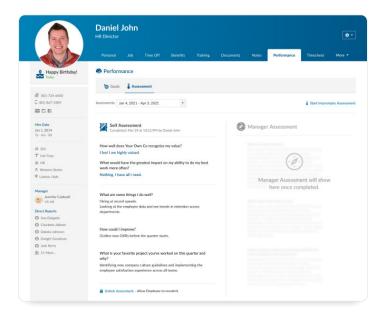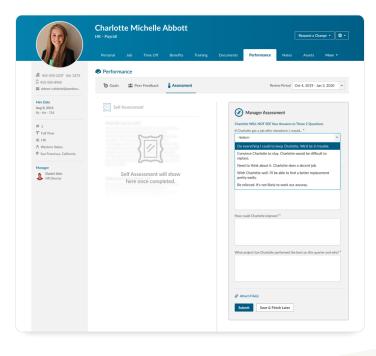# BambooHR® Performance Management Cheat Sheet for Managers

Assessments

Employees and managers receive notifications in BambooHR and their inbox when it's time to complete assessments.
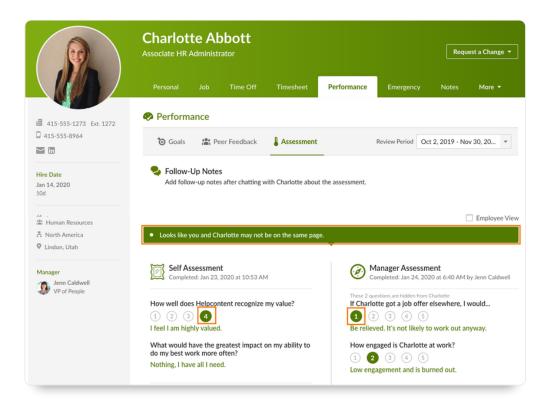

Employees complete four simple questions, after which they can see their manager's feedback on the areas where they excel and where they need improvement.

Managers also complete four questions, stating how they'd feel if the employee received a job offer elsewhere and rating the employee's engagement level. The employee can see their manager's feedback on strengths and weaknesses, but not the manager's performance and engagement assessments.
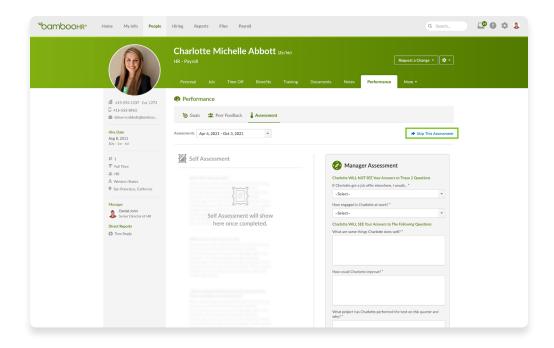
Catching Review Misalignment

BambooHR highlights any misalignments in the experience employees and managers report, helping managers know when employees see their experience differently and encouraging everyone to get on the same page. Catching a review misalignment is a good opportunity to have an open conversation with the employee to figure out the cause for the disconnect.
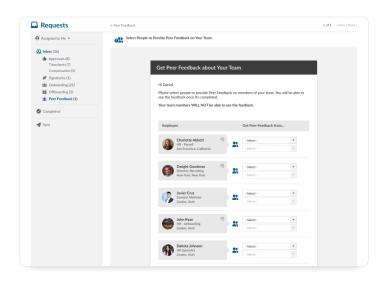
Impromptu and Skip Assessments

If you need to have an employee take an assessment outside of the regular assessment schedule, you can do so from that employee's performance tab.

Similarly, you can skip an assessment for any employee during an active assessment period. For example, an employee who just joined the company or moved to a new team might not have had enough time to showcase their performance, so you can choose to skip that employee's assessment.

Feedback

Peer feedback supplies a wider range of perspectives on an employee's performance beyond a single manager's opinion, creating a more balanced assessment of each employee's contribution.
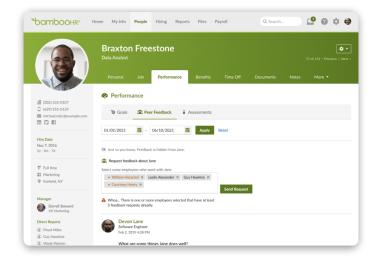

Peer feedback supplies a wider range of perspectives on an employee's performance beyond a single manager's opinion, creating a more balanced assessment of each employee's contribution. Each review cycle, managers can choose employees to review other members of their team.
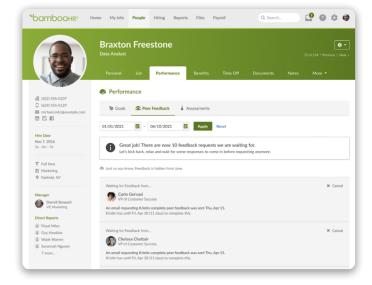

As with other performance assessments, employees receive notifications to provide feedback. Their insights on their coworkers' strengths and weaknesses appear in the manager's performance report.

