

## Performance Review - Manager

### Summary

#### 1 Introduction

#### 2 The Performance Review form

#### 3 Filling in the Performance Review form

Manager Preparation

Performance Review and Manager Signature

View a Completed Form

# 1

## Introduction

## 1 Presentation of the Performance Review



### It is...

- **An opportunity** to discuss sincerely and objectively.
- **Sharing on the past year**, in particular on Leadership Essentials and Goals.
- **A constructive dialogue** to prepare for the future.

### Which stakes ?



- Identify **performance levels** and support **skills development**.
- Evaluate **Employee Performance**.



### For whom ?

- **All Executive Employees, Staff** (directly in ColasWay) and **Workers**.

### When ?



During the campaign:

- **Annually for all employees – Staff, Workers and Executives.**

The Performance Review - Goals for...



### The Employee

- Discuss missions and goals set.
- Share your feelings, your professional projects and your ideas for development.
- Ask questions to your Manager on various topics.



### The Manager

- Get to know your Employees better and adapt your Management.
- Evaluate their skills and the achievement of the objectives set.
- Support their development by giving them the means to progress.
- Be a role model to Employees.



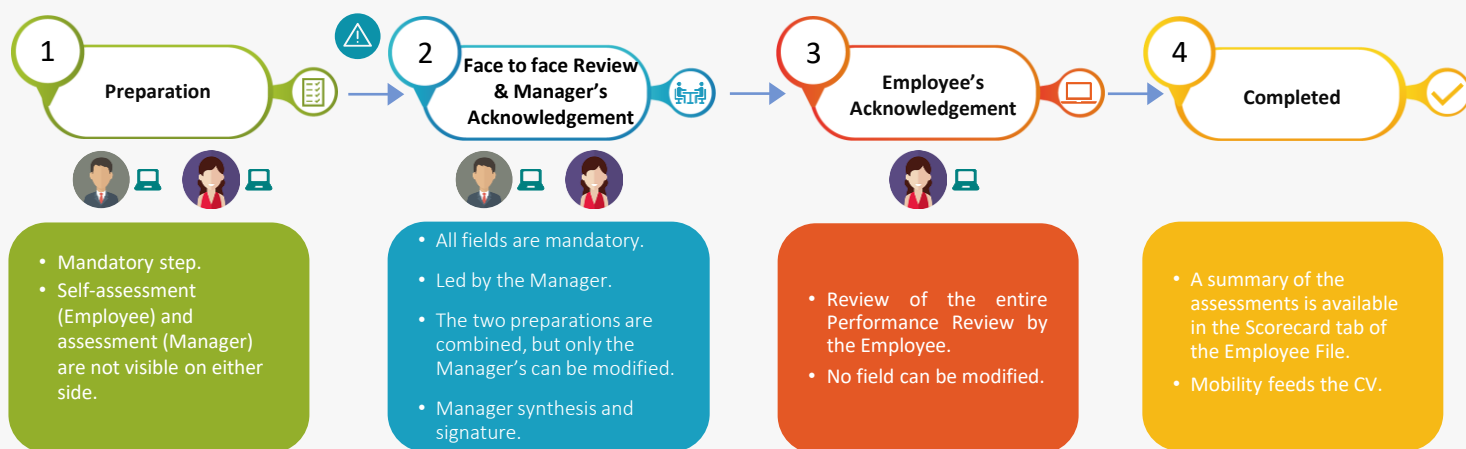
### The Top Management

- Monitor the activity and progress of each one of your Employees.
- Consider their aspirations.
- Adapt training plans.
- Manage resources according to business developments and corporate needs.

## B Presentation of the Performance Review

Once the campaign has been launched, the Employee and the Manager set a date for the Performance Review outside ColasWay. Then, they must follow the Road Map with the following steps:

This action should not be performed too early in order to give the Employee time to finalize their preparation.  
 Recommendation : the Manager should complete this action the day before or on the day of the Performance Review.



