



EMEA USER CONFERENCE

TOTARA PERFORM

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Learning & Development
Manager, AG Barr

Freedom to Learn

WHY TOTARA PERFORM

Basic performance management features are available in Totara Learn.

But there's a growing need for more **dedicated tools**.

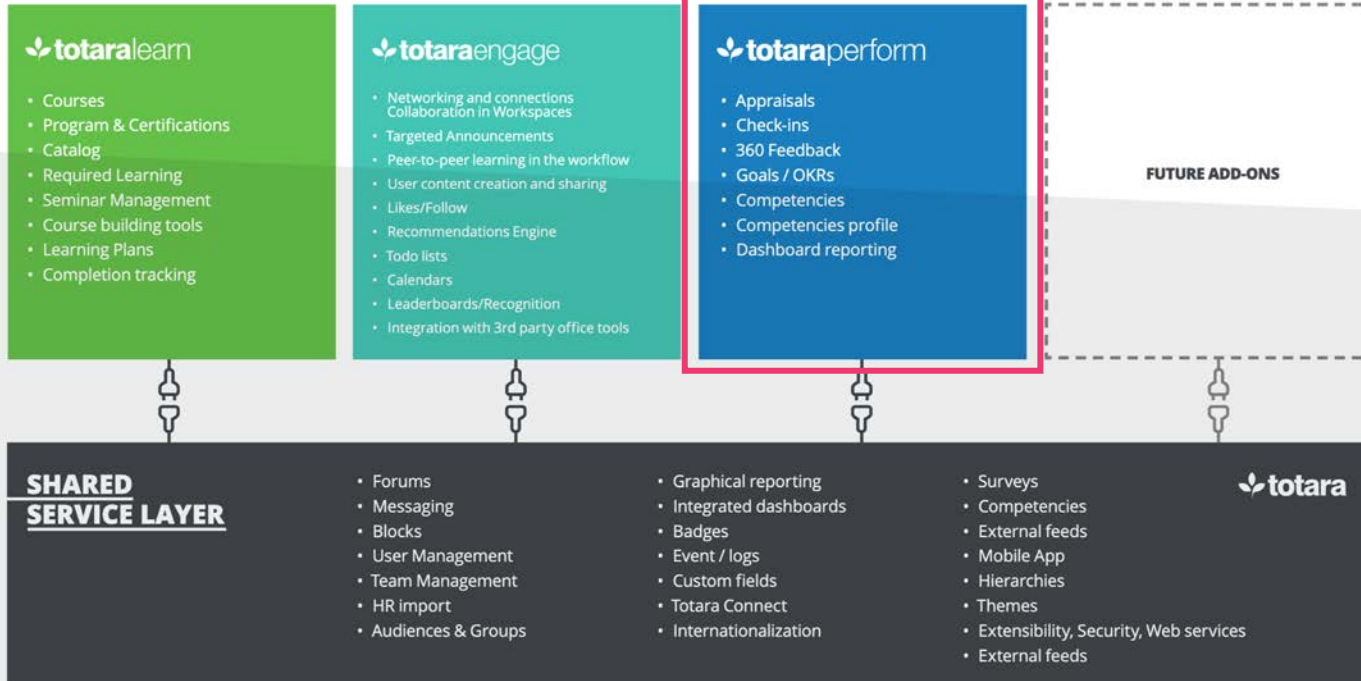
Organisations need the **flexibility** to operate the workflows that work best for them.

- Traditional periodic performance reviews/appraisals
- Continuous performance feedback models
- Everything in between!

Totara Perform is a suite of performance tools designed to support you **now and into the future**.

WHERE DOES PERFORM FIT

AUTONOMOUS AND INTERCONNECTED PRODUCTS

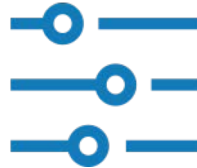


OUR VISION FOR PERFORM

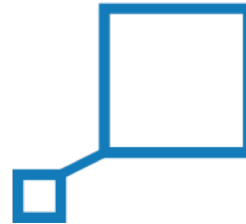
Our solution will be a comprehensive, effective set of tools for managing staff performance that will be:



Easy to use



Flexible



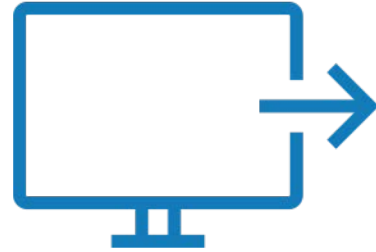
**Suitable for all
sizes of companies**

OUR VISION FOR PERFORM

Perform should:

- Support **traditional** as well as **modern performance management practices**
- Support **easy user customisation**
- **Integrate seamlessly** with other **Totara products**

...resulting in a suite of products that offer even greater value than they would individually.





