year and to plan for the following year. Still others see the final year-end conversation as just another performance / development conversation, and add relatively little (if any) to that quarterly discussion.

*Hallmarks of Continuous Performance Management*

Overall, continuous performance management represents a philosophical shift to a belief that employees *want to improve* in addition to perform well, and that the organization’s primary role is to support them (versus assess them and hold them accountable). So what does this look like, practically speaking? In Figure 2, we outline the most common hallmarks of continuous performance management, which are explained in more detail in the following sections.
Dynamic Goals

Unlike goals that are set once per year, continuous performance management encourages managers and direct reports to frequently assess progress toward and continued relevance of goals. Due to this dynamic nature of goals, organizations are simultaneously reducing their historical reliance on cascading goals in favor of a more networked goal-alignment approach. The frequency of goal updates tends to vary but is typically at least on a quarterly basis.

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2 We use the term “goals” for simplicity. Some organizations use the terms “objectives,” “priorities,” “key results” or some other nomenclature.

Ongoing Check-in Conversations

Often driven by the goal conversations, frequent “check-in” conversations are a key feature of continuous performance management. During these conversations, managers and direct reports can discuss a range of topics—but they usually focus on the work itself, any immediate feedback on the work (from either the manager or colleagues / peers), and any development needs / desires. The frequency of these conversations varies from organization to organization, but tends to range from once per week to once per month.

In our discussions with organizations, we found that organizations vary in the expectations they set with regard to check-ins, such as the following.

- **Timing.** Some organizations choose to do these either more or less frequently than delineated in the graphic. Differences on timing may be driven by factors such as work complexity (e.g., how often the work changes or the number of stakeholders involved) as well as organizational culture.

- **Topics covered.** Organizations vary in the topics they expect managers and direct reports to cover in the one-on-ones. For example, we see variation in the extent to which those meetings focus on work or development (though we have observed a general trend toward discussing both work and development together in these conversations). Some organizations are prescriptive on what to cover when and some are a little more relaxed, just giving managers high-level guidance.

- **Meeting initiation.** Organizations also vary in terms of who initiates the meeting, whether it be the manager or the direct report. Some organizations recommend a calendar-based approach (e.g., regularly scheduled meetings), but if one of these has to be moved, there still needs to be someone responsible for the logistics of getting the meeting back on the calendar.

Periodic Performance / Development Conversations

In an effort to collect performance data more frequently, continuous performance management tends to include a slightly more formalized performance feedback mechanism at least once per quarter. This could be a specific meeting dedicated to discussing performance across the quarter, a process (usually technology-based) for capturing performance data, or something similar. In addition, these meetings often tend to focus on development needs for the coming quarter(s).

Ongoing Crowdsourced Feedback

One of the key aspects of continuous performance management is obtaining performance data from a wider variety of sources, including peers, colleagues, customers, and partners / suppliers. Continuous performance management is increasingly leveraging both constructive peer feedback (e.g., suggestions for how to improve) as well as peer recognition (peers / colleagues expressing appreciation for work done well). This feedback is delivered in real-time throughout the year, and is captured for discussion during check-ins or performance conversations.
Crowdsourced feedback is another area in which we commonly see variance in how organizations approach this practice. Some organizations choose to control crowdsourced feedback (both recognition and constructive feedback) in the following ways.

- **Existence.** Organizations may choose not to offer crowdsourced feedback due to concerns related to culture (e.g., level of competitiveness or degree to which it may be politicized) or time required to provide it (e.g., too many people being asked to provide feedback) or some other reason.

- **Frequency.** Organizations may choose to only have crowdsourced feedback available during certain times of year versus on a continuous basis.

- **Transparency.** Organizations may choose to have crowdsourced feedback made available only to the person about whom the feedback is related, while others require that information go to the manager (who then decides how to share it), while still others allow recognition to be immediately shared with employees directly or with the broader network (e.g., via an internal newsfeed) but have a different approach for constructive feedback.

- **Source of Feedback Request.** Organizations may choose to allow only the individual involved to request feedback, the manager to request feedback on that individual’s behalf, or to allow individuals within or outside the organization to volunteer feedback on individuals in the organization.

**More Frequent Data Collection**

In addition to collecting ongoing peer feedback, organizations are also capturing other sources of data on a continuous basis. For example, customers’ feedback on performance (e.g., assessed via customer surveys or through written direct feedback) or technology-captured data (e.g., information on time to issue resolution) are increasingly being integrated into performance discussions. With continuous performance management, this information can be made more available to direct reports, enabling the direct manager (and central organizational management) to no longer serve in the role of data gatekeeper, and instead act as a coach and interpreter of the data.

**Self-Reflection**

One of the more overlooked aspects of continuous performance management is the extent to which it empowers direct reports to be more responsible for their performance. A key part of doing this is increased self-reflection, whereby the direct report identifies what went well, what could be improved, and potential steps for making changes. This approach removes much of the responsibility for this from the manager and places it on the direct report. It is important, though, that direct reports have access to the data and insights they need to engage in this type of self-reflection. While good managers may have enabled this in the past, continuous performance management changes self-reflection from optional to increasingly necessary.
Benefits of Continuous Performance Management

We are often asked about the benefits of continuous performance management. Some of the most notable include:

- **Empowerment.** Managers, direct reports, and teams are more empowered to influence performance expectations and discussions throughout the year, instead of feeling as though they have to wait for the organization’s approval or an annual process.

- **Course Correction.** Discussions of goals / priorities, how to approach work, and assessment of progress happen more frequently, which allows for more rapid course correction. This can both keep direct reports more on track, but also allows managers to identify and respond to low performance more quickly.