Person who 'leads' the Performance Review form

Manager

Employee

Prior to the Performance Review, the Manager must complete the following actions for each one of their Employees.

### Step 1



The Manager sets the date for the Performance Review meeting outside the tool (via Outlook or other appointment scheduling tools ) and sends the invitation to the designated Employee.

### Step 2

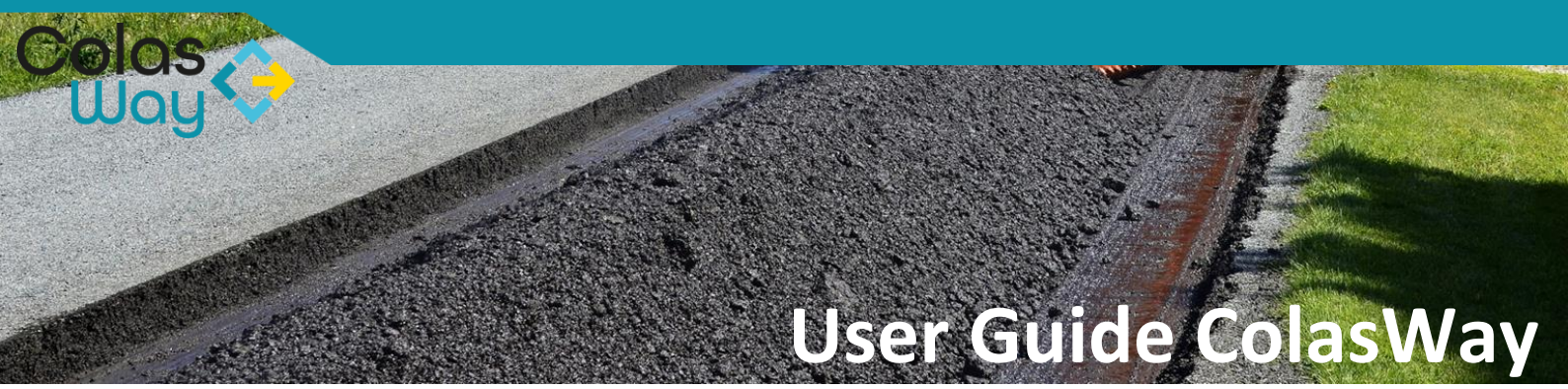


If this is the Employee's first Performance Review Campaign, the Manager indicates in ColasWay the Employee's goals from the previous year.

The Employee will ensure that his goals are met.

## 2

# The Performance Review form

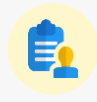


# User Guide ColasWay

## C The Performance Review : Parts and sections

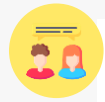


- Road Map
- Employee Information
- Interview Date (Step 2)
- Introduction



### A – PERFORMANCE REVIEW

1. Highlights of the current year
2. Leadership Essentials (L1/L2/L3)
3. Job Skills (L3)
4. Achievement of Performance Goals of the current year
5. Performance Goals for the upcoming year
6. Overall Performance Summary (Step 2)



