



Performance Management Maturity Framework and Feature Checklist

A best-practice guide for implementing Quantum Workplace's performance features to drive employee, team, and business success

INTRODUCTION

Our Performance Management Maturity Framework is a simple tool to help you think through how to successfully evolve your approach to performance management.

Moving away from a dated, traditional approach to performance has many benefits. However, jumping straight to a sophisticated, modern approach may be too much change at once for your organization—leading to less-than-successful adoption and behavior change.

We'll help meet you where you are today and partner with you on your journey to where you want to be.

While many organizations may launch single performance features to get started, there are great benefits to integrating features. By integrating Goals, Feedback, and Recognition into 1-on-1s you can have higher quality conversations that better inform Talent Reviews.

Using features together will help your organization mature your approach over time, as well as how you use each individual one.

GETTING STARTED

Implementing Quantum Workplace's performance features requires answering important questions to better understand your organization's strategy for motivating and coaching to high-performance.

To help you along the way, we created these resources to guide your launch and use of our performance tools and features.

1. Performance Management Maturity Framework

Use the matrix to identify where your organization is currently and what steps to take to move your performance management program forward.

2. Performance Initiatives Design Recommendations

Review our recommendations to begin building your performance management program design.

3. Performance Management Design Checklists

Use each checklist to reflect on progress and see what steps are next to keep your program on the right track.

PERFORMANCE MANAGEMENT MATURITY FRAMEWORK

This framework shows the progression from more traditional performance models to mastering an integrated, continuous performance management program.

Here are the breakdowns for each of our performance features:

Traditional*

Infrequent, fully focused on past performance, bureaucratic, often used for pay, bonus, promotion, or merit decisions.

Launching

This phase introduces shared responsibility and multiple, ongoing inputs.

Developing

Building off the benefits of Launching, this phase focuses on strengthening relationships and trust.

Mastering

This phase signals strong relationships, high levels of trust, shared accountability, and ownership.

	Traditional	Launching	Developing	Mastering
1-on-1s	Annual or bi-annual performance reviews, which are used to determine compensation and promotion eligibility	2-3 performance conversations or check-ins per year to create better awareness of performance levels and strengthen alignment between a manager and employee	Quarterly conversations that focus on performance and other key topics like employee development and employee experience, aiming to motivate performance and drive employee engagement	Ongoing 1-on-1 (minimum monthly) conversations that are dynamic and future-focused
Goals	Minimal or no goal setting	Goal setting on a predetermined cadence (e.g. annually)	manager- and employee-defined goals that clarify what matters and help measure performance	Dynamic, aligned goals that focus on individual, team, and organizational-level work and achievement
Feedback	Top-down feedback on past performance	Manager and employee review performance, transition from evaluation to development	Project and work feedback from manager and team that supports employee learning	In-the-moment feedback organization-wide (up, down, and across the organization)
Recognition	Top-down, awards or rewards-based recognition	Democratizing recognition, peer to peer recognition	Recognition that drives meaningful behaviors and celebrates employees	Multi-directional recognition that drives meaningful behaviors and celebrates employees
Talent Reviews	Lack of talent reviews or annual talent review using the 9-box matrix	Biannual talent reviews for leadership positions or key roles	Biannual talent reviews for all employees and quarterly talent reviews for leadership positions or key roles	Quarterly talent reviews for all employees, with ad-hoc talent review updates whenever changes occur (e.g. employee performance changes)

DESIGN RECOMMENDATIONS & FEATURE CHECKLIST

As you prepare to launch Quantum Workplace's performance management software tools, you'll need to make several design and configuration decisions. These should support and align with your current talent strategies and reveal opportunities for growth within your program.

To make it easy on you, we've illustrated which design and configuration decisions are most commonly chosen based on each phase to use as a baseline to adapt and adjust to best fit your organization's needs.

To ensure your approach aligns with your chosen phase of our maturity framework, review each tool's recommendations and use the corresponding checklist to take note of any gaps or opportunities.