PERFORM V1 ROADMAP

All Performance Management features currently in Totara Learn will persist within Totara Perform.

Totara Perform will include enhancements, either requested by our community or driven by a response to competitor and market trends.

PERFORM V1 ROADMAP

FEATURE	V1
Competencies	Decoupled from Learning Plans centralised management, extendable criteria and new tracking options
Evidence	Decoupled from Learning Plans, ability to create forms with specific fields per evidence type
Goals	Support for popular Goal frameworks such as Objectives and Key Results (OKR's)
Appraisals and 360 feedback	More flexible and dynamic with a modular approach resulting in introduction of Performance cycles
Check ins	Ability to create micro scheduled or ad hoc Performance Reviews
Dashboards	Visual reporting (users and admins, high level and drill down, process and outcomes)
Notifications	Improved tools for managing/scheduling system notifications

COMPETENCIES IMPROVEMENTS

- Dedicated Competency Profile
- Extended the methods available to allocate
- Reduced the complexity surrounding set up and allocation
- Improved tracking of Competencies progress for individuals and Organisations



COMPETENCY PROFILE

Performance cycle Goals **Competencies** Objectives Evidence

Florence Nightingale
Competency Profile



Self-assign competencies

★
Latest achievement:
Interpersonal Relationships



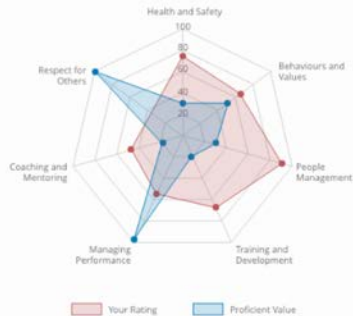
Registered Nurse



Team Leader

View 

Registered Nurse



Team Leader



APPRAISALS IMPROVEMENTS

- New and improved user interface
- Improved user engagement in the Performance process
- Greater flexibility for handling of new starters and changes to position
- Better handling of changes to an appraisal
- Better handling of multiple job assignments & dynamic relationships
- Improved reporting for both end users and administrators



PERFORM DASHBOARD

Performance cycle Goals Competencies Objectives Evidence

1 January 2019 - 31 December 2019

Wellington District health board 2019 Performance Cycle



[See detailed Performance process](#)

+ Add new activity

Your activities

- Feedback
- Check-ins
- Appraisal

⚠ Overdue Activities

Mid-year review	Due date
Awaiting review from William Shatner	10 September 2019

Upcoming Activities

Task	Due date
Check-in with your Manager	10 September 2019
Write 360 reviews for James Cameron - Registered Nurse	15 October 2019
John Low - Doctor	
Kevin Hwang - Registered Nurse	

Latest updates

- 28 August 2019
You gave feedback for Sarah Hill
Great work Sarah, I really appreciate all the extra work you put into making patient X feel more comfortable in a stressful situation.
- 15 August 2019
You submitted your Mid-year review
- 10 August 2019
William Shatner completed an action from your check-in

See all updates

SIDE-BY-SIDE DATA VIEW



Bob Smith's Appraisal
Stage 2 2019

Learner answer

1. How do you feel you engage with your peers?

Write your comment.



Manager answer

1. How do you feel you engage with your peers?

Learner answer

2. Rate your performance this year to date:



Manager answer

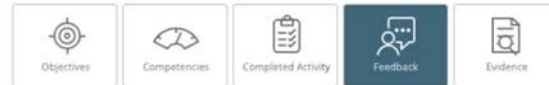
2. Rate Bob's performance this year to date:



Save

Submit

Data about you



Filter

Feedback type Peer Anonymous Yes

Date received dd/mm/yyyy and dd/mm/yyyy

Timeframe Last 6 months Filter by tag Engagement



14 February 2018
Jane Doe

Great work Bob, really appreciate all the extra work you put into putting this proposal together.



14 February 2018
Michael Harris

Really enjoyed your presentation the other day Bob, that slide about the sales process really helped me.

Attach this to

Question 1



14 February 2018
Jane Doe

Loved your presentation the other day Bob, that slide about the sales process really helped me.



14 February 2018
Sarah Hill

I really appreciated Bob's help during the onboarding process, he was very good at clearly explaining some of the more complex aspects of the job.

NEW: CHECK-INS

- Templated check-ins
- Encourage quality conversations at regular intervals
- Ability for team members and managers to book in check-ins
- Help to resolve any concerns before they become real issues
- Recognise achievements as they happen



CHECK-INS

Check-ins

< February 2019 >



20 February 2019 - 15:23
Florence N.

I've been struggling this month with a client who keeps trying to squeeze in more work into the scope, and became confrontational when I was firm about what had been agreed previously. I chatted to Terry to get his advice on how he usually handles this, and he gave me some practical tips which really helped.