### B – DEVELOPMENT REVIEW

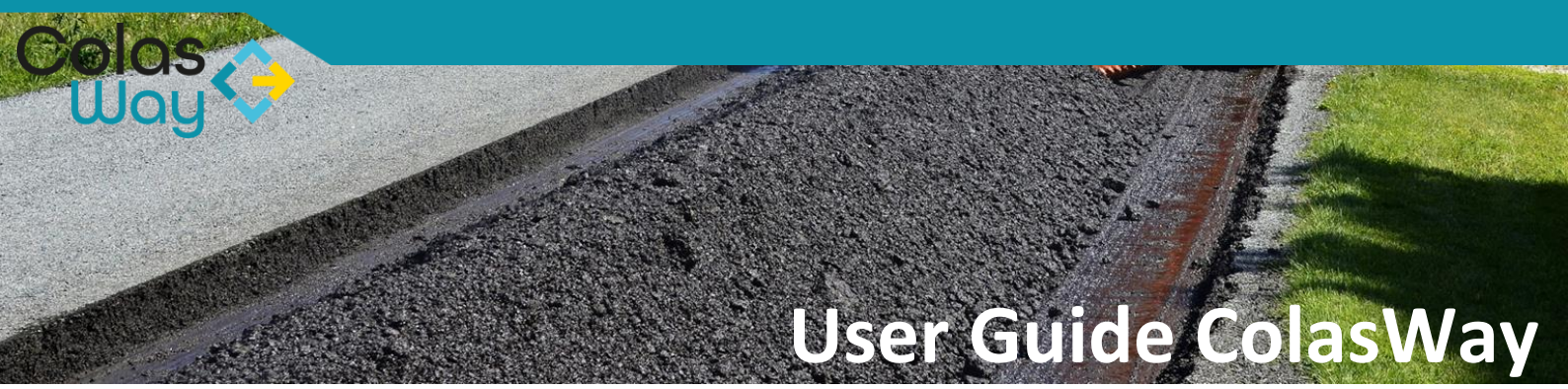
1. Development Goals of the current year
2. Development Goals for the upcoming year
3. Training needs for the upcoming year for the countries using the Training Management System (TMS)
4. Mobility preferences & Personal Considerations
5. Work-life Balance Discussion

- Manager’s Acknowledgement (Step 2)
- Employee’s Acknowledgement (Step 3)

## D The Road Map : Parts and sections

This Road Map is **visible at the top of the form**. The navigation bar allows you to easily reach the **sections of the form**.

The screenshot displays the 'Annual Performance Review - 2024/2025 for Alfred Lemke' form. At the top, there is a navigation bar with 'Assessment Forms' and a search bar. Below the navigation bar, the form title and user name 'Alfred Lemke' are visible. The 'Road Map' section is highlighted in yellow, showing a progress bar with four steps: 1. Highlights of the current year, 2. Leadership Essentials, 3. Achievement of Performance Goals of the current year, and 4. Performance Goals for the upcoming year. A dropdown menu is open for step 4, showing 'B - DEVELOPMENT REVIEW' and its sub-sections: 1. Development Goals of the current year, 2. Development Goals for the upcoming year, 3. Training needs for the upcoming year for th..., 4. Mobility preferences & Personal Considerat..., and 5. Work-life Balance Discussion.

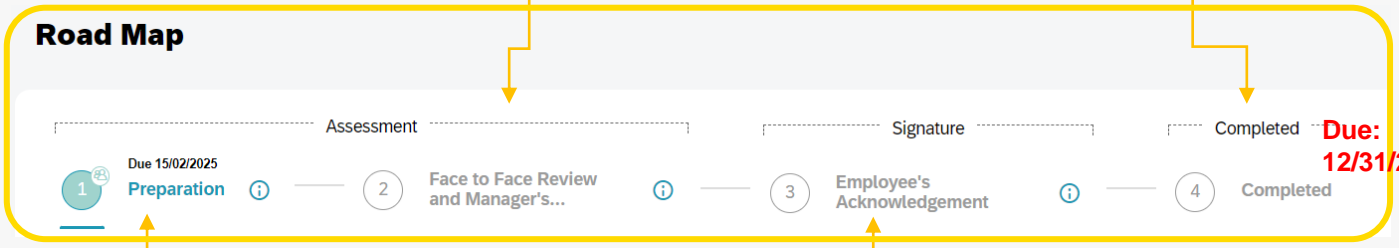


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## Reading the Road Map:

This is a **face-to-face review** between the Manager and the Employee.  
**The Manager fills in and signs** the form following the discussion with the Employee.  
 He/she can send the form back to the previous step if needed.