- **Engagement.** Given more frequent conversations, managers and direct reports often develop stronger relationships—leading to greater attention to direct reports’ needs, and more trusting and open work environments. The result can also be an improvement in employee engagement. One study reported that 90 percent of companies which have redesigned performance management see direct improvements in engagement; 96 percent say the processes are simpler; and 83 percent say they see the quality of conversations between employees and managers going up.⁴

While these benefits may seem a bit theoretical, many organizations have achieved real benefits that they attribute to a move to a continuous performance management approach, as shown in Figure 3.

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### Figure 3: Company Examples of Realized Benefits from Continuous Performance

<table>
<thead>
<tr>
<th>IBM</th>
<th>Patagonia</th>
<th>Equinix</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engagement scores have increased double-digits</td>
<td>The use of quarterly goals with check-ins is associated with:</td>
<td>• Statistically significant increases across all 20 engagement items surveyed</td>
</tr>
<tr>
<td>Feedback throughout the organization has increased</td>
<td>• Increased clarity of expectations</td>
<td>• Increase in employee perceptions of engagement, communication, and alignment</td>
</tr>
<tr>
<td>Sentiment around the redesign is positive</td>
<td>• Increased quality of feedback from manager</td>
<td></td>
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<tr>
<td></td>
<td>• Increased value contributed, resulting in higher bonus awards</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>General Electric</th>
<th>Adobe</th>
<th>NY Life</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 70% of employees found discussions to be the same or better without ratings</td>
<td>• Voluntary turnover decreased by 30% after implementation of new approach</td>
<td>• Increase of 10 percentage points in perception of process fairness</td>
</tr>
<tr>
<td>• 80% of managers found that salary and bonus planning with differentiation was achievable without ratings</td>
<td>• Engagement increased 1.2%</td>
<td>• Increase of 3 percentage points in perception of process usefulness</td>
</tr>
<tr>
<td></td>
<td>• Net promoter scores increased 2.2%</td>
<td>• Increase of 2 percentage points in clarity of goals</td>
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</table>

An example of what continuous performance feedback looks like is provided in the following case in point on Patagonia.

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Case in Point: How Patagonia Takes a Continuous Approach to Performance Management

Founded in 1973, Patagonia is an American retailer of outdoor adventure clothing and equipment, employing more than 2,000 individuals. The company explicitly states three missions—to build the best products, to cause no unnecessary harm, and to inspire and implement solutions to environmental crises.

To better support these missions, Patagonia decided to update its performance management approach from a more traditional process to one that not only drives performance, but also fuels development in a continuous manner. Built to not only address organizational needs, but also to encourage performance and growth, performance management is now based on a holistic approach that involves goal-setting, one-on-one check-ins, feedback, and recognition (see Figure 4).

Patagonia created a platform in which employees set annual goals that are used to evaluate end-of-year performance. This allows employees and managers to discuss performance criteria and clearly lay out expectations for the individual employee.

Figure 4: Addressing Yearly Targets (performance) and Quarterly Goals (development)


To address development and encourage employees to push themselves—and potentially fail, Patagonia instituted quarterly stretch goals which are development-focused goals that encourage employees to think ambitiously about what they want to do in the next quarter. The company actively instructs employees to voluntarily set goals that they may not fully meet within the quarter—to instill the idea of using failure or obstacles as learning tools, to feed development in the next quarter.

Throughout the quarter, employees can seek feedback from anyone in the organization and provide feedback. Additionally, recognition has been layered into performance management, so that employees not only gain actionable insights in the form of feedback, but also network-driven, publicly displayed recognition.

At the end of every quarter, employees go through a reflection and feedback process for each stretch goal to identify what they want to celebrate and what they would do differently next time (see Figure 5).

**Figure 5: Patagonia’s End-of-Quarter Stretch Goals Reflection Process—Sample 1**


(cont’d on next page)
Case in Point: How Patagonia Takes a Continuous Approach to Performance Management (cont’d)

In addition, employees are asked to “identify your biggest insights about yourself, your team, and/or your organization?” and “Based on these insights, are there any new behaviors or habits you want to build or lean on more next quarter?” (see Figure 6.)

**Figure 6: Patagonia’s End-of-Quarter Stretch Goals Reflection Process—Sample 2**

![Figure 6: Patagonia’s End-of-Quarter Stretch Goals Reflection Process—Sample 2](Source: Patagonia, 2017.)

Finally, employees identify work or goals that should be carried forward into the next quarter, or new goals or work that should be done in the next quarter. Employees use these forms to drive one-on-one check-ins with their managers—to review previous feedback, recognition, and one-on-one discussion notes. At the end of the year, an employee has had multiple check-ins that support development and ultimately drive performance (see Figure 7).
To date, Patagonia has evaluated this goal-setting approach to performance management and has found that individuals who create quarterly stretch goals are more likely to outperform those who do not, and they are more likely to hit their static, annual goals.
Conclusion

Changes in the expectations held by employees, the marketplaces in which organizations compete, technology, demographics, and workforce composition have all pushed organizations to reorganize how work is accomplished. Traditional forms of performance management no longer fully serve the needs of organizations that have moved away from individual-focused jobs to team-based networks. While organizations have recognized the shift to a more agile and continuous form of performance management, many still struggle to understand how the components have changed. While there is no “one best way” in continuous performance management, there are hallmarks of the approach that can be incorporated in a variety of ways. In support of this, organizations with different ways of addressing continuous performance management are reaping the benefits of such an approach.

Key Takeaways

- Continuous performance management represents a philosophical shift to a belief that employees want to improve in addition to perform well, and that the organization’s primary role is to support them.

- While hallmark components of continuous performance management exist, they can be incorporated into an organization’s approach in a wide variety of ways.

- Numerous benefits can be realized from continuous performance management; organizations with different ways of addressing continuous performance management are benefitting from such an approach.
Three Shifts Driving the Move from Traditional to Continuous Performance Management

Overview

It may seem easy to summarize the changes embodied by continuous performance management as simply, “Make sure people talk to each other more.” While there is some truth in this statement, it obscures three major shifts that are also occurring in the areas of data and information accessibility, organizational control of work and feedback, and the connection between performance management and culture.

