# Youmanage®

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# The Youmanage Framework



**HR Documentation**
**Legislative Compliance**
**Case Management**
**Best Practice Workflow**
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CORE HR
ABSENCE MANAGEMENT
SELF-SERVICE
DISCIPLINE & GRIEVANCE
PERFORMANCE
RECRUITMENT

People Data
Policy Guidance
Process Automation

"The functionality is perfect, intuitive, and built to suit all of our wide-ranging organisational needs, unlike many more expensive products we've tried. Our HR team and employees love every aspect of Youmanage – it's configurable, easy to use, and extremely flexible."

**Paul Stone**
**Group HR Director**
**Uniserve Group**

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# How is Youmanage Different?

In most organisations, there is an enormous desire to improve the HR service being delivered within the business, and there is rarely a shortage of strategic initiatives being identified that HR can assist with in helping a company to move forward.

You wouldn't drown your salespeople in unnecessary, non-revenue generative activities, leaving them little chance to exceed their sales targets. So, let's ensure that HR executives are supported in carrying out their duties so that they too can add value to a company's development plans and bottom line performance.

We all know that having secure, accurate employee data, alongside well-documented and deliverable processes has never been so vital for business. With ever-evolving employment legislation and data compliance requirements, there can no longer be an acceptance of complacency, discrepancy, or inconsistency in how we treat our employees and their associated data.

There is often a lack of focus to devote to HR projects because too much time is consumed by day-to-day administration, managing records, helping managers, and so on.

Youmanage controls risk, reduces administration costs, and increases workforce productivity through intelligent process automation, whilst delivering all of the tools, information, and guidance that a people manager or HR user needs to be effective.

Our business is made up of a combination of professional and commercially-minded people, and we celebrate our ongoing collaboration with our customers to continuously deliver valuable HR software functionality that makes a real difference.

Whilst remaining flexible and responsive to changing needs and to client requirements, we work at a sustainable pace and continuously reflect on and improve our software and its effectiveness.

We welcome you in joining us on our journey to excellence and in helping us to transform HR from being a cost centre into a core strategic asset that adds significant value to organisations everywhere.

**Nick Pye**
**CEO**
**Youmanage HR Ltd**

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# Benefits of Youmanage

## For Human Resources

### FREE UP TIME
Reduce the number of support requests and queries from line managers

### REDUCE RISK
Minimise the chances of getting dragged into (and losing) an Employment Tribunal

### IMPROVE DECISION-MAKING
Easy access to key HR-related metrics and information

### REMOVE FRUSTRATIONS
Ensure that HR procedures are completed consistently and effectively by managers

### MAKE A DIFFERENCE
Supporting you to build a high-performance culture in your organisation

### IMPROVE RESPONSIVENESS
Reduce the workload involved in providing reports to senior managers

### ENHANCE YOUR STANDING
Provide your managers with the HR support they need quickly, easily, and cost-effectively

### SIMPLIFY THE CHALLENGES
Provide your staff with the tools they need to implement new initiatives successfully, e.g. Performance & Development programmes with Competency Frameworks

# Benefits of Youmanage

## SAVE TIME
No need to spend time searching for employee information or guidance on policies, processes, or legal requirements

## REDUCE RISK
Follow structured, step-by-step processes to ensure you don't fall foul of employment law

## GREATER CONFIDENCE
Quick and easy access to best practice guidelines, policy advice, and training materials

## IMPROVE YOUR EFFECTIVENESS
All the tools and information you need to make the right decisions

## REDUCE HASSLE
Prepare for key meetings quickly, easily, and professionally

## PUT YOURSELF IN CONTROL
Automated tracking and reporting on key performance measures

## BOOST TEAM PERFORMANCE
Build development plans, track objectives, and address poor performance issues

# Benefits of Youmanage

## For Employees

### TRANSPARENCY OF DATA
Ensure that employees have full access to their own personal data

### COMMUNICATION
Give employees access to information on company policies and processes

### ACCURACY OF INFORMATION
Allow employees to update their information when changes occur

### REDUCE ADMINISTRATION
Raise absence requests, submit self-certifications, complete timesheets, and self-appraise performance reviews

### IMPROVE ENGAGEMENT
Enables interaction with their performance and development measures

"Youmanage has proved to be a valuable tool in streamlining our HR processes, enabling us to centralise our employee data and HR documentation and improve communications and record-keeping, all in line with the GDPR. The reporting is excellent and easily customisable. The functionality is vast, yet the system is easy to navigate."

**Jenny Bumford**
**Head of HR Operations**
**CityFibre**

# Benefits of Youmanage

## For Executive Team

### ENABLE SUCCESS
Enhance shareholder value by supercharging workforce productivity

### PUT YOURSELF IN CONTROL
Get far greater insight into the performance of your most important asset – your people

### PROTECT YOUR BRAND
Minimise the risk of damage to your organisation's reputation from employee disputes or grievances

### EMPOWER YOUR TEAMS
Give your managers the tools and the information they need to drive your organisation forward

### DELIVER RESULTS
Help to reduce the gap between organisational strategy and execution

### IMPROVE PUBLIC PERCEPTION
Improve your status as a good employer and enhance Investors in People or Corporate Social Responsibility initiatives

### MINIMISE COST
Subscription-based service with no high IT set-up or maintenance costs

### BUILD A VALUABLE ASSET
Raise the value of your organisation's human capital

# Core HR

The Core HR module is a mandatory Youmanage component, providing the basis for a people-centric data management system, assisting both HR professionals and people managers in the management of complex HR workflow processes, maximising the effectiveness and the competence of the workforce.

Youmanage has been designed to generate and record data belonging to a sequence of actionable events occurring over time, venturing into full case management, ensuring compliance with UK-led employment legislation.

Based upon a set of event-driven workflow processes and rules that are linked to HR best practice, Youmanage outputs data and content to users at each particular stage or event within any workflow process, therefore ensuring that people management activities are always delivered in a consistent and compliant way.