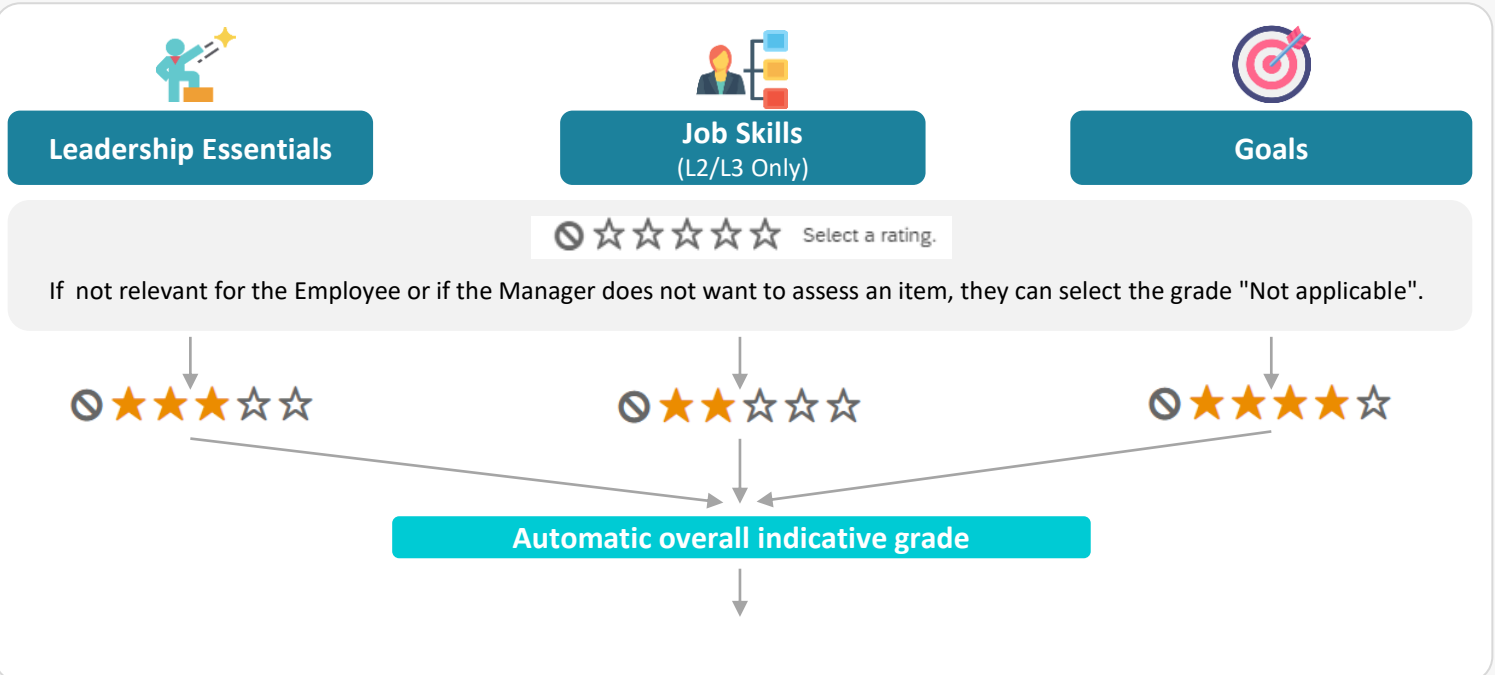
The form has been **completed** and **can no longer be modified**.



The **Employee and the Manager** have **access to the form**. Only the Manager can move on to step 2.

The form **can no longer be modified**. The **Employee** can write a summary and **sign** before sending it to step 4. They can send the form back to step 2 if needed.