This article provides our perspective on three major shifts in continuous performance management. In understanding these fundamental shifts, leaders should be able to design and refine their continuous performance management activities, and determine the extent to which they want to make changes.

In This Article

- Review the macrolevel drivers of change that necessitated continuous performance management
- Three critical shifts underlying the continued changes in performance management
- Examples of how organizations are responding to and incorporating these shifts into their continuous performance management approaches
How We Got Here: Macrolevel Changes

The world of work has changed substantially from the time when the traditional performance management process was designed. Some of the most notable changes include:

- **Employee / employer social contract.** Attracting and retaining top talent now requires employers to provide employees with rapid career growth, a compelling and flexible workplace, and a sense of mission and purpose at work.

- **Acceleration of the marketplace.** The introduction of disruptive business innovations and globalization have increased the need for agile and flexible teams with individual and team-based objectives and goals that can be revised throughout the year.

- **Expansion of technology.** Technology’s reach has extended deep into organization talent strategies to change everything from attracting talent to monitoring performance.

- **Workforce demographics.** With at least four generations in the workforce, employees have altered expectations of work-life fit; further, the global nature of business has changed how, when, and where employees want to work.

- **Workforce composition.** As an increasing number of individuals are engaging in “gig” work, versus full-time employment, organizations need to determine how best to manage and evaluate these workers who are meaningfully contributing to projects, but are not on their balance sheet.

Impact on Work

The result of these changes is that organizations are evolving the way work is being done. For example, organizations are increasingly examining how they define work—breaking up that work into discrete tasks and processes, determining appropriate resource needs and assigning them (including an assessment of the need for automation, cognitive technology, or contingent labor), setting expectations, monitoring and capturing data, analyzing that information, and then deciding where change is needed.

Impact on the Workforce

Organizations are also analyzing how they are managing people to do that work. As shown in Figure 1, organizations are increasingly moving away from the conventional hierarchical structure to a model designed around networks of teams. Indeed, only

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14 percent of executives believe that the traditional organizational model—with hierarchical job levels based on expertise in a specific area—makes their organization highly effective. Instead, leading companies are pushing toward a more flexible, team-centric model. This enables organizations to more effectively meet the changing needs of customers and the broader marketplace. At the same time, the team-centric model can provide workers with a more compelling employee experience, in the form of a broader set of career experiences, more immediate impact on customers, and more flexible work.

**Figure 1: Workforces Increasingly Operate as Networks of Teams Instead of Hierarchies**

- Organizational hierarchy dictates teams
- Siloed values and culture
- Goals and projects based on hierarchy
- Information controlled by top and disseminated downward
- People rewarded for their positions
- Teams of individuals, with individuals on multiple teams
- Shared values and culture
- Transparent goals and projects
- Free flow of information and feedback
- People rewarded for their skills and abilities, not positions

This change in the nature of work and how it is done needs to be underscored as it has significant and important implications for every aspect of talent management, including performance management. While the network of teams approach may not be the reality for all workers everywhere yet, it is the general trend we see across organizations of various sizes, locations, and industries.

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6 Ibid. “The last decade and a half has witnessed a remarkable transformation of organizational structures worldwide. Although there are economic, strategic, and technological imperatives driving this transformation, one of its more compelling aspects has been an ongoing shift from work organized around individual jobs to team-based work structures. Increasing global competition, consolidation, and innovation create pressures that are influencing the emergence of teams as basic building block of organizations. These pressures drive a need for diverse skills, expertise, and experience. They necessitate more rapid, flexible, and adaptive responses. Teams enable these characteristics.”
Impact on Performance Management

As organizations face intense pressures to respond to customer needs and the market more quickly, they analyze internal processes for efficiency opportunities. Given the limitations of historical performance management, it is no surprise that it was a prime opportunity for change, if only for reasons of process efficiency if nothing else. When you add in all the macrolevel changes occurring as previously noted, and specifically the reduction in hierarchy and the increased transparency of information and feedback, clearly it was time for something new—and the something new that many organizations are settling on is being called “continuous performance management.”

Three Critical Shifts: Data, Control, and Culture

In the previous section, we outlined the macrolevel factors that are impacting the nature of work and how it gets done—thus, indirectly necessitating a move from traditional performance management toward a continuous approach to performance management. In Figure 2, we outline the three major shifts that are enabling the move to continuous performance management. We expect that, with time, these shifts will likely only continue to drive even greater changes in performance management activities. In the following sections, we provide more details on each of these shifts.

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**KEY POINT**

We have identified three major shifts—in data, control, and culture—that underlie the change to continuous performance management and are useful to understanding where performance management may be heading in the future.

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7 “Historical performance management” was an annual or semiannual, backward-looking, and frequently secretive process that overemphasized financial rewards and punishments, often at the expense of driving future performance. Further, that process was viewed as being of little to no value by direct reports and managers, though it required significant time investment from organizations. Unfortunately, the result was too often feedback and a rating that was potentially fraught with biases, but still used to drive other critical talent decisions (e.g., promotion, succession, leadership development, or learning access).


9 We have profiled organizations that have conducted different types of analyses, but organizations commonly report that the annual process requires managers to make a time investment of approximately eight hours per direct report; this number is often used to support the case for change. For an example, How Adobe Reengineered for Performance Agility: Part 1 of the Abolishing Performance Scores Webinar Series, Bersin, Deloitte Consulting LLP / Stacia Sherman Garr, 2013.


12 Ibid. Seventy-nine percent of executives rate redesigning performance management a high priority, up from 71 percent three years ago, with 38 percent calling the problem “very important.”