## Key Benefits

- Improves the management of vital employee information through a single, integrated employee database to underpin and streamline all key HR processes

- Equips line managers to take greater accountability for day-to-day people management issues

- Reduces HR administration and support costs and improves overall efficiency and accuracy

- Helps to ensure compliance with relevant employment legislation and standards

- Raises general management standards, thereby improving the competence, motivation, and productivity of your workforce

- Enables comprehensive information relating to employees to be stored in a single, easily-accessible system

- Reduces the time spent on information gathering

- Ensures information is more usable and up-to-date as information can be updated in real-time by a range of users, not just the HR department

- Provides a far richer picture of the workforce than a conventional HR database by capturing vital information related to productivity and as a by-product of supporting people managers in their day-to-day activities

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# Key Features

- Stores comprehensive information relating to your employees (including Employment History, Contract Details, Salary & Benefits, Diversity & Equality, Personal Information, Documents, Company Assets, Absence History, etc.)

- Employee details can be easily entered, viewed, and edited by any manager, senior manager, or HR user with the necessary permissions, at any time, from any location, and from any device

- Custom Fields can be defined by the client administrator and applied to all employee records, enabling you to capture the information that is most valuable to your organisation

- File Notes can be added to an employee's record by any user and filed against client-defined categories, producing a far richer picture of each employee's performance and supporting matrix management

- All key information relating to an individual employee is easily available to users via the unique Employee Summary Page

- A wide range of pre-defined reports are available, and users can also create their own custom reports based on a wide range of filtering options – reports can be easily exported to Excel for further analysis, if required

- Scheduled Reports can be run automatically and sent to you or any other recipient at a specified time, rather than having to run them manually

- Senior managers have easy access to key dashboard metrics via their home page and can drill-down for more detailed information



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## MODULES
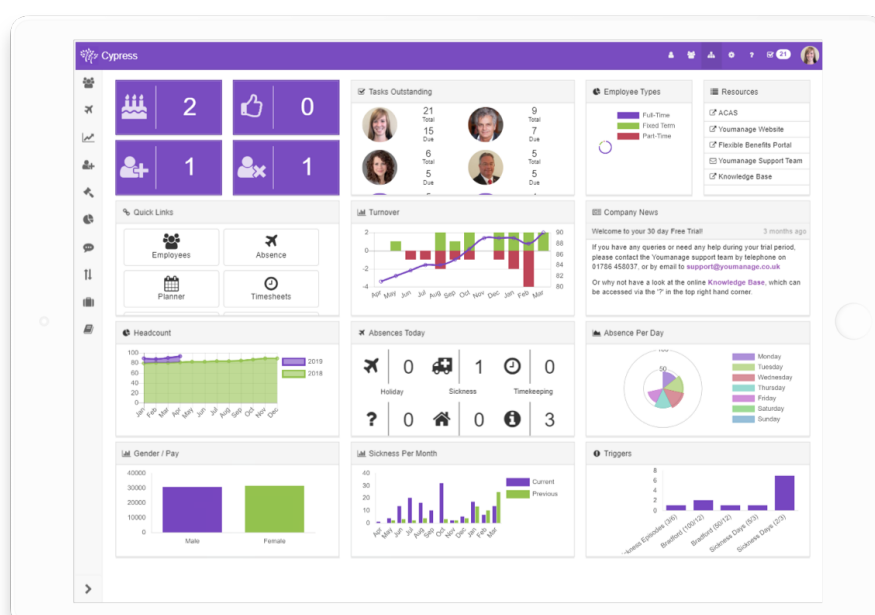
**CORE**

**ABSENCE**

**SELF-SERVICE**

**DISCIPLINARY**

**PERFORMANCE**

**RECRUITMENT**

# Key Features

- Company Documents can be stored in folders for employees to access, such as policies, procedures, standard templates, and forms – multiple versions of a document can be stored in Youmanage, but employees will only see the latest version

- Company Documents can be restricted to groups of employees and those that have visibility of the document can receive a notification asking them to read it and, if necessary, confirm they have understood it

- Employment Checks enable you to record Right to Work information for employees, including the ability to store copies of documentation associated with the check itself, alongside the ability to define custom checks

- Permission Sets are a powerful way to let the system know what a user is allowed to see and do when accessing or viewing employee records – you can restrict a user from viewing employee-sensitive data, which is crucial for GDPR compliance, i.e. medical conditions, dates of birth, etc., or stop them from carrying out certain processes, such as adding a new employee, and each group of manager/HR users can have a different set of permissions, allowing for greater flexibility for your users

- Default values can be set when adding a new employee, making it easier and quicker to create the record

- Starter and leaver checklists can be defined to ensure that the correct process is being followed when onboarding a new employee or when an employee is leaving, and the checklists can be configured for each job title

- Various Probation Periods can be defined which will automatically notify the user that an employee's probation is coming to an end, and the Probation Process can be split into interim periods, allowing the line manager to review the employee's progress at regular intervals

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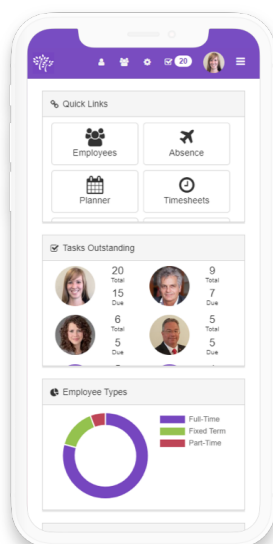**SELF-SERVICE**

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# Key Features

- Automatic email notifications can be configured, ensuring the correct people are notified of events and/or tasks that need to be completed – the notification reminder periods can also be amended to ensure the relevant people are informed at the appropriate times

- The Employee Directory can be configured to display a relevant list of employees in your organisation along with their work contact details, making it easier for employees to locate and contact colleagues

- Import key employee data such as bonus information, salary changes, etc., using our standard import templates

- Share data with other third party systems, such as a payroll system, with our data export templates

- You can automatically import documents from secure locations to employee records in Youmanage, i.e. payslips from a payroll provider, training documents from an LMS system, etc.