## C Zooming on the Preparation



# 3

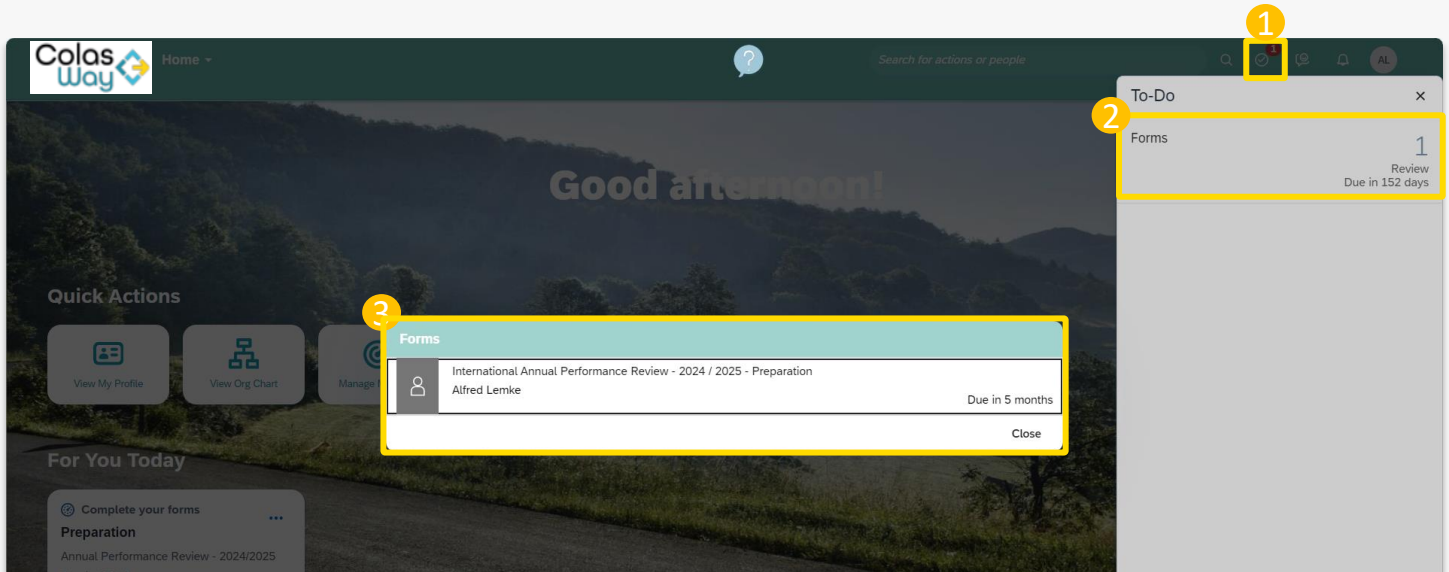
## Filling in the Performance Review form

- **A. Manager Preparation**
- *B. Performance Review and Manager's Acknowledgement*
- *C. View a Completed Form*

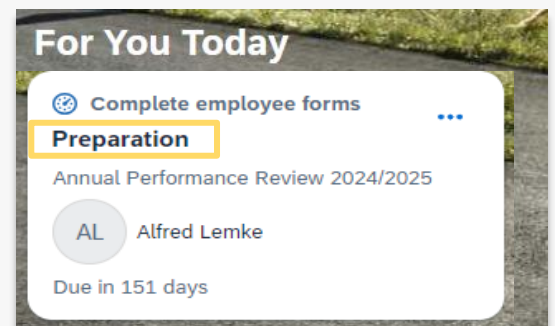


## A Employee Preparation

When you have to fill in a Performance Review form, a notification appears on your home page.



You can also access it directly from your Home page by clicking on the **Complete employee forms** tile in the **For You Today** section.



Note that even if the form is to be filled by both Manager and Employee at this Preparation step, the **form will be locked for the other party** during their completion. Make sure you “**save and close**” the form **before exiting the form**, to allow the other party to fill-in their preparation.



Any assessment (self or given) and overall comments will only be visible by both during the next step i.e. the Face-to-face Review and Manager’s Acknowledgment

The **Manager will move the form to the second step** only when they are **done** with their preparation and ***ready to meet with the employee.***

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## PART A – PERFORMANCE REVIEW

### 1. Highlights of the current year

This section allows you to describe the key events of your Employee's current year.