14 Ibid. This emphasis on performance management was consistent across all regions in our global survey, with it being rated as “important” by 86 percent of executives in Asia, Latin and South America, and the Middle East, and approximately 73 percent of executives in Western Europe, Central and Eastern Europe, and Nordic countries.
Three Shifts Driving the Move from Traditional to Continuous Performance Management

**Figure 2: Continuous Performance Management Represents a Shift in Three Areas**

<table>
<thead>
<tr>
<th>Shift 1: Data</th>
<th>Shift 2: Control</th>
<th>Shift 3: Culture</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Higher frequency</td>
<td></td>
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<td>• More sources</td>
<td></td>
<td></td>
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<tr>
<td>• New types</td>
<td></td>
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<tr>
<td>• Higher quality</td>
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<td>• Greater access</td>
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<tr>
<td>• Increased transparency</td>
<td>• Decrease in centralized organizational control</td>
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<tr>
<td></td>
<td>• Change in manager’s role from “command and control” to coach</td>
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<td></td>
<td>• Greater autonomy for managers and individual direct reports</td>
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<td></td>
<td>• Increased responsibilities for individuals and team</td>
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<tr>
<td></td>
<td>• Increase in embeddedness of performance management activities into daily work</td>
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<td></td>
<td>• Increase in extent to which performance management activities reinforce or contradict organizational culture</td>
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**Shift 1: Data**

One of the most fundamental shifts underscoring the move to continuous performance management is the increased focus on collecting more and new data, more frequently, from a wider variety of sources, and making it more accessible to a broader audience.

**KEY POINT**

One of the most fundamental shifts is the increased focus on collecting more and new data, more frequently, from a wider variety of sources, and making it more accessible to a broader audience. In addition, in many organizations, the collection of this data is paired with broader access to the data, in the form of tools and dashboards, as well as greater transparency into that data throughout the organization. These changes are described in more detail in Figure 3.
Three Shifts Driving the Move from Traditional to Continuous Performance Management

Case in Point: Equinix Uses Multiple Sources of Data for Its Performance Management Approach

An example of this shift is currently taking place at Equinix, a data center operator. The company recently redesigned its performance management approach to comprise multiple sources of data including quarterly conversations between managers and employees to align on goals and performance; pulse surveys to track engagement on key variables of organizational interest; and an annual six-item assessment based on an employee’s impact, value, and growth and potential. Taken together, these various data points provide a more holistic picture of the workforce and the individual.

In addition, Equinix sought not just to gather information on employees, but to put that data back in the hands of managers. Recognizing that the relationship with their managers is one way that the talent experience becomes tangible for employees, Equinix provides managers with pulse survey results, which they are expected to act upon. More specifically, they are held accountable for picking one item for improvement with their team, determining at least two ways to address that item, and then communicating progress toward improvement at three time periods.

Figure 3: Shift 1—The Role of Data in Performance Management Is Changing

<table>
<thead>
<tr>
<th>Changes to Performance Management Data</th>
<th>Frequency</th>
<th>Sources</th>
<th>Types</th>
<th>Access</th>
<th>Quality</th>
<th>Transparency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collected and disseminated more frequently, ranging from hourly to quarterly, depending on data type and source</td>
<td>Broader range of sources, including customers / clients, peers, direct reports, and technology-based reports and artificial intelligence</td>
<td>Broader range of types of data, ranging from qualitative opinions to data-driven metrics</td>
<td>Improved access to data via updated or real-time dashboards that are accessible and responsive on any type of device</td>
<td>Increased focus on gaining data insights from higher-quality sources, be they individuals who are in a position to have meaningful commentary on performance to data and dashboards that have higher levels of accuracy</td>
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</tbody>
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Interestingly, for organizations that have decided to remove performance ratings, this shift may not be obvious. In fact, in those organizations, the removal of ratings may make it look as though the organization is actually moving in the opposite direction—as the performance rating is a data point that is no longer available. However, one of the key changes (as shown in Figure 3) is in data quality—and research\(^{16, 17}\) indicates that performance ratings may not always be high-quality data points.

Therefore, the shift in these organizations is less about a decreased focus on data, generally speaking—and instead about removing a low-quality data source and replacing it with higher-quality data sources. These other data sources may be the frequent check-in conversations, peer feedback, employee engagement scores, or other information sources. The fundamental difference between those sources, though, and the performance rating, is that they are not always packaged as neatly or made as readily available to senior management or HR as the performance rating. So the information is more robust for managers and direct reports, but it may not always be as accessible to senior leaders or HR.

This leads us to the second shift, which focuses on for whom performance management activities and outcomes are designed and the relative degrees of control at different levels in the organization.

### Shift 2: Control

The second shift underlying the changes in continuous performance management has to do with for whom the performance management process was designed. In the historical performance management process (left side of Figure 4), performance management was primarily designed to provide information necessary to make transactional (e.g., compensation) decisions about all employees and critical talent decisions on the two ends of the performance spectrum (e.g., who to exit from the organization and who to promote / develop).

Over time, the system was minimally adjusted to provide more information for managers and direct reports (e.g., goal-cascading for clarity on work priorities, midyear check-ins for progress updates), but those modifications did relatively little to increase the value to managers and direct reports (as indicated by the current level of backlash against the historical approach). The system was still designed to provide information and control (e.g., in the form of cascaded goals and forced performance distributions) to senior leaders and HR, not necessarily to drive stronger performance.

Continuous performance management is different—it is designed to provide more process ownership, control, and information transparency to managers, individuals, and teams (see right side of Figure 4). This enables those populations to have conversations about goals, performance, and appropriate adjustments at the local level, without a fear of being called out as “wrong” (as could happen when goals are cascaded in lock-step from the top, or when performance ratings are “adjusted” to meet a forced distribution). The intention of continuous performance management

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\(^{17}\) “Explaining the weak relationship between job performance and ratings of job performance,” Industrial and Organizational Psychology / Kevin R. Murphy, 2008.
is to enable individuals who are actually doing the work to remain in concert about what work needs to be done, how to do it best, and when to make adjustments. That said, information is still typically shared with HR and senior leaders that can drive the transactional and talent-related decisions highlighted in the historical model. However, that information is an outcome of performance activities—not the primary reason for a formal performance management process.