- Client-specific password policies can be defined and will include password complexity, password history, lockout policy, and Two-Factor Authentication

- A Data Removal framework is available where each client can define their own data policy, which can automatically delete data that you no longer want or need to retain

- Timesheets can be used by employees to record how many hours per day/week they've worked and can be used to accrue an employee's entitlement, if required

- Tasks and their associated email notifications ensure the in-built processes are dealt with at the relevant time

- Fully-configurable letter and email templates are available as part of integrated workflow processes, allowing you to tailor them to your needs

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# Key Features

- Multiple Shared Calendars can be created to ensure that when events are created in Youmanage, such as holidays, absence, and performance review meetings, and a copy of these are automatically exported to an Outlook or Google calendar, which can be shared with employees and/or managers

- Linked Calendars allow events created in Youmanage, such as holidays, absence, and performance reviews, to be written to the employee or manager's own Outlook or Google calendar

- Flexible Working Requests can be recorded and managed within Youmanage, where all data input, process, and notifications have been developed and are in line with the ACAS Code of Practice

- Guidance content and related documentation is provided to users at the point of need during a workflow process, which helps the user understand the process they're undertaking

- Employee Surveys can be created and shared with all or a group of employees to encourage engagement and feedback

- For each job title, a job profile can be created to include a job description, linked competencies, starter/leaver checklists, interview templates, and generic objectives

- A Competency Framework can be created and aligned to an organisation's core values which helps employees to develop their skills and knowledge



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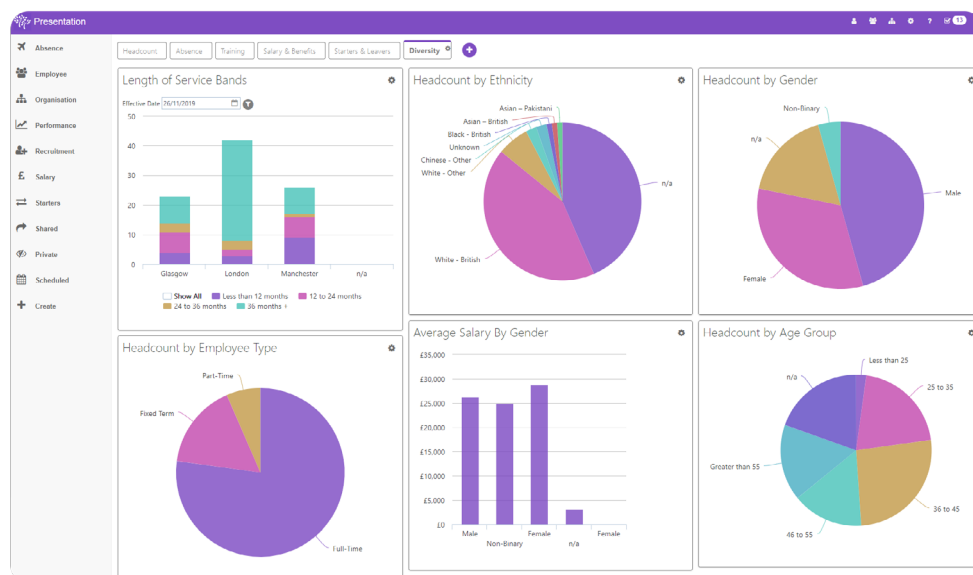CORE

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# Reporting & Analytics (within Core HR)

HR is being accused of not doing enough to assist with the commercial growth of the companies they work for. And many of them live with criticisms being levelled against them for not understanding what's being asked of them, or how their actions 'could' impact the bottom line, made more possible if they were more proactive and aligned themselves better with the company's strategic and financial goals.

According to a recent survey, 77% of HR professionals are unable to determine how their company's workforce potential is affecting the bottom line, while 44% use objective data regarding performance to guide business decisions.

So, what might be the thought process for businesses and HR professionals in using data to support the achievement of business objectives and to provide HR with the insight to initiate change and add significant value?

## Key Benefits

- Clearly communicate business objectives throughout the organisation, allowing users to see progress towards company goals, keeping everyone focused and informed with real-time data

- Publish information to ensure that users will only see the information that's important to them in an easily-digestible format

- Business Intelligence solution providing HR professionals, people managers, and business leaders with the ability to bring about positive change and to help make informed decisions

- Enable decision-makers to understand data, spot patterns between numbers, and identify trends, as well as the reasons behind them

- Designed and developed for HR and people managers who do not necessarily possess IT skills and who want to use business data to guide their actions

- Deliver critical information when needed most and where users can act on it

- Dramatically speed up commercial discussions and decision making

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# Key Features

- Configurable dashboards allows each user to choose which reports are displayed when viewing the Reporting landing page

- Youmanage has nearly 100 standard reports for people managers and HR users to run, as and when required

- You can create your own custom reports using the easy-to-follow Report Builder, allowing greater flexibility in how you wish the data to be displayed

- Data-driven reports will help predict future trends and produce actionable insights

- Custom reports can be saved to a private folder or, if suitable, shared with other users

- The Reporting module takes account of a user's permission set to ensure they do not see information relating to employees they don't have access to

- Various chart types are available which can be used when displaying a lot of information in an easy-to-understand format

- Report results can be exported to Excel, PDF, or CSV format, if necessary

- Reports can be scheduled to run automatically on a regular basis and the output sent to an individual or group of users via email



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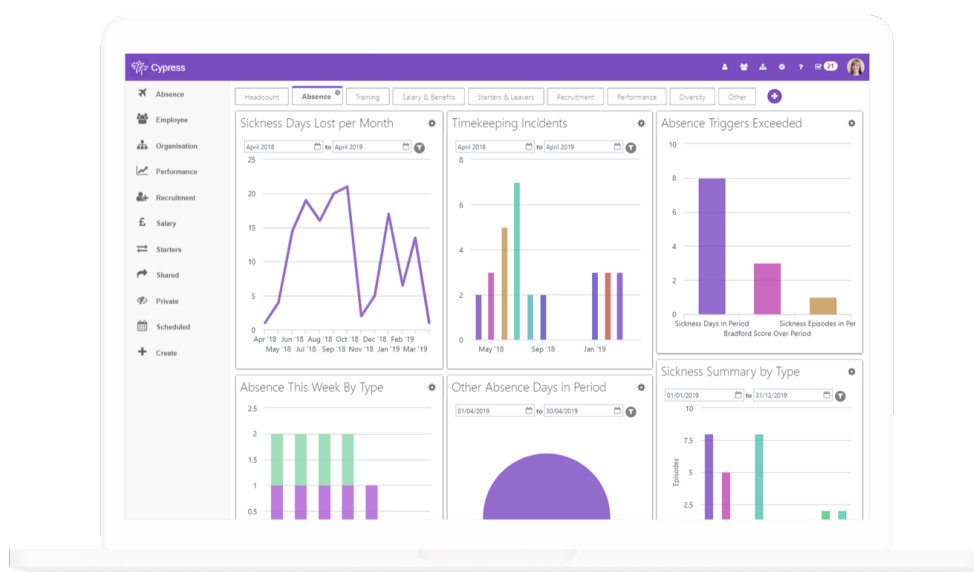
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# Absence & Holidays

Unchecked absenteeism can have a significant impact on the productivity and performance of an organisation – it's not only the lost days that cost a business, it's also the negative impact on customer service, the delays in project timescales, and the damaging effect on staff morale that results from some people being perceived to be 'getting away with it'.