### 2. Job Skills (L2/L3)

#### 2. Job Skills (30.0%)

You will find in this section the skills related to the job. Only the manager can add more skills using the library by clicking on the "add" button at the top right of this section. The evaluation must consider at least 3 skills and the maximum 10.

The aim of this section is to enable you to assess the skills expected of your Employee. 5 levels are defined, as well as a "Not applicable" level. The skills that appear are linked to the key job your Employee's function is attached to.

### 3. Leadership Essentials (L1/L2/L3)

The aim of this section is to enable you to assess the skills expected of your Employee.

- For both sections 2 and 3, evaluate skills by clicking on the stars or the not applicable sign. Move the cursor over the stars to display the level.
- click on the **question mark "?"** to show the definitions of the scales.
- Click on the **information point "i"** to display the definition of the expected skill.
- Write an overall **comment** in the text bow at the bottom of the section.

#### 2. Leadership Essentials (60.0%)


The given ratings are shared at the Performance Review and Manager Acknowledgement steps.

### 3. Achievement of Performance Goals of the current year

The goals set for the current year are available in this section for the evaluation.

The weighting of goals is **equal to 40% (L1) or 50% (L2/L3)**.









As a Manager, you **can add or delete** objectives for the **current year**, employees can only edit the goal.

- assess your Employee by clicking on the **stars** or the **non-applicable** sign.
- click on the **question mark “?”** to show the definitions of the scales.
- you can add a comment to each goal for the current year .

### 4. Achievement of Performance Goals of the current year (50.0%) + Add

Evaluate the achievements of the current year's goals.

Expand All Collapse All

Goal	Rating by Myles Lyle 	Action
Test Guide utilisateur Test	     Meets Expectations	  100.0% of total score

[Goal Details](#)

Start Date	01/01/2024	Due Date	31/12/2024
Employee's comment	Employee's comment	Weight	100.0%
Manager's comment	Commentaire du Responsable		

### 4. Performance Goals for the upcoming year



When creating new goals, you can use **the goal creation aid** to follow the **SMART model**.

**S** Specific

**Goals should be clear** and indicate what you expect. **Be specific** and define what you are going to do. **Use action verbs**, such as direct, organize, coordinate, lead, develop, plan, etc.

**M** Mesurable

If you can't quantify it, you can't manage it. **Choose goals with measurable progress** and **set concrete criteria** by which you can measure success.

**A** Achievable

**The goals must be within your reach.** If the goals you set are far beyond your ability, you cannot commit to them. The goals must be a big enough effort for you to believe that you can achieve them and that it requires a real commitment on your part.

**R** Realistic

**Goals should be relevant.** Make sure that each goal is consistent with your other goals and aligns with the goals of the company, your Supervisor or your department.

**T** Time-bound

**Set a timeframe for the goal.** Choosing a deadline for your goal clearly defines the target to be reached. Without a time limit, there is no incentive to get started.

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In this section, you will see the goals entered by your Employee. You can add goals and/or complete your Employee's entry.

- Add a goal for the upcoming year by clicking on **+ Add**.
- Edit a goal for the upcoming year by clicking on the **pen icon**

## 5. Performance Goals for the upcoming year

[+ Add](#)

These goals will be evaluated in the performance review process next year. Indicate your performance goals by clicking on the "add" button at the top right of this section.

### Choose how you would like to create a goal:

- 1 **Create from Scratch**  
Create a goal with a blank goal form.

#### Create Performance Goal :

- Goal name
- Description & measurement
- Weight
- Start date
- Due date

You can also add a comment linked to the goal.

- 2 **Create from Library**  
Choose goals from your goal library and add to your goal plan.