**Figure 4: Historical Performance Management versus Continuous Performance Management**

*Note: The level of process ownership, control, and information transparency is greater for populations higher in each graphic, while the extent to which the process is designed to benefit, provide insight to, and guide declines for those lower in each graphic.

To put some more detail on this shift, in Figure 5 we outline how the control over processes, performance ownership, transparency, and feedback have changed with the move to continuous performance management for different populations.
Three Shifts Driving the Move from Traditional to Continuous Performance Management

Case in Point: How One Company Enables Employees to Take Control of Performance and Development

A financial services company redesigned performance management to enable employees to take control of the reins when it comes to their performance and development. More specifically, recognizing the overwhelmingly negative sentiment around the company’s previous approach, the organization took a drastic step—it stopped performance management altogether. Instead, the company spent time listening to and understanding employees’ needs, which performance management was intended to meet. Company leaders found that employees wanted feedback and development and, more importantly, they wanted to have the ability to be a part of the process, as well as craft the how and what for themselves in a safe and risk-free space.

<table>
<thead>
<tr>
<th>HR</th>
<th>Senior Leaders</th>
<th>Managers</th>
<th>Individuals</th>
<th>Teams</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change or decrease in historical approach to performance documentation</td>
<td>Decrease in perceived control over goals resulting from reduction of cascaded goals</td>
<td>Increase in managers’ latitude to give continuous feedback based on their own and others’ perspectives</td>
<td>Increase in responsibility for performance, ranging from setting goals to appropriately accepting and responding to feedback, to bringing in manager / coach as appropriate to help respond to feedback</td>
<td>Increase in team members’ responsibilities to identify teams’ goals, connect their own to them, and stay in sync with them throughout the year</td>
</tr>
<tr>
<td>Decrease in formalization of performance review process</td>
<td>Decrease in control over feedback provided to employees (in the form of ratings)</td>
<td>Increase in expectation of managers’ skills / capabilities as coaches; decrease in managers’ command-and-control role</td>
<td>Increase in responsibility for maintaining alignment throughout the year with overall company goals, team goals, and colleagues’ goals</td>
<td>Increase in necessity to identify team members, team objectives, and individual roles and responsibilities</td>
</tr>
<tr>
<td>Decrease in extent to which HR has insight into where managers / employees are in the process (i.e., number of 1:1s, appraisal completion rates)</td>
<td>Change in types of performance management data (e.g., decrease in data on evaluation completion rates, but potentially increases in other types / frequencies of data)</td>
<td>Decrease in managers’ responsibilities as ultimate accountability driver, and increase in responsibility as coach and leader</td>
<td>Increase in responsibility to give feedback (positive and constructive) that helps colleagues / teammates improve their performance</td>
<td>Increase in importance of team work to individuals’ performance evaluations</td>
</tr>
</tbody>
</table>

In response, the organization redesigned performance management with the following two guiding principles.

1. **Strive to make participation voluntary.** The company wanted to avoid getting caught up in an HR-driven process in which rules and regulations are mandated to keep employees inline.

2. **Create an environment that fosters a sense of safety among employees.** Wanting to nurture trust throughout the organization, employees would be given control over their own careers and development.

Today, the company uses a tool, built in-house, that consists of three modules—all of which are initiated and driven by employees. They include:

- **A feedback module.** Allows employees to initiate feedback from across the organization, decide whether to share that feedback (and with whom), and determine how feedback will be solicited
- **A coaching module.** Enables employees to choose their own coaches, initiate check-ins, and determine whether to share coaching information—and if so, with whom it will be shared
- **An alignment module.** Allows employees to align performance and development with their manager or their manager’s manager

**Shift 3: Culture**

The final shift underlying the move to continuous performance management is the change from performance management as a process that occurs outside of the flow of work to performance activities as a part of how work gets done. With this transformation, performance management activities become even more of a representation than before of the organization’s values, and the expectations of how managers, direct reports, and teams should interact on a daily basis. As such, those performance activities increasingly influence and become a part of the organization’s culture.

Let us explore this in a bit more detail. In Figure 6, we describe the difference between how employees’ performance experiences have been described historically (and thus what historical performance management was designed for) versus how employees actually experience their work and performance.

On the left side, the assumption is that an employee is a single link in a vertical chain; those higher in the hierarchy set goals, which are then cascaded down to managers, who would then likely cascade a subset of those goals down to their own direct reports. The manager would then be the conduit for feedback for the direct report throughout the year. At the end of the year, managers would assess employees, based on their own observations and, potentially, that of their peers or the employee’s direct reports. This is a very siloed, vertical process, with goals coming down the organizational hierarchy, work being done, work being assessed, and information going back up the hierarchy.
Unfortunately, this is not how employees tend to actually experience their work world. Instead, it is a much more collective experience, with a variety of influences, as outlined in the image on the right of Figure 6. The employee is at the center of her experience, with her manager having an impact on her performance (especially as it relates to setting and adjusting goals). In many instances, her network [e.g., peers, team(s)—including direct reports, colleagues, and senior leadership] has an even larger impact on her ability to perform. Beyond the network, the organizational context also impacts performance.

Continuous performance management is designed much more to match the right side of the graphic. Managers and direct reports set and update goals with both the manager’s own goals, but also the broader organization’s goals, in mind. Employees operate within their networks to get work done, and those networks provide recognition and feedback, giving the networks an opportunity to influence employees’ performance. The manager, who also provides perspective, moves from the single assessor of performance to a coach of the employee, helping that worker to interpret and respond to the feedback.