Yet many organisations have no understanding of what absenteeism costs them as they have no fully-effective system for recording or managing multiple absence types and neither do they have a robust and feature-rich way of reporting it.

The Youmanage Absence & Holidays module offers extensive functionality to effectively record, track, analyse, and report on absences and holidays.

## Key Benefits

- Reduces absence levels by ensuring absence problems are identified and remedied

- Ensures correct processes are followed to comply with HR policies and employment regulations

- Improves customer service and the delivery of key projects by enabling managers to easily plan for holidays and other scheduled absences

- Dashboard reporting and email alerts enable problems to be identified quickly and remedial action to be put in place

- Helps to ensure that possible issues with individual employees (e.g. stress) are identified and dealt with promptly

- Reduces the administration burden of calculating entitlement on a year-by-year basis

- Ensures the correct number of days/hours are calculated when an employee books an absence or holiday

# Key Features

- Working Calendars can be set up and used to automatically calculate an employee's Full Time Equivalent (FTE), which is used in the pro-rating of entitlement – the calendars can consist of simple one-week patterns, or multiple patterns, if an employee works a shift pattern, for example

- An organisation's full-time hours are set and used to calculate FTE, however, the full-time hours can be set against each Job Title or an individual Company, to allow clients who have varying full-time hours to have the employee's entitlements calculated correctly

- If an employee changes their working pattern during the year, Youmanage can automatically pro-rate the holiday entitlement, based on the various changes to their hours

- Multiple Entitlement Profiles can be created to establish the rules the system will use to calculate annual leave entitlement, which can include Carry Over, Pro-Rating and Length of Service, if required

- Entitlement and the booking of absence can be calculated in either days or hours depending on the preference of the employee/company

- The ability to create multiple Entitlement Years is available for companies who may have employees TUPE'd over, or for employees where their entitlement year may start on different dates

- Entitlement profiles can be configured to start on an employee's work anniversary

- Whether Carry Over is created automatically or manually, an associated expiry period can be set up to ensure that it is used within a specific timeframe, e.g. two months

- Youmanage will pro-rate the Bank Holidays an employee is entitled to, based on FTE, Start and/or Leave date, and their entitlement adjusted as necessary, if required

- Bank Holidays can be pro-rated for new starters/leavers, either over the entitlement year or for the period of employment

- Multiple Bank Holiday profiles can be set up if there are employees who work in different geographical locations, or perhaps where some employees may benefit from different holiday entitlement rules

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# Key Features

- Multiple Sick Pay Schemes can be configured, based on either a fixed calendar year or a rolling 12 month period – the schemes are used to monitor when an employee takes a preset number of days, which can be used for reducing someone's pay, or moving the employee onto SSP

- Length of Service rules can be applied to Sick Pay Schemes to ensure employees with longer service are given an additional allowance

- A graphical Absence Planner displays employee absences, making it easier to see who is off and when – the planner can also display patterns of absence for any employee via the individual employee view

- Different access permissions can be set up for the Absence Planner to ensure the user looking at it does not have visibility of information that may be deemed sensitive

- Bradford Factor is calculated by default and each client can choose whether to only include sickness absences in the calculation or choose to include some other absence types, e.g. Unauthorised Leave

- Multiple absence triggers can be defined to monitor each employee's absence levels, i.e. number of days sickness, Bradford Factor, etc.

- Absence notifications can be configured to send to the relevant people at the required time

- Built-in processes ensure consistency and best practice when recording absences for employees, making it easier for someone to complete an absence when a line manager isn't available

- In-app guidance and related content is available at each stage in an absence process, giving the user the necessary information at the point of need

- Each type of absence can have a client-configurable list of reasons that help to define the specific cause of why employees take absence

- Self-approval of absences allow employees to book their own absence without the need for their line manager to authorise it – this can be for all employees or only select groups of employees, e.g. Directors, Senior Management, etc.

- Cancellation of absences by an employee can require approval by the line manager to ensure that cover has not been arranged when the employee is absent or that another employee's absence has been declined due to multiple employees being absent at the same time

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# Key Features

- Access to certain absence types can be restricted to ensure that sensitive information is not displayed to those that don't need the information

- Reporting can be used to show trends in absence, highlighting problem areas by groups of employees, if required

- For employees who don't have set hours they work, an entitlement balance can be accrued automatically through the submission of timesheets

- Managers can easily record Time Off In Lieu (TOIL) for each employee, which could expire depending on client-defined rules

- Negative TOIL – employees can take time off work and make the time up at a later date, thus allowing for a negative balance

- Overtime worked by an employee can be recorded by a manager to capture any payments due to an employee

- If timesheets are being used, any hours submitted over the employee's contracted hours can be transferred automatically to a TOIL balance which the employee can request via Self Service, if required

- Managers can Group Allocate absences for any number of employees, which can be used, for example, for company away days, shutdowns, CSR events, or festive parties
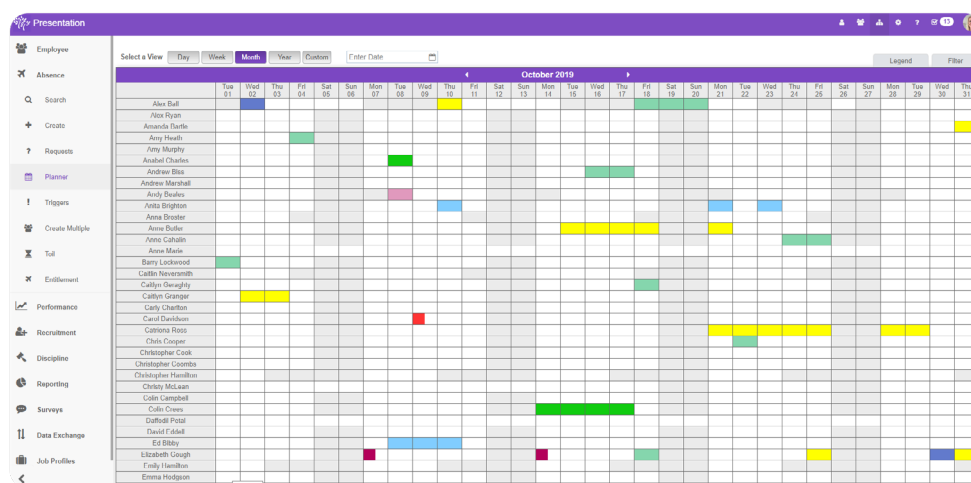