20 February 2019 - 18:01
William Shatner

Being proactive about seeking out advice was the right approach - well done. Remember you can always contact me inbetween check-ins if you're struggling with something.

Reply

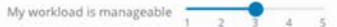
Notes

- Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod
- Tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua.
- Accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus
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Only I can see this note

Cancel Save

Self assessment



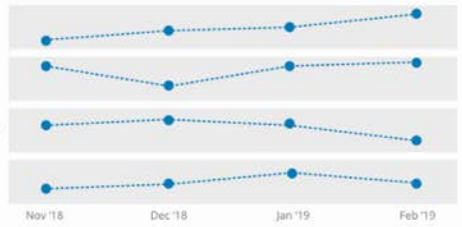
Progress

My work challenges me

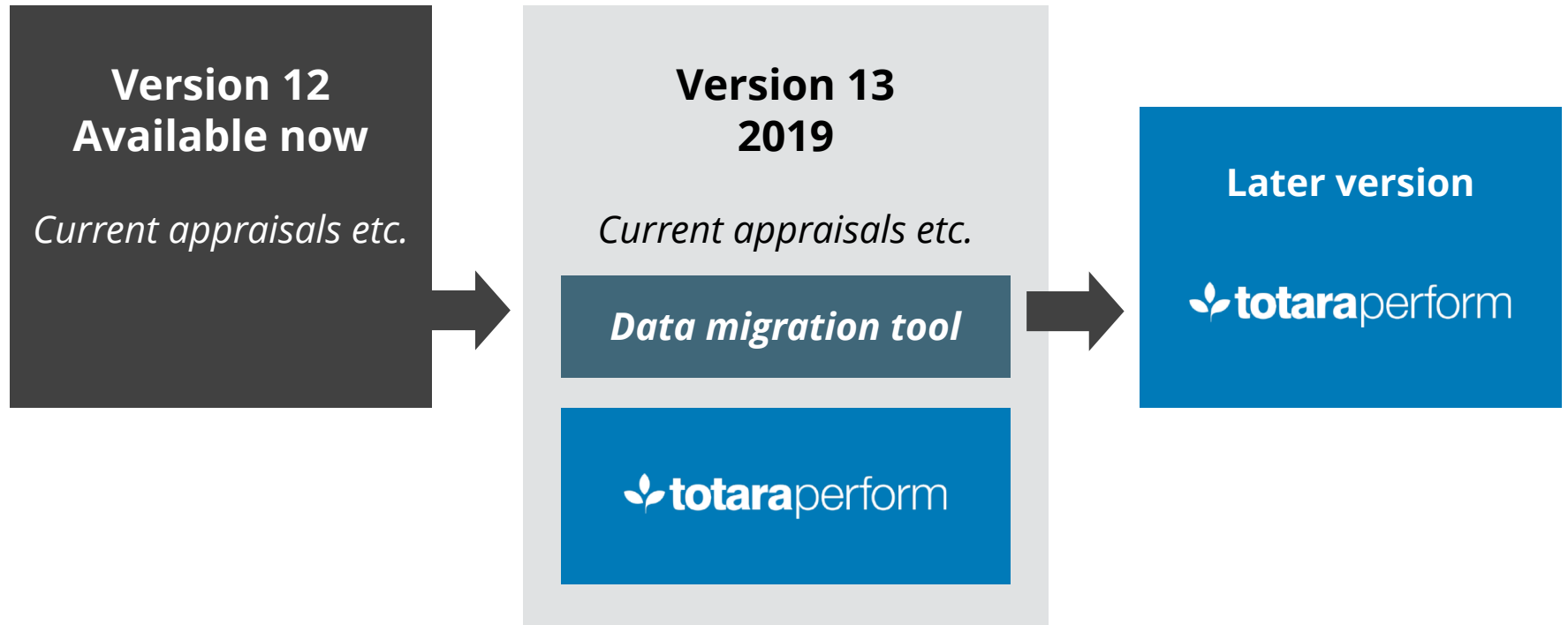
I have the support I need

My workload is manageable

My work makes an impact



MIGRATION PROCESS AND TIMELINES



PRICING

FIRST PRODUCT

*100% applicable
subscription price*

SECOND PRODUCT

*50% applicable
subscription price*

ADDITIONAL PRODUCTS

*25% applicable
subscription price*



HOW YOU CAN ENGAGE WITH US

Talk with your **Totara Partner**

Use **Totara Community** for open discussions:

<https://totara.community/mod/forum/view.php?id=7019>

Contact me: michael.ball@totallearning.com

A black and white photograph of a man with a beard and short hair, wearing a dark sweater over a collared shirt, standing with his arms crossed in a bicycle shop. In the background, several bicycles are parked in rows, and there are signs on the wall, including one that says "20% off".

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QUESTIONS

LMS Support
Admin, Halfords