As a result of these changes, performance activities are a part of how employees interact with each other on a daily basis. Since those interactions (and the expected behaviors in the organization, generally speaking) are daily manifestations of the organizational culture, performance activities are increasingly an expression of organizational culture. We outline this relationship in Figure 7.
Three Shifts Driving the Move from Traditional to Continuous Performance Management

This coming together of performance management and culture highlights the increasing importance of an organization having a clear performance management strategy. While it may have been possible for organizations to have historical performance management without a clear strategy, this is not the case with continuous performance management. Given what continuous performance management activities communicate about the organization’s culture, it is critical to understand:

1. The purpose of performance management (e.g., what the organization is hoping employees and the overall organization itself will receive as a result of engaging in performance management activities)
2. The organization’s performance management philosophy (the organization’s belief about how people should be managed to achieve the performance that the organization needs to succeed)
3. How these align to the organization’s business strategy, goals, culture, and talent management strategy

The second takeaway from this growing connection between culture and performance management is the latter’s impact on employee experience and employee engagement. If we know that performance management activities are increasingly an embodiment of “how things are done around here” (our definition of culture), then there is likely to be a connection between those activities and employees’ personal experiences of their work and their own level of engagement. For this reason, we are starting to see organizations also measure employee engagement and experience in the context of performance management.

An example of how one organization has created this alignment between performance management activities, employee experience, and organizational culture comes from IBM, as detailed in the following case in point.

**Figure 7: Shift 3—Culture and Performance Management Influence Each Other**

Since continuous performance management means ongoing conversations about goals and work-related activities, real-time data and dashboards, and the ongoing connection between individuals and their network to their work, performance management shifts from an event-driven process to how work gets done every day, and thus influences culture.

Employees’ experiences in getting work done—in all of the different interactions with the organization—are their personal experiences of their organization’s culture. That culture also influences how work- and performance-related conversations and activities occur.


**ANALYSIS**

When designing performance management activities, leaders need to understand the purpose and philosophy of their organization’s performance management, and how these align to the organization’s business strategy, goals, culture, and talent management strategy.
Case in Point: IBM Leverages Design Thinking

Due to shifting values in its workforce, in particular the expectation that employee voices would be heard and acted upon, IBM leveraged design thinking when redesigning its performance management. This not only fostered a relationship with employees, but also created an approach to performance management that was culturally appropriate.

More specifically, IBM took a design thinking approach and chose to first listen to employees and then be as transparent as possible during the redesign process. Not wanting performance management to be something developed in isolation and then pushed upon employees, the company:

- Identified pain points in a series of design thinking workshops, bringing together people throughout the organization and across different levels
- Opened up a cocreation dialogue, and invited the entire workforce to participate to identify themes, ask tough questions, and challenge employees to engage in difficult conversations around various performance management practices
- Played back and showcased prototypes of the new design to employees in order to continually iterate performance management based on employee feedback

As a result, engagement scores have increased by double-digits; feedback throughout the organization has increased; and IBM has been able to redesign a performance management approach that is aligned to its culture, encouraging ongoing feedback and empowering employees to be in control of their goals. In addition, the process of redesigning performance management using design thinking ensured that the new approach was culturally relevant.

In support of the process used, sentiment around the redesign is positive. This rapid and successful redesign is attributed, in part, to the desire of IBM to listen first and then design a solution that is aligned to the culture. Keeping with the culture, the performance management team is continuing to listen to the workforce to iterate on the design and foster a culture of continuous development.
Reflection

While the prevailing theme of increasing the frequency and quality of conversations makes continuous performance management seem simple, fundamental changes in data, culture, and control are underlying many of the more nuanced shifts. The impact of these changes extends beyond simply having more conversations. Therefore, as data, control, and culture continue to make inroads and advancements into modern approaches, organizations should continue to evolve their performance management approaches.

Key Takeaways

- Three key shifts are at the heart of the changes for a more continuous performance management approach—data, control, and culture.
- These shifts have much more nuanced consequences for performance management, far beyond just encouraging employees to engage in conversations that are more frequent.
- As modern performance management continues to evolve, organizations should continue to understand how shifts in these three key areas may impact or disrupt their current approach.
The Possible Future of Performance Management

Overview

While it is common knowledge that organizations have been evolving their performance management practices to a more continuous approach, relatively little has been written about what may be coming next in the world of performance management. While organizations are still struggling to understand the new “standards” of modern performance management, it is crucial to understand how it may further evolve, so that organizations can keep these possibilities in mind as they begin to address continuous performance management. Designing a performance management approach for the here and now, without regard for potential future-states, may meet organizational needs for a time, but may also result in an organization’s decreased ability to respond to future needs in efficient and effective ways.

This article takes a look at where performance management is now and where it is heading. It also discusses the factors influencing this evolution and offers key questions for consideration.

In This Article

- A look at the continuum of performance management and its evolution
- A look at the possible future of performance management and what factors may influence the evolving state of performance management
- Key questions leaders can consider when determining their performance management philosophy

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Where Is PM Going Next?

“The future is already here—it’s just not evenly distributed.”
—William Gibson

As we look holistically at performance management across the last 7 to 10 years (see Figure 1), we can see a shift from a centralized, high-control model of performance management (exemplified by the hierarchy-driven assessment and comparison of people to each other) to a more distributed, low-control model of performance management (as demonstrated by the shift to continuous performance management, and an increased focus on coaching and developing individuals).