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# Self-Service

The Employee Self-Service module empowers employees by providing them with access to improved information about themselves, and reduces administration costs by enabling employees to manage their own details in a controlled manner.

Users are able to update their own personal details, raise holiday and other absence requests (including TOIL and Overtime), request to work flexibly, view their own objectives, career goals and development plans, and view company documents.

## Key Benefits

- Automates the process of keeping personal employee information up-to-date, reducing administration costs and freeing up HR to focus on activities that add greater value

- Reduces administration costs by enabling employees to update their personal details, raise holiday requests, and submit Self Certificates directly on the system

- Improves accuracy of information by enabling employees to have easy visibility of their personal information stored on the employee database

- Improves the engagement of employees in performance management and development processes by giving them easy access to their own details and enabling them to add comments to their own record

- Gives employees easier access to information on company policies, forms, templates, and procedures

- Saves managers' time processing holiday requests, if allowing groups of employees the ability to self-authorise their own leave

- Enhances your employee engagement efforts by dramatically increasing the empowerment of workers

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# Key Features

- Employees can access Youmanage from any device with a web browser and internet access, making it ideal for field-based or home workers

- Employees can view and edit personal information (e.g. contact details, next of kin) stored on Youmanage via their own unique login credentials, which increases engagement levels

- Client administrators can define whether employees have access to view and update certain information (e.g. payroll details)

- Employees can view other information stored as part of their record (e.g. objectives, development plans, job descriptions, and competencies)

- Managers and HR users can be automatically notified any time an employee edits a piece of data on the system so that there is full visibility and control

- Employees can view their current holiday entitlement and absence records

- Employees can raise holiday and absence requests and be automatically notified of the manager's decision

- If necessary, self-approval of absence requests can be defined, where groups of employees can book their own absence directly

- Time Off In Lieu and Overtime, if necessary, can be requested and sent to the manager for approval

- Employees can complete their own self certification following a period of sickness

- Employees can enter their own 'file notes' and file them under relevant categories (e.g. against an objective or a career goal), enabling them to play an active part in the ongoing performance management process

- Timesheet recording is available to all employees or groups of employees to help manage the amount of time an employee works

- Employees can clock in/out, rather than manually enter their time on timesheets, to help manage flexible working arrangements as well as improve the accuracy of employees' time at work

- Flexible working requests can be made direct from self-service and managed online

- Following a period of sickness, the employee can complete their own self-certification within Youmanage, eliminating the need to complete paper-based forms

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# Key Features

- Notifications/tasks are used to alert the employee that an action has been completed for them, such as a holiday request approval, or when you require the employee to do something, like read a document

- The Employee Directory can be published to Self-Service users to enable them to view their team, department, or the whole organisation, making it easier for the employee to contact the correct people

- The Absence Planner is available to allow employees to check conflicts of absence prior to requesting their own absence

- Employees are able to view documents attached to their record where access has been given

- Company documents can be made available to Self-Service users where, if required, the employee must confirm they have read and understood required documentation

- Company news is available on the Self-Service landing page, giving employees information on events or news happening within the company

- Resource links can be created and made available, making it easier to access other websites such as a benefits platform or payroll software

- Employees have access to 1-2-1 notes, and they can view and update their performance management records, including completing a self-appraisal prior to a review meeting, as well as being able to update objectives, development needs, and career goals



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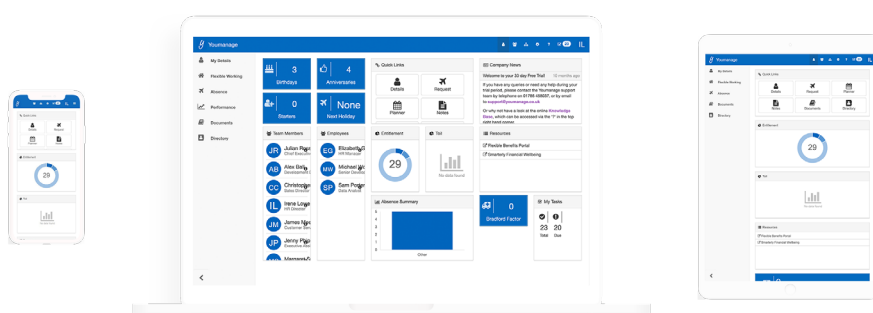CORE

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# Disciplinary & Grievance

Disciplinary & grievance issues may occur infrequently, but when they do, they can have highly damaging consequences if not handled effectively. As well as the potential cost of a negative tribunal award, there is also the cost of management time spent responding to a Tribunal claim, the damage to a Company's reputation and the negative impact on staff morale and motivation, all of which should be avoided.

Even where issues do not result in an Employment Tribunal, poor handling of performance or disciplinary problems or employee grievances can have a significant cost to the organisation in terms of increased staff turnover, loss of employee motivation and focus and even malicious actions on the part of employees which can damage an organisation's clients and its reputations.

The Youmanage Discipline & Grievance module helps to ensure that issues that may arise are handled effectively, fairly, consistently and in line with relevant employment legislation.