Pro Tip*

We've left the Traditional phase off our maturity framework to emphasize the importance of frequent and integrated opportunities to boost employee performance and engagement. While we know these practices may still be common in many organizations or programs today, we want to encourage you to implement more meaningful, effective, and engaging approaches to performance.



1-ON-1S DESIGN RECOMMENDATIONS

Our 1-on-1 tool is flexible to cater to your organization’s performance conversation strategy. Regardless of your organization’s maturity with 1-on-1s, this matrix can help you uncover gaps and reveal opportunities for growth.

	Launching	Developing	Mastering
Objectives	Encouraging two-way conversations with both managers and employees contributing.	Making continuous, healthy conversations a habit that positions managers as a coach.	High-quality, dynamic conversations that allow for continuous alignment.
Who launches 1-on-1s?	Administrators launch cycles by loading participants, setting milestones, and opening and closing when employees and managers can give input.	Administrators launch cycles by loading participants, setting milestones, and opening and closing when employees and managers can give input—commonly for goal-setting 1-on-1s and performance reviews. Users can initiate 1-on-1s throughout the year to supplement Administrator-launched cycles. These conversations may cover a variety of topics, spanning beyond goal-setting and performance.	User-initiated as part of anytime cycles that are always “on” for continuous conversations throughout the year. Managers and employees own launching all year long.
How structured will 1-on-1s be? <small>(Will 1-on-1s use a specific, pre-designed template?)</small>	Structured. Administrators will launch cycles with specific pre-designed 1-on-1 templates.	Structured for key topics like goal-setting and performance reviews that are launched by Administrators via cycles. Additional 1-on-1 templates can be made available for managers and employees to use for other conversations, or managers and employees can design their own agenda.	Structured for key topics like goal-setting and performance reviews. Additional 1-on-1 templates can be made available for managers and employees to use for other conversations, or managers and employees can design their own agenda.
What topics will be discussed in 1-on-1s? <small>(For structured conversations, use a pre-designed Quantum Workplace template or build your own for each topic)</small>	<ul style="list-style-type: none"> • Goal-setting • Goal progress • Employee performance • Employee development 	<ul style="list-style-type: none"> • Goal-setting • Goal progress • Employee performance • Employee development • Workload • Engagement • Challenges • Successes • Ideas 	<ul style="list-style-type: none"> • Goal-setting • Goal progress • Employee performance • Employee development • Workload • Engagement • Challenges • Successes • Ideas
How frequent will 1-on-1s take place?	2-3 performance conversations or check-ins per year launched via cycles.	Quarterly performance conversations, plus at least bi-monthly conversations or check-ins.	Ongoing 1-on-1 (minimum monthly) conversations that are future-focused, prioritizing growth and development.



1-ON-1S CHECKLIST

Before you launch 1-on-1s, let's review your approach to determine if you've incorporated as many best practices as possible.

This will ensure that your organization's usage of 1-on-1s will build habits that drive employee engagement and performance.

Our 1-on-1s:

- Give employees a voice in critical topics
- Lead to productive conversations
- Result in clarity about performance expectations, priorities, and next steps
- Help build trust between managers and employees
- Help employees understand where their performance stands
- Position managers to coach to employee performance and development
- Promote fairness and opportunity for growth
- Focus on development and not just past performance



GOALS DESIGN RECOMMENDATIONS

Our Goals tool helps people leaders align their team’s objectives across the organization. Regardless of your organization’s maturity with Goals, this matrix can help you uncover gaps and reveal opportunities for growth.