- **Select a goal template** in the library
- Click on **Next**
- Click on the **pen icon**
- **Edit the goal**
- Click on **Next**
- **Save the goal**

[Previous](#) [Save](#) [Cancel](#)

## PART B – DEVELOPMENT REVIEW

### 1. Development Goals of the current year & 2. Development Goals for the upcoming year

These sections are built with your Employee. Ahead of the Performance Review, you can begin to identify **areas for development** linked to the last review and **outline new needs** for the coming year.

- **Modify a development goal** by clicking on the **pen icon**
- Add a new development goal (for the current and/or upcoming year) by clicking on the **+ Add** button.

- Fill in the expected fields.

### 3. Training needs for the upcoming year for the countries using the Training Management System (TMS)

Fill in the training needs directly in the TMS. A tab opens giving you direct access to the TMS.

### 4. Mobility preferences & Personal Considerations

**Only the Employee can complete this section. As a Manager, you will view the content.**

- Click on different **hyperlinks** to fill-in your **aspirations**, then acknowledge their review.
- Click on the **+** to add a **mobility / personal consideration**.

## 5. Work-life Balance Discussion

This section allows the Employee **only to comment on their current situation regarding their work environment.**

You can view your Employee's entry during the Interview (Step 2).

### 5. Work-life Balance Discussion

In this section the Employee is invited to express themselves on their work life balance.

This initiative is part of the Group's desire to develop Quality of Life at Work. Information will be visible for the Manager during the face-to-face interview (step 2). According to employee's feedback, the manager should define an action plan that promotes the employee's quality of life and working conditions.

## Finish preparation

Once the preparation of the form is completed, you can send it to the next step : **Performance Review and Manager Acknowledgement.**

Click on **Send to the next step.**

### 5. Work-life Balance Discussion

In this section the Employee is invited to express themselves on their work life balance.

This initiative is part of the Group's desire to develop Quality of Life at Work. Information will be visible for the Manager during the face-to-face interview (step 2). According to employee's feedback, the manager should define an action plan that promotes the employee's quality of life and working conditions.

Less

Cancel

Save and Close

Send to the next step



At any time, you can **Save and Close** your preparation, allowing you to return to the form preparation. The move to next step by the Manager should not be performed too early. The Employee should be given the maximum amount of time to carry out his preparation.

**Recommendation :** Send to the next step **on the day of the Performance Review.**

## 3

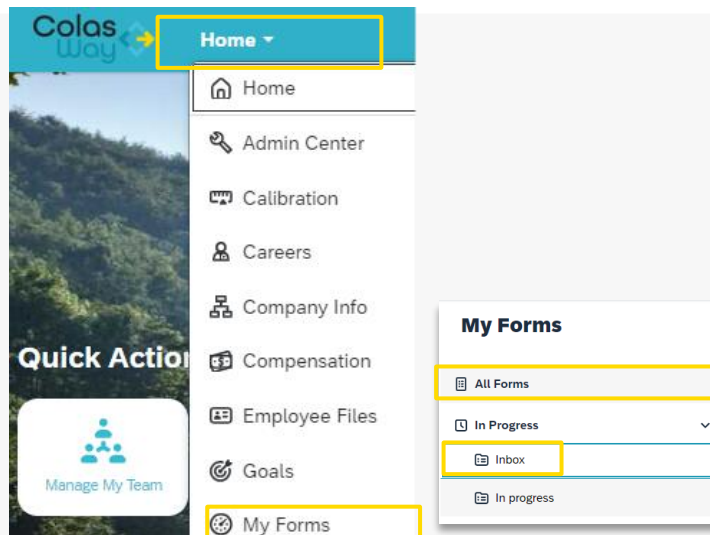
# Filling in the Performance Review form

- *A. Manager Preparation*
- **B. Performance Review and Manager Acknowledgment**
- *C. View a Completed Form*

## A Performance Review

Find the Performance Review form of an Employee in:

- Home
- My Forms
- All forms
- Inbox



The two preparations are visible side by side. Thus, you can discuss with your Employee but **only you, the Manager, can modify the elements they have filled in.** The Employee's preparation remains frozen.