## Key Benefits

- Minimises the risks of losing a tribunal by ensuring correct processes are followed and provides a full audit trail of all meetings, documents, and notes

- Publish relevant guidance materials and other related content to assist people managers

- Ensures compliance with internal policies and employment regulations by providing step-by-step processes for both HR professionals and managers to follow

- Enables investigations and suspensions to be tracked and findings to be recorded

- Gives managers the confidence to handle difficult situations effectively, consistently, and fairly by providing guidance notes and meeting templates specific to the type of issue they are addressing

- Reduces the time managers and HR professionals spend administering grievance and disciplinary processes

- Equip people managers to take the relevant actions and deal with poor performers more effectively and more promptly

- Saves time and ensures compliance with best practice by enabling easy production of standard letters – i.e. Invite to Disciplinary meeting and Notification of Decision, based on client-editable templates

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# Key Features

- Youmanage provides easy-to-follow, step-by-step processes for handling disciplinary and grievance issues

- Advice and guidance are provided to users at each step of the way, making it easier for managers and HR users to handle situations correctly, confidently, and with minimum hassle

- A full set of pre-populated Disciplinary & Grievance letter templates are provided and can be edited to meet your own requirements

- All meeting dates, letters, and notes are recorded and tracked on the system, providing a full audit trail in the event of an Employment Tribunal situation

- Managers can access and print off meeting templates for disciplinary hearings, including a suggested agenda and guidance notes, ensuring a consistent approach

- The findings of disciplinary investigations or ad-hoc issues can be easily recorded – these provide a sound basis for later disciplinary action, if required

- Managers will receive automatic reminders of key dates and actions (e.g. sending a letter following a Disciplinary Hearing), ensuring that important milestones are not missed

- Follow-up review meetings can be arranged, ensuring that any actions agreed at the original meeting are being met or, if not, the ability to move the employee to the next stage in the process

- Accompanying managers can be asked to sign off the outcome of the meeting, ensuring that nothing has been overlooked

- Senior managers and HR users can easily view summary metrics or drill down into the detail of an individual investigation, disciplinary, or grievance process

- Configurable categories and channels with associated templates that are available at the required time

- Ensure an investigation is carried out in a reasonable time frame, where the employee may be suspended, by setting your own suspension period

- You can easily move from investigation into the disciplinary process without losing any information

- For any employees who leave the organisation, Youmanage can automatically delete the associated Discipline & Grievance actions after a specified time

- Permission Sets can be used to ensure the correct people have access to the relevant stages of the disciplinary processes

- Reporting is available to allow you to analyse problem areas, for example by departments, categories, and more

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# Performance & Development

Effective Performance Management processes are a key part of creating a high-performing organisation. Yet often 'performance management' is a once-a-year event rather than a continuous process. Objectives & Development Plans are written up on paper forms, filed in a drawer, and forgotten about until the next review comes around.

The Youmanage Performance & Development module can help organisations build a high performing culture; where employees work to clearly defined objectives, where each employee's potential is recognised and maximised, and where the whole organisation is aligned behind a consistent set of goals. We can also help to simplify the administration of review processes and improve the management of employee performance information.

There are four main elements of the Managing Performance module:

- Managing By Objective
- Managing Employee Development
- Managing Performance Reviews
- Managing 1-2-1s

The module can also be complemented by Youmanage's 'out-of-the-box' Competency Framework. This enables organisations to more easily implement a competency-based approach to performance management and development.

## Key Benefits

- Produces a more focused workforce by ensuring that employees are working to well-defined, SMART objectives that are aligned with company objectives
- Improves the skillbase of the organisation by enabling individual Development Plans to be easily set-up and managed for each employee based on identified development needs and role-based competency requirements
- Improves the organisation's ability to execute on plans by ensuring that there is proper focus on meeting key milestones and target dates
- Reduces the administrative burden associated with setting up and managing Performance Review Rounds
- Helps foster a high-performance culture by ensuring Performance Management is a year-round process rather than a once-a-year event
- Saves manager time by enabling them to prepare for key meetings quickly and easily
- Improves line manager effectiveness by ensuring that they are equipped with all relevant information and guidance for key meetings

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# Managing By Objectives

- Managers can set up, track, and update objectives for their team members on an ongoing basis, and each objective consists of:

  - A description of the objective (this will normally be a broad statement of what the employee is expected to achieve);

  - One or more Measures (these are the easily measurable criteria that will be used to determine whether or not the employee has achieved their objective);

  - A Target Completion Date for each Measure (this is the date that the measure should be achieved by); and

  - A Completion Rating for each Measure (this allows the manager/ employee to record progress against the target in percentage terms)

- Comments can be added by the manager or employee at any time in relation to an objective, either from the Updating an Objective screen or from the Adding a General File Note page for that employee, or via the Self-Service module

- Objectives can be one of two types: Generic (defined within the Job Profile) or Individual (specific to that employee)

- Generic Objectives can be defined for a Job Profile by the owner of the Job Profile – these objectives will then be copied to all employees with that Job Profile and can also be automatically copied to new employees who are assigned to that Job Profile

- Objectives can be linked to Company Goals or Sub Goals in the system, e.g. Department, Location, Division, etc., to improve the alignment of individual activity with corporate strategy

- Managers can select whether to receive email reminders of the Completion Dates for Objective, and a summary of overdue or imminent objectives for the manager's team will be displayed on the Managing Performance landing page

- Managers can view a summary table showing all objectives set for their team members and can filter this information by Employee, Objective Status (closed/open), Completion Date, and Completion Rating

- A weighting can be given to each objective which is then used to calculate an overall completion score at the end of a review

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# Managing Employee Development

- Managers can set up, track, and update Development Plans for their team members on an ongoing basis, and each Development Plan entry may consist of:

  - The 'Development Need' that has been identified for that individual. This may relate to a Competency defined in the Job Profile for that employee's role;

  - One or more 'Development Activities' that have been agreed in order to address the Development Need; and

  - A target Completion Date for each Development Activity

- Comments can be added by the manager at any time in relation to a Development Need – either from the Updating a Development Plan screen or from the Adding a General File Note page for that employee

- Managers can select whether to receive email reminders of the Completion Dates for Development Activities, and a summary of overdue or imminent activities for the manager's team will be displayed on the 'Managing Performance' landing page

- Managers can also set up, track, and update Career Goals for their team members

- If Competencies have been defined for an employee's Job Role, then the manager will be able to view a list of the Competencies, along with the level required for the Job Role and the last rating achieved by the employee for that Competency

- Managers can view a summary table showing all development needs and career goals set for their team members and can filter this information by Employee, Status (closed/open), Completion Date, and Completion Rating