Looking into the future, we anticipate the three shifts in data, control, and culture to continue the push along this continuum. For organizations at the furthest end of the spectrum (Figure 1, light green), they may create an environment in which data and information are more freely available to enable individuals to:

1. Self-align to organizational, team, and peer goals on an ongoing basis
2. Instinctively access and reference data on a continuous basis to understand and then adjust their performance
3. Use coaches, peers, and others in their network to interpret their data and information, map out alternative work approaches, and drive accountability

Figure 1: Performance Management Evolution


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4 We are defining “data” as both qualitative (e.g., crowdsourced or coach-provided feedback) and quantitative (e.g., employee engagement scores, other data captured via technology tools).
While most organizations are still pretty far on the left side of the spectrum (Figure 1, dark green), we see some organizations that have already moved pretty far to the right of the spectrum. (An example of this is the case in point, “How Raizlabs Creates a Data-Rich, Team-Enabled Performance Approach.”) In addition, many software providers are beginning to offer features that can enable organizations to move further to the right, such as:

- The ability to search for and align to colleagues’ (at any level in the organization) goals on a continuous basis throughout the year
- Increased integration with workflow systems (e.g., Slack, Jira, or email) that can provide more real-time project data / milestones, as well as information about employees’ networks (via email or calendar functions)
- Greater prominence of colleague recognition and the automatic capture of that recognition, as well as constructive feedback into a single location to be discussed during performance conversations
- More flexible, user-interface-friendly dashboards and data analysis capabilities made more broadly available throughout the organization

Clearly, some aspects of the future of performance management are already here. Yet, every organization should embrace this brave new future in a different way. How far organizations may choose to move along this spectrum will likely depend on at least two factors:

1. Leaders’ assumptions about work, managers, and individuals
2. Leaders’ need for centralized control over data, information, processes, etc.

Let us start by exploring Figure 2, which provides a high level overview of the processes at each end of the spectrum. The centralized, high-control model (on the left) is much more akin to the historical performance management model. This model relies on several assumptions:

- The manager / organization has the greatest knowledge of what direction employees should go in and how they will respond to stimuli designed to improve performance
- The primary stimuli that determine employee activities / behaviors / performance results from the manager and employee’s actions / relationship
- Employees’ individual activities / behaviors determine performance outcomes, with relatively little impact resulting from team or the network

At the other end of the spectrum, we see the distributed, low-control model, which also relies on numerous assumptions (that may or may not be true in different organizations):

- Employees want to take initiative and own their performance
- Coaches can gain an adequate skillset to guide employees (so those who were managers move to a different skillset of actually being coaches)
- Clear accountability can be created for performance outcomes outside of the traditional manager / direct report relationship
- Relevant individuals (from individuals’ networks) can be identified to give feedback / provide accountability and that feedback / accountability should be mostly even-handed

**KEY POINT**

How far an organization chooses to move along the spectrum from high control to low control will likely depend on at least two factors—leaders’ assumptions about work, managers, and individuals; and, leaders’ need for centralized control of data, information, processes, etc.
The Possible Future of Performance Management

- Organizational culture is adequately trusting that colleagues’ feedback is seen as useful and without undue political intent

How far an organization should move along the spectrum should at least partially depend on the extent to which its leaders embrace the assumptions at either end of the spectrum (either currently or as an example of an idealized future state).

**Figure 2: Information and Control Spectrum of Performance Management**

**Centralized, High-Control Model**
- Managers / organization sets goals, directs behaviors, assesses employees
- Employees respond to this direction / stimuli
- Employee performance determines performance outcomes

**Distributed, Low-Control Model**
- Employee sets goals for themselves and team, with dedicated assistance from coach and organization
- Employee owns behaviors / activities and is held accountable for those and relevant outcomes by team, coach, and network
- Employee is measured, based on behaviors (assessed by network) and impact on business outcomes (assessed by objective measures)

**Assumptions:**
- Manager / organization has greatest knowledge of what direction employees should go in and how they will respond to stimuli
- Primary stimuli that determines employee activities / behaviors / performance result from manager / employee
- Employee’s individual activities / behaviors determines performance outcomes, with relatively little impact resulting from team or network

**Assumptions:**
- Employees want to take initiative and own their performance
- Coaches can gain an adequate skillset to guide employees (so those who were managers move to a different skillset of actually being coaches)
- Clear accountability can be created
- Relevant individuals can be identified to give feedback and that feedback will be mostly even-handed
- Organizational culture is adequately trusting that colleagues’ feedback is seen as useful and without undue political intent

The other (related) factor that leaders will need to consider as they design their next-generation performance management approach should center on the organization's need for forms of centralized control over data, information, processes, etc. As highlighted in Figure 3, we believe there are at least three different options that organizations may take as they consider the extent to which they want to adjust the degree of centralized control.

- **Option A**—Manager-owned PM. Manager is still the “decider” on performance direction and effectiveness, based on wider sources of data. Closest to status quo.
- **Option B**—Joint manager / direct report-owned PM. Manager and direct report collaboratively identify goals, taking into account direct report’s responsibilities...
on both an individual and team basis. Manager, direct report, teams, and the broader network provide feedback that manager and direct report discuss and is ultimately used to drive appraisal.

- **Option C—Individual-owned / coach-supported performance management.** Individual, with support of coach, determines goals, reflects on performance, solicits performance feedback, and analyzes feedback for actions steps. Appraisal result of “objective” metrics and / or team leaders’ assessments.

- **Other Options—Something different altogether.** To be determined.

**Figure 3: Focus on Network Ownership Spectrum of Performance Management**

![Network Ownership Spectrum](source)

**Data-Driven Performance Culture**

- **Option A:** Manager-Owned PM
- **Option B:** Joint Manager / Direct Report-Owned PM
- **Option C:** Individual-Owned / Coach-Supported Performance Management
- **Other Options:** Something Else Entirely!

Variance will depend on organization’s need for forms of centralized control over data, information, processes, etc.

**KEY POINT**

Leaders should ask themselves some hard questions to identify the core principles that describe their philosophy of performance management.

Given the variance in the underlying assumptions and degree of control and transparency in the models at either end of the spectrum, leaders should ask themselves some hard questions to identify the core principles that describe their philosophy of performance management.

**Key questions to consider may include the following.**

1. What primary outcomes are we designing for with our performance management approach (i.e., identify data to make compensation or talent-related decisions, enable managers / direct reports to have improved performance conversations, increase employee engagement, enable more self-directed performance from employees, drive higher performance)?