Impromptu Feedback

Managers and administrators can also select additional employees to provide feedback outside of a review cycle. This helps in cases of disciplinary action or promotion considerations, when timely feedback is needed to make the right decision.

From their Performance tab, managers can add up to 10 feedback requests per employee. BambooHR sets a limit of five responses per employee, which helps keep feedback manageable for everyone and helps you know you're not imposing when you ask for feedback outside your immediate team.
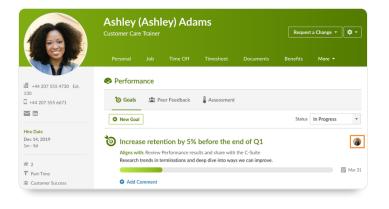

BambooHR reminds managers of all pending feedback requests and notifies them of completed requests, both in their BambooHR inbox and through email. The Performance tab will display the most recent communication sent from BambooHR to each employee, helping managers stay on top of the feedback process.

Goals

BambooHR Performance Management works best alongside regular performance conversations. As managers and employees discuss the results they'd like to see, everyone can set personal goals and track their progress. This helps keep goals specific, measurable, attainable, and time-bound.

Managers can also align individual goals to accomplish a team objective. After a manager creates a team goal, they can use the Goal Alignment field to assign subgoals to team members. When employees update their progress on these subgoals, BambooHR records their contribution to the team goal.

Employees can update their progress via the slider bar and hold ongoing conversations with their manager through goal comments.

Performance Management Status Report

BambooHR tracks the status of every performance management task managers assign. Managers can review these details in their reports tab to keep everyone accountable and on track.
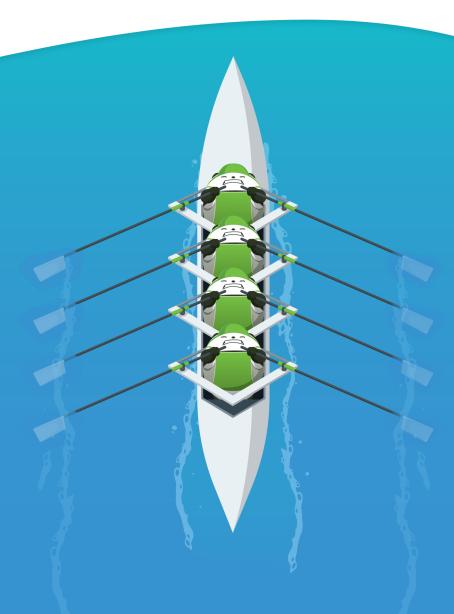
Goals Status

			More ▼

HR   Showing | In Progress |

Goals	Due Date ↑	Progress	Last Comment	
Charlotte Abbott				
100% accuracy on payroll runs in Q3 Implement new performance review process (perf...	10/01/2021	70%	0 comments	💬
Introduce new reward and recognition program Create proposal to increase reward and recognitio...	10/25/2021	70%	Daniel John - 01/27/2020 Let's present your research at the next HR all hand meeting.	💬
Christina Agluinda				
New Sales Training	09/23/2021	60%	0 comments	💬
Budget Allocation Q2	09/23/2021	90%	0 comments	💬
Daniel John				
Implement new performance review process (performance, retention, engagement)	🔴 07/01/2021	90%	Daniel John - 06/24/2021 We've implemented the new performance review process with most of the teams in the organization. We're rolling it out to Sales next week	💬
Create proposal to increase reward and recognition spend by 10%	10/25/2021	80%	0 comments	💬
Dom Pasque				
Improve quality of deploying code on fam stack	10/29/2021	30%	Dom Pasque - 04/03/2019 QA is improving checks twice a day and giving me a high five for the go head.	💬

Peer Feedback Status

			More ▼

| 09/29/2020 | — | 01/29/2021 | All Employees | Showing | All |

Receiving Feedback   Giving Feedback

Employee ↑	Receiving Feedback From	Date Completed	Due Date
Ashley Adams (2)			
	✅ Shannon Anderson	11/04/2019	11/19/2019
	Shelly Cluff	--	11/19/2019
✅ **Charlotte Abbott** (2)			
	✅ Christina Agluinda	11/04/2019	11/19/2019
	✅ Ashley Adams	11/04/2019	11/19/2019
✅ **Cheryl Barnet** (2)			
	✅ Dorothy Chou	11/04/2019	11/19/2019
	✅ Jake Ryan	11/04/2019	11/19/2019

Trust, Accountability, and Performance

BambooHR Performance Management helps you coach your employees while ensuring the quality performance that your team needs to succeed. For more tips on one-on-ones, check out this article.

If you need more information about BambooHR Performance Management, please check out our Help Center.

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