# Managing Performance Reviews Including 360 Feedback

- Client administrators can set up Review Rounds for their organisation – for each individual Review Round, the administrator can define the employee groups to be included in the review, the period the review applies to, the period in which the reviews should be completed, or whether the review is based on the employee's anniversary date, the Review Form Template to be used, and the sign-off process required for each completed review

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- Clients can set up multiple Review Form Templates to be used in Review Rounds, and for each Review Form Template the administrator can define:

  - Which elements are to be included in the Review (e.g. Objectives, Competencies, Development Plans, and/or Summary Ratings);

  - Which rating scale is to be used for the Summary Rating; and

  - Any custom fields required to be included on the Review Form

- Client Administrators can keep track of how many reviews have been completed and can choose to send reminder emails to all managers who have not yet completed the required Review

- Managers will be alerted to Performance Reviews required for their team members via email and on their homepage

- 360 Reviews can be requested from an employee's colleagues, direct reports, and senior managers, to provide feedback which can offer a broad perspective, helping to make performance management a more balanced process

- Managers can prepare for reviews by booking review meeting dates, printing off Review forms pre-populated with all items to be reviewed, and/or emailing the pre-populated Review Forms to the individual employees

- When a manager books an employee's review meeting, an email can be automatically sent asking the employee to complete their own Self-Appraisal online – the employee can then add their own comments to the review items, Objectives, Development Plans, etc.

- Managers can also print off Manager Support Packs prior to review meetings, and as well as all the information from the Review Form, the Support Pack will also include details of any previous updates or comments made in relation to each Review item (e.g. Objective, Development Plan, etc.) – the manager can also select to include additional useful information in the Support Pack such as General File Notes, Absence History, Job Description, Disciplinary Record, etc.

**Performance Reviews**

**Review Status**

Review Round: Annual Reviews - 2019 Selected: All Employees. Dates: 01 Jan 19 to 31 Jan 19 Status:Open

| Employee Name | Next Anniversary | Reviewing Manager Name | Review Meeting Date | Review Form | Employee Self appraisal | Manager Support Pack | Complete Review | Employee Sign Off | Manager Sign Off | |
|---|---|---|---|---|---|---|---|---|---|---|
| Alex Ball | | Irene Lowe | 22 Oct 19 | | 07 Oct 19 | ⊜ | 07 Oct 19 | 07 Oct 19 | 28 Nov 19 | ◀ |
| Amanda Bartle | | Irene Lowe | 23 Oct 19 | Send Now | 28 Nov 19 | | Pending | Not ready | Not ready | |
| Andrew Biss | | | Book Now | | | | | | | |
| Andy Beales | | Irene Lowe | 07 Jan 19 | | Incomplete | ⊜ | 23 Oct 19 | Requested | Not ready | ◀ |
| Anita Brighton | | Irene Lowe | 27 Nov 19 | Send Now | 22 Oct 19 | Pending | Pending | Not ready | Not ready | |
| Anna Droster | | | Book Now | | | | | | | |
| Anne Butler | | | Book Now | | | | | | | |
| Anne Cahalin | | Irene Lowe | 28 Nov 19 | Send Now | 23 Oct 19 | Pending | Pending | Not ready | Not ready | |
| Carly Charlton | | | Book Now | | | | | | | |
| Christopher Cook | | Irene Lowe | 05 Dec 19 | Send Now | Incomplete | Awaiting SA | Not yet due | Not ready | Not ready | |
| Christopher Coombs | | | Book Now | | | | | | | |
| Chris Cooper | | Irene Lowe | 07 Jan 19 | 07 Jan 19 | Incomplete | ⊜ | 23 Oct 19 | Requested | Not ready | ◀ |
| Colin Crees | | | Book Now | | | | | | | |
| David Eddell | | | Book Now | | | | | | | |
| Elizabeth Gough | | Irene Lowe | 24 Jan 19 | 07 Jan 19 | 07 Jan 19 | ⊜ | 30 Apr 19 | 22 Oct 19 | Not ready | ◀ |
| Emma Hodgson | | Irene Lowe | Book Now | | Incomplete | Awaiting SA | | Not ready | Not ready | |
| Emma Holmes | | Irene Lowe | 24 Oct 19 | Send Now | 22 Oct 19 | ⊜ | Pending | Not ready | Not ready | |
| Fiona Hudson | | | Book Now | | | | | | | |
| Frances Hughes | | | Book Now | | | | | | | |
| Frank Kenny | | | Book Now | | | | | | | |
| Jillian Lane | | | Book Now | | | | | | | |

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- Managers can easily record the output from their Review meetings on the system, and the output can include Review Comments against each item, updates to the individual items (e.g. changed Completion Rating or Target Date), changing the status of an item to Closed, and adding a new Objective or Development Need

- If Competency Review is included as part of the Review Round, then the manager will automatically be presented with the relevant competencies to be reviewed for each employee (based on the Job Profile) and guidance on how to assess the employee's performance against each individual competency

- Managers can close and sign-off a review online and if employee and/ or senior manager sign-off has been defined as part of the process for that Review Round, the manager can submit the completed reviews for sign-off

- The employee and/or senior manager will be alerted by email if sign-off is required and they can view the completed Review Form via a secure link, add their comments, and sign-off the review electronically

# Managing 1-2-1s

- Employees can access 1-2-1 notes following meetings for full visibility, which enhances transparency between employees and managers, resulting in better employee engagement and greater trust

- Managers can record the dates of 1-2-1 meetings with their team members and can send email notifications to employees of the meeting dates

- Managers can easily prepare for 1-2-1 meetings by producing and printing 1-2-1 note sheets – the 1-2-1 notes can contain a range of information, as selected by the manager, including open Objectives or Development Needs, Competencies, Absence record, Disciplinary records, File Notes, etc.