	Launching	Developing	Mastering
Objectives	<p>For employees, goals provide a clear understanding of how their performance is measured.</p> <p>For managers and HR, employee goals provide visibility into progress and performance that may be used for talent decisions like pay raises or promotions.</p>	<p>For employees, goals provide a sense of purpose and understanding of how they contribute to the organization’s success.</p> <p>For managers and HR, employee goals provide opportunities for continuous coaching and development.</p>	<p>For employees, goals provide a sense of ownership and empowerment.</p> <p>For managers and HR, employee goals allow for more strategic talent decisions such as succession planning.</p>
Who sets goals?	Leaders or managers cascaded to employees.	Employees and managers collaboratively set goals based on organization objectives.	Employees are empowered to set goals based on organization objectives with some or little manager collaboration.
How often are goals set?	Annually or biannually	Biannually or quarterly	Quarterly or dynamically
What types of goals exist?	<ul style="list-style-type: none">• Individual performance goals• Team goals• Department goals	<ul style="list-style-type: none">• Individual performance goals• Individual developmental goals• Team goals• Department goals• Organizational goals	<ul style="list-style-type: none">• Individual performance goals• Individual developmental goals• Team goals• Department goals• Cross-functional shared goals• Organizational goals
Who has visibility into goals?	<ul style="list-style-type: none">• Upline managers and leaders• HR leaders	<ul style="list-style-type: none">• Upline managers and leaders• HR leaders• Goal collaborators	<ul style="list-style-type: none">• Everyone inside the organization—mostly public
Do goals align with one another?	Sometimes	Yes	Yes



GOALS CHECKLIST

Before you launch Goals, let's review your approach to determine if you've incorporated as many best practices as possible.

This will ensure that your organization's usage of Goals will build habits that drive engagement and performance.

Our Goals:

- Provide employees clarity on priorities and performance expectations
- Give visibility into progress, achievements, and challenges to managers, HR, and peers
- Promote fairness and opportunity for growth
- Give employees a sense of ownership
- Help employees understand how their work fits into the organization's goals and success



FEEDBACK DESIGN RECOMMENDATIONS

Our Feedback tool helps employees ask for and receive critical performance feedback, and managers become better coaches to drive performance. Regardless of your organization’s maturity with Feedback, this matrix can help you uncover gaps and reveal opportunities for growth.

	Launching	Developing	Mastering
Objectives	Actively incorporating feedback as part of your organization’s overall performance or development culture.	Making asking for and giving feedback accessible to anyone, at any level—improving the quality of feedback.	Building an organizational culture with a strong foundation of trust and psychological safety that promotes healthy and honest feedback between employees at all levels.
How will feedback be used?	To inform performance conversations and ratings.	To inform performance conversations, ratings, and developmental goals	To inform performance conversations, ratings, and developmental goals. More broadly, feedback drives personal growth, confidence, and learning.
Who launches feedback requests?	Administrators launch a cycle to the entire organization, job function, or business unit.	Cycles are launched by administrators or employees (for themselves).	Anyone can request feedback or give feedback, either for themselves or someone else.
Who receives feedback?	Individual contributors or direct reports.	Everyone in the organization receives feedback as it’s relevant to their role and contributions.	Everyone in the organization receives feedback, unbounded to their role or type of feedback.
Who provides feedback?	Managers, peers, and direct reports.	Anyone with visibility into an employee’s work and contributions.	Anyone relevant to the feedback request.
How structured is feedback?	Structured. Feedback templates are built to assess competencies and other expected behaviors.	Structured for key needs like 360 feedback. Additional feedback templates can be made available for managers and employees to use, or managers and employees can design their own agenda.	Employees are empowered to design feedback requests that best suit their needs without having to rely on structured feedback templates.
What is the feedback about?	Performance progress, tasks, and workload.	Cultural behaviors, core values, skills, or competencies—sometimes project-based.	Cultural behaviors, core values, skills, competencies, or personal growth opportunities.
How frequently is feedback requested or given?	Annually or biannually	Biannually or quarterly	Frequently enough to feel like an ongoing process—at least quarterly
Is feedback attributed or confidential?	Confidential or by using Focused Feedback .	Depending on the type of feedback, confidential or attributed, but attributed feedback should be more common.	Attributed



FEEDBACK CHECKLIST

Before you launch Feedback, let's review your approach to determine if you've incorporated as many best practices as possible.