2. What are our fundamental beliefs about our managers and their direct reports?
   a. To what extent do we believe all individuals in our organization come to work each day with an earnest desire to do their best work?
   b. To what extent do we believe we need individuals to “watch over” each other, to ensure they remain on task, aligned to organizational goals, and accountable for achieving those goals?
c. How much do we trust managers to act as coaches to guide performance versus assess it?

d. To what extent do we trust individuals in the organization to treat data and information appropriately?

3. To what extent do our fundamental beliefs about our managers and their direct reports align or clash with our current or desired organizational culture? What can our organization do to reinforce or address that alignment / misalignment?

4. In what ways can we redesign our performance management activities to reinforce our fundamental beliefs about managers / direct reports and our current / desired culture?

5. What is the appetite for change in the organization to make a shift in approach, and to what extent can HR, senior leaders, and those currently in manager roles support that shift?

An example of one organization that is on the far right of the spectrum (meaning it trusts deeply in the capabilities of its employees to provide useful feedback to each other and make data widely available) is Raizlabs as discussed in the following case in point.

Case in Point: How Raizlabs Creates a Data-Rich, Team-Enabled Performance Approach

Founded in Boston, Massachusetts in 2003, Raizlabs today is a leading developer of apps across four dominant mobile platforms, designing and launching more than 100 apps for a wide range of clients, with 75 employees. In 2013, the company had 24 employees and the CEO reviewed all appraisals—and made all administrative decisions (e.g., promotion, bonus, salary). However, the process was not scalable, highly unpopular, provided little actionable insights, and was not aligned to the team-based culture.

In 2014, the company made the decision to completely overhaul its performance management approach. Raizlabs wanted a process that would leverage the company’s flat organizational structure, its team-based model and, critically, develop a process that would address three critical issues:

1. Help employees improve and get better at their jobs
2. Ensure the company had the right people in place
3. Identify the type of talent and culture that would be successful at Raizlabs

To do this, it completely eliminated the traditional top-down performance appraisal, opting for a culturally relevant, team-based, data-rich approach. Today, the company utilizes a quarterly survey, built around four cultural values (with 30 subvalues) to provide team feedback. More specifically, the survey:

- Takes no more than 10 to 12 minutes to complete
- Includes a minimum of six reviewers per employee

(cont’d on next page)
Uses concrete language instead of numeric values to describe employee behaviors
- Avoids any option for neutral answers and all reviewers have to answer all questions
- Provides options for qualitative commentary
- Gives all employees the same two-hour window to complete the survey

Once collected, data is normalized to make comparisons across individuals or groups equally, and to eliminate any potential bias by overly positive or negative reviewers. In addition, an in-house system automatically calculates and reports results. Today, the entire process—start to finish—is completed in a business week.

Figures 4 and 5 offer examples of these survey and report forms.

**Figure 4: Requesting Feedback**

Source: Raizlabs, 2016.
The new quarterly framework has created major shifts with promotions, bonuses, and salary increases. Today, the biggest driver of compensation is an employee’s relative performance on the survey scores. In addition, leaders are using the quarterly results to provide spot bonuses to high scorers, as well as to identify employees who are performing at very high levels. The company reports several key results including:

- 100 percent participation by employees
- The average employee receives hundreds of constructive comments
- Raizlabs estimates that, since implementing the new approach, 75 percent of its promotions can be attributed to the development of individuals based on feedback from their teams
- Employee engagement has improved and turnover has decreased; additionally, Raizlabs attributes 33 percent of involuntary turnover to information obtained, over time, through the team-based approach
The Possible Future of Performance Management

What Else Might Influence the Future of Performance Management?

Even though this article represents our best current view on the future of performance management, we acknowledge there are some areas we have not addressed that may prove to have an important influence. Some of these include the following.

1. **The relationship between individual performance and teams in terms of evaluations and compensation.** Even though we discussed the importance of setting and maintaining alignment with team goals and the impact that getting team feedback should have on performance management, we did not spend a lot of time in this article discussing how best to assess (and then compensate) individuals in the context of team performance. The primary reason for this is that we have not seen enough organizations addressing this important topic effectively to share meaningful insights at this time. That said, we recognize that, with the overall shift to teams of teams, this will likely be an area that may require organizations’ focus and innovation. We intend to continue research in this area.

2. **Maintaining procedural fairness in the context of continuous performance management.** The downside of increased local autonomy is that the consistency of performance management activities may decline, reducing employees’ perceptions that they have clear goals and are being assessed fairly. When performance management is being used for assessments that connect to compensation (as well as talent management activities such as promotion, succession, and leadership development and learning), it is critical to remember that procedural fairness needs to remain present.

3. **Additional technological changes.** We have likely only begun to see the impact of cognitive technologies, artificial intelligence, automation, and the like. These changes should not only affect the work employees do and how that work gets done, but the very definition of teams and colleagues themselves. For example, how do you assess “teamwork” if an employee’s team is primarily comprised of Alexa- or Watson-like technologies? Additional changes are likely that could affect how organizations optimize and enable work.

Reflection

It is no secret that performance management has been evolving and that is likely to continue. In particular, different approaches to performance management can be thought of as falling somewhere along a spectrum with hierarchical, centralized control on one end and networked, distributed, low-control on the other.
While most organizations’ performance management approaches continue to display features of high control, we do foresee that more organizations have and will likely continue to shift toward the other end of the spectrum. This shift may require organizational leadership to ask themselves tough questions that get to the core of their performance management philosophy, which will likely guide their performance management approaches.

Key Takeaways

- There has been a shift from hierarchically-driven performance management to a more-networked approach.

- This shift can be illustrated as a spectrum in which performance management is characterized by high, centralized control at one end, and low, distributed control at the other end.

- Most organizations continue to take an approach to performance management that is more hierarchically driven.

- Leaders should clearly define and articulate the organization’s philosophy of performance management as they begin to move along the spectrum to a more network-driven, low-control approach to performance management.
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