



 Microsoft  SharePoint  Office 365

# CASE STUDY

ORGANIZING A CONTINUOUS PERFORMANCE  
MANAGEMENT PROCESS IN A MID-SIZED COMPANY  
USING LANTERIA HR SOLUTIONS

# OVERVIEW

A US based service company has a complicated performance management process, which includes the following stages:

- Setup of annual goals in the beginning of the financial year. At this stage, the employees and their supervisors set up goals for the current year.
- Mid-year review, which includes 360 reviews for managers. At this stage, all employees meet with their supervisors and discuss the progress in achieving the goals set up in stage one. At the same time, the employees holding the managerial positions go through 360 assessments by their supervisors, peers and subordinates.
- Year-end review. At this stage, the employees and supervisors fill out the review forms to assess the annual goals achievement, how employees follow corporate values, and discuss goals for the next period. Also during the year-end review, the supervisor makes a proposal regarding possible salary change for the employee for the next financial year.

This process was previously managed by the HR Team manually using the Excel forms.

When the company introduced this process a few years ago, the number of personnel was relatively small. Now, with 250 employees, HR couldn't process all data promptly and the duration of each stage of the process significantly increased. The company realized that, due to their growth, they could not initiate the goal-setting stage in time, as the year-end review for the previous financial year was still in process. As a result, the employees could work without actual goals for a few months. The salary change issue also became very critical.

The company management set a goal for the HR and IT Departments to automate the performance review process to make it happen in time and eliminate any confusion that the employees and HR had using the Excel forms.

Lanteria HR got a contract for this project.

# SCOPE & SOLUTION



With the help of the Lanteria HR Performance module, the client was able to implement the following solution:

1

Using the standard functionality of the Performance module, the Lanteria team has designed a review workflow covering the entire process, starting from the goal setting phase all the way to the year-end review. The workflow included twelve steps with the possibility to put the review on hold after each stage. This ensured the continuity of the process and the possibility for the users to return to the previous stage if necessary. It is worth mentioning that the workflow is supported by the notifications and reminders sent out to the users automatically to their work mail addresses. This significantly improved the user responsiveness.

2

To design the performance review form we have used the standard review form designer where we added the sections for the current year goals, future goals, competencies and comments. In addition to this, we created the custom section where the supervisors could propose a new salary for the employee and get an approval from the budget owner and HR.



# PROJECT OUTCOME



In result of the Lanteria HR system introduction, the client got an automated performance review process required minimum efforts from the HR team.

- ✓ In the beginning of the year, the dedicated HR team member opens the annual performance review round and then the system guides the users on their next steps by sending notifications and reminders. At this, HR still gets full control over the process and can manually intercede at any point of time by moving the forms to the previous or next steps or complete reviews.
- ✓ Moreover, the standard dashboard available in Lanteria allows the company management and HR to see the current status of the process by stages in real time and undertake necessary actions to conduct the performance review process within the expected timelines.
- ✓ Another advantage of the Lanteria HR system introduction is that the history of all reviews for the previous years is now available on the Employee Card and the supervisors can access them when necessary to see the performance progress for the certain time period.
- ✓ At the next phase of the Lanteria HR implementation, the client introduced the Learning module. This allowed connecting the performance review results with the personal development plans and make the whole process even more ongoing.

# SCOPE & SOLUTION

3

Another custom solution related to the review form was to merge the results of 360 assessments with the year-end stage where the competency assessment was a part of the review. The solution allowed to populate average ratings that a manager got for each competency during the mid-year 360 process into the Competency section of the annual review form. Such solution allowed the assessor to view the result of the complex assessment conducted a few months ago and use this result for the annual rating.





# LANTERIA HR OVERVIEW



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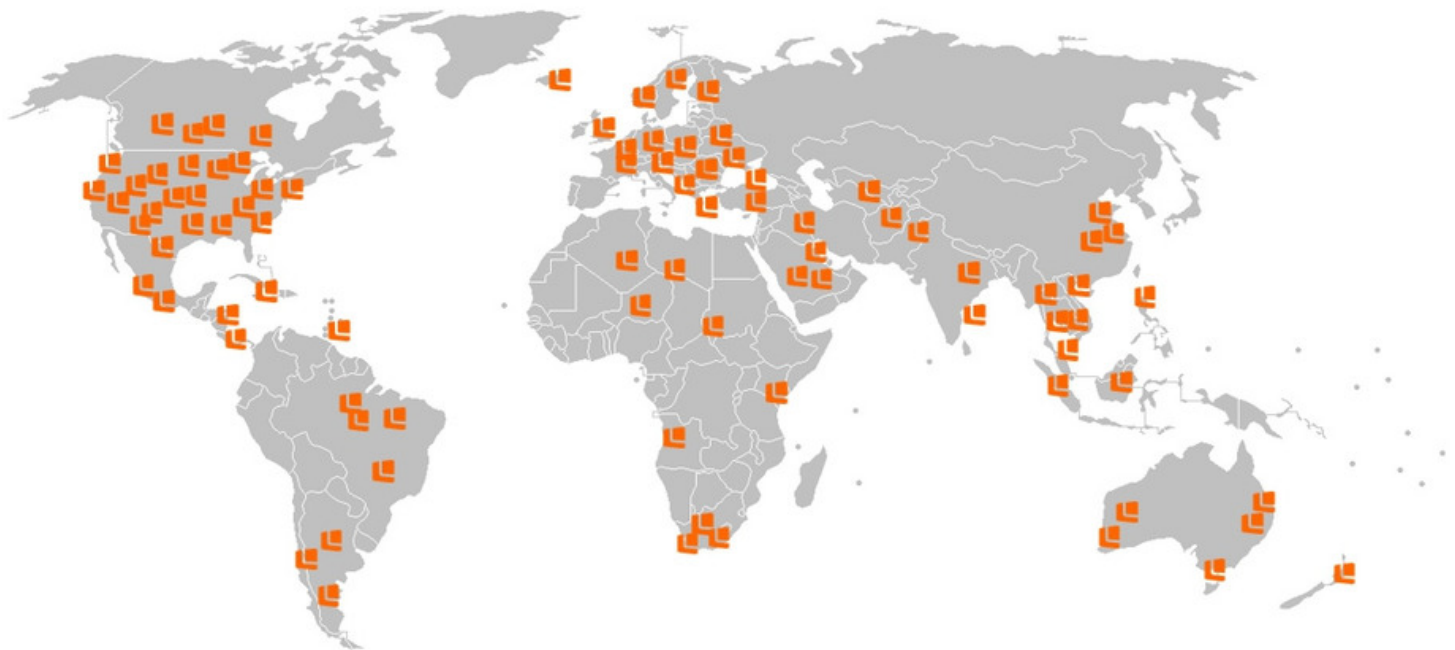


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# AWARDS