This will ensure that your organization's usage of Feedback will build habits that drive engagement and performance.

Our Feedback:

- Promotes a focus on behaviors, not personal traits
- Solicits specific, actionable feedback
- Is used for developmental goals or coaching
- Reduces or eliminates biases in evaluating employee performance



RECOGNITION DESIGN RECOMMENDATIONS

Our Recognition tool is simple to implement and use. Regardless of your organization's maturity with recognition, a simple approach can create immediate value in your organization.

	Launching	Developing	Mastering
Objectives	Making employees feel valued at key milestones	Making employees feel valued at key milestones Celebrating behaviors that matter Communicating the impact of great work	Making employees feel valued at key milestones Celebrating behaviors that matter Communicating the impact of great work Making peer-to-peer recognition a natural part of your organization's culture
Who should have access?	All employees	All employees	All employees
What badges should we use?	<ul style="list-style-type: none">• Core values• Service anniversaries• Internal awards (*restricted access)	<ul style="list-style-type: none">• Core values• Service anniversaries• Internal awards (*restricted access)	<ul style="list-style-type: none">• Core values• Service anniversaries• Internal awards (*restricted access)



RECOGNITION CHECKLIST

Before you launch Recognition, let's review your approach to determine if you've incorporated as many best practices as possible.

This will ensure that your organization's usage of Recognition will build habits that drive engagement and performance.

Our Recognition:

- Allows great work or desired behaviors to be celebrated in real-time
- Creates a culture where anyone can recognize another individual or team
- Helps employees feel valued through in-feature storytelling and social engagement



TALENT REVIEWS DESIGN RECOMMENDATIONS

Our Talent Reviews tool gives HR leaders performance insights to make smarter talent decisions. Regardless of your organization's maturity with Talent Reviews, this matrix can help you uncover gaps and reveal opportunities for growth.

	Launching	Developing	Mastering
Objectives	Talent decisions for leadership positions and key roles, such as promotions or succession plans, are informed by more current, less biased data.	Talent decisions for all levels and roles are informed by more current, less biased data. Employee performance, growth or promotion readiness, and retention are discussed more regularly throughout the year.	Employee performance, growth or promotion readiness, and retention are top of mind and discussed throughout the year. This provides a robust and dynamic picture of talent at all levels and roles, allowing proactive action and more informed decision-making.
Who launches Talent Reviews?	Admins via cycles	Admins via cycles	Admins via cycles
Which employees (e.g. roles) are evaluated?	Leaders, managers, and key roles (e.g. roles that are difficult to hire for or critical to business success).	All employees	All employees
Who contributes to Talent Reviews?	Managers or cross-functional leaders who directly work with the employee.	Managers, cross-functional leaders, or project leads who directly work with the employee.	Managers, cross-functional leaders, project leads or others who directly work with the employee.
What is evaluated in Talent Reviews?	We recommend using Quantum Workplace's set of questions that assess employee performance, growth or promotion readiness, and retention risk.	We recommend using Quantum Workplace's set of questions that assess employee performance, growth or promotion readiness, and retention risk.	We recommend using Quantum Workplace's set of questions that assess employee performance, growth or promotion readiness, and retention risk.
How often are Talent Reviews conducted?	At least biannually	At least biannually for all employees At least quarterly for leadership positions or key roles	Quarterly for all employees, and ad-hoc updates as needs, challenges and risks change throughout the year.



TALENT REVIEWS CHECKLIST

Before you launch Talent Reviews, let's review your approach to determine if you've incorporated as many best practices as possible.

This will ensure that your organization's usage of Talent Reviews will build habits that drive engagement and performance.

Our Talent Reviews:

- Are frequent enough to allow for agile talent-decision making
- Reduce or eliminate biases in evaluating employee performance