At this step you can **read your Employee's self-assessment.**

Go over all of the form's section with your Employee.

You can **adjust and/or edit comments and ratings** in the dedicated text boxes.

You can also **add, edit or delete a goal** at this step.



## Overall Performance Summary

You must give an overall rating to the Employee for the given period of time, using the indicative calculated rating given by the tool.

- Read the **grade calculated** according to the weightings.
- Give an **overall evaluation** of the Employee's performance.

**6. Overall Performance Summary**

In this section, you will find a calculated indicative evaluation.

Overall evaluation of the Manager: ★★★★☆ Exceeds Expectations Calculated evaluation: 3.725.0

Name	Evaluation	Weight
2. Job Skills	3.43	30.0% of total score
Management Behaviours	3.0 - Meets Expectations	
Ability to communicate transparently and sincerely	4.0 - Exceeds Expectations	
Ability to synthesise	3.0 - Meets Expectations	
Adaptability	3.0 - Meets Expectations	
Analytical mind	3.0 - Meets Expectations	
Construction site management	3.0 - Meets Expectations	
Signalling equipment	5.0 - Outstanding	
3. Leadership Essentials	3.45	20.0% of total score

## Work-life Balance Discussion

- The information will be visible for the Manager during the face-to-face interview (step 2).
- Read the information **provided by the Employee**.
- Define an action plan that promotes the Employee's quality of life and working conditions.

**5. Work-life Balance Discussion**

In this section the Employee is invited to express themselves on their work life balance. This initiative is part of the Group's desire to develop Quality of Life at Work. Information will be visible for the Manager during the face-to-face interview (step 2). According to employee's feedback, the manager should define an action plan that promotes the employee's quality of life and working conditions.

Workload Organisation Within the Company: Satisfactory  
 Workload Allocation Over the Year: Manageable Workload  
 Work life Balance: Good  
 Employee's Comments:  
 Action plan:

B f U | [List] [Link] [Image] | Size ▾

**The calculated indicative rating is only a thinking tool for the Manager. The rating that will be taken into account is the one indicated by the Manager (on a scale from 1 to 5). It is not possible to choose the **Not applicable option** for the Synthesis of the appraisal.**

## B Manager Signature

Once the mandatory fields are completed, you can sign the form and send it to the **Summary and Employee Signature** step.

### Manager's Acknowledgement

**Click here to sign the document.**  \*I certify that this document describes correctly our interview, I check the box and I click on sign to send it to my Employee.

Summary of the Performance Review

Very thorough implication on your projects

Write a comment in the text box.

**Click on Sign to move on to Step 3.**

Cancel Save and Close Send to the previous step Sign

**Click on Send to the previous step to move the form back to the Preparation step.**

Once signed, the form will be sent to your Employee for signature. You can add an additional message.

- Write a **comment** that will be **included in the email** sent to the Employee.
- Click on **Sign** to move on to Step 3.

### Road Map



### Sign

You are about to send this form to the next person(s) specified in the workflow

Forward Form to Alfred Lemke

Email Notification Comments

Please have a final check at your evaluation.

Sign Cancel & Return to Form

## 3

# Filling in the Performance Review form

- *A. Manager Preparation*
- *B. Performance Review and Manager Acknowledgement*
- **C. View a Completed Form**

## A View a Completed Form

### Viewing the completed form:

- From the **Home** drop-down menu, go to **My Forms**.
- The **All Forms** section includes all your forms.
- In the **In Progress** box, you will find the forms that are open and for that you have an action to carry out. They will be in this box until you send them to the next step.
- The **Completed** box includes completed and archived forms.
- The **Form Status** section allows you to view the status of your team's forms (individual or several).

Click on the form to **Open** it.

Title	Employee	Current Step	Date Assigned
USA Annual Performance Review -		Preparation	10/15/2024

Check out the **Manage the forms** document for more information on this topic.