**Managing 1-2-1 Meetings**

| Employee | 1-2-1 Reviews History | Completed 1-2-1s in last 12 months | Date of last 1-2-1 | Date of next 1-2-1 | |
|---|---|---|---|---|---|
| Alex Ball | ✓ | 1 | 09 Oct 19 | Book Now | |
| Alex Ryan | ✓ | 1 | 07 Oct 19 | Book Now | |
| Amanda Bartle | ✓ | 0 | n/a | Book Now | |
| Amy Heath | ✓ | 0 | n/a | Book Now | |
| Amy Murphy | ✓ | 1 | 30 Apr 19 | 10 Dec 19 4:00 PM | Prepare 1-2-1 Notes |
| Anabel Charles | ✓ | 2 | 28 Nov 19 | Book Now | |
| Andrew Biss | ✓ | 0 | n/a | Book Now | |
| Andrew Marshall | ✓ | 0 | n/a | Book Now | |
| Andy Beales | ✓ | 0 | n/a | Book Now | |
| Anita Brighton | ✓ | 2 | 23 Oct 19 | Book Now | |
| Anna Broster | ✓ | 2 | 07 Apr 19 | 02 Dec 19 11:00 AM | Prepare 1-2-1 Notes |
| Anne Butler | ✓ | 0 | n/a | Book Now | |
| Anne Cahalin | ✓ | 0 | n/a | Book Now | |

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# Recruitment & Interviewing

If the quality of people you recruit is poor, then you are always going to be fighting an uphill battle to build a high-performing business.

Despite the wealth of evidence around the benefits of a structured, criteria-based approach to interviewing, many managers are still content to rely on gut feeling and instinct when recruiting. This approach is even more risky now with the need to ensure compliance with diversity and equality legislation.

The Youmanage Recruitment & Interviewing module helps to ensure that your recruiting managers identify and attract the very best candidates for vacancies whilst staying on the right side of all relevant employment legislation.

## Key Benefits

- Ensures consistency of approach across different interviewers and different recruitment processes

- Automates the administration of many aspects of the recruitment process, reducing costs and improving data accuracy

- Enables a searchable database to be built of potential candidates

- Improves the quality of recruitment by helping to ensure successful candidates have the skills, knowledge, competencies, and experience required to be successful in the role

- Minimises the likelihood of challenges or claims from unsuccessful candidates by making it easier to demonstrate objectivity and fairness in decision-making

- Makes it easier provide feedback to candidates after interviews

- Captures valuable information which can inform development planning for successful candidates

- Reduces interview preparation time for managers and HR users

- Improves access to information for the different parties involved in a recruitment process

- Creates a more positive perception among external candidates by ensuring that managers are well-prepared for interviews

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# Key Features

- The Recruitment & Interviewing module supports a variety of configurable interview formats and multiple interview rounds

- Multiple interview rounds can be defined per job vacancy, e.g. telephone, face-to-face, testing, etc.

- Comprehensive candidate database functionality enables you to build a valuable source of information on potential employees

- Interview Templates can be defined for each job role and based on the Job Profile or Competency Framework and include suggested questions, criteria weightings, etc. Pre-formatted Interview Templates in Microsoft Word format can be easily accessed and printed by recruiting managers, saving them preparation time and improving the consistency and effectiveness of interviews

- Managers are supported with comprehensive guidance on interviewing techniques and relevant diversity and equality legislation

- Multiple users can share information and tasks during a recruitment process, improving collaboration and reducing costs

- Interview notes, scores, or assessment results can be easily captured, providing an auditable record of decisions in the event of a challenge by an unsuccessful candidate

- Once decisions have been made, users can easily send Offer and Rejection letters or emails for each candidate, based on client-editable templates

- Offers can be tracked and closed, and information captured during the recruitment process will be automatically transferred to the employee database for successful candidates

- Automatically feeds into the New Starter process, enabling employment checks and induction tasks to be automatically tracked

- Standard and Custom reports can be produced to analyse recruitment metrics, e.g. quality of hire, time to fill a vacancy, etc.

- Data retention rules can be defined to guarantee candidate information is not held for longer than required, ensuring compliance with data protection laws

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# How Youmanage Protects Your Data

## One Centralised System

Holding all your data in Youmanage eliminates information being passed from one manager to the next in a disorganised fashion that helps no one. Youmanage can be configured in such a way as to do all of this for you. In addition, having a single all-in-one system means:

- Consistency of shared data across the entire company

- Minimised risk of human error or data discrepancies

- Reduced threat risk associated with storing employee data

## Security Features

Youmanage has an impressive arsenal of security features to protect your data. These features give you an even greater level of control over your system and ensures your employee data is completely secure. Some key in-app features include:

- Two Factor Authentication

- Password history and expiry

- Complex password rules

## Permission Sets

Youmanage is highly configurable, which means that you can tailor the system to suit your individual business needs. You can decide what your HR team, managers, and employees can see and edit in your system. For example, you might want your HR team to see employee salary details, but for this information to be inaccessible by managers. This allows you to provide your people managers with only the information they have a legitimate need to see, which is a significant requirement of the GDPR. Key features of Permission Sets include:

- Unlimited Permission Sets

- Role-based permissions for different types of HR users and managers

- Restrictions to individual data fields and workflow processes

## Data Retention, Deletion, and Anonymisation

Youmanage contains a groundbreaking Data Retention Framework, giving clients the tools they need to determine and control what data is retained and for how long.

It is worth noting that no other HR software provides you with this functionality, which can leave users of such software at risk of GDPR non-compliance. The Youmanage Data Retention Framework gives you the power to:

- Set your own data retention rules to choose what data is deleted and when

- Choose whether to anonymise data, rather than delete it, for reporting purposes

- Purge any data that is no longer required

## IP Whitelisting

IP whitelisting is a security feature used for limiting and controlling access only to trusted IP addresses. This means you can:

- Dictate where users can access Youmanage from

- Create lists of trusted IP addresses (or IP range)

- Narrow the scope of potential risks you are exposed to

# Implementation & Training

However you choose to implement Youmanage in your business – whether it be with our support, including implementation help and training, or taking a more hands-on approach – the Youmanage Support Team are behind you the whole way.

We will work closely with you to ensure that your system is configured correctly to meet your specific operational requirements.

### Rapid Implementation

Whether you choose to self-implement, or ask Youmanage to assist you with some elements of your project, our focus is always to ensure that your unique Youmanage system achieves your overall business objectives.

### Data Upload

We will assist you in uploading your data to Youmanage by using our comprehensive data import templates.

### Software Training

We offer both System Administrator and end-user training, allowing you to learn how to get the most out of Youmanage.

"It's a well-designed, user-friendly tool for managing HR that's really adaptable and flexible. It has excellent functionality and the support team are the best I've encountered."

**Nathan Galleysmith**
**General Manager**
**Healthcare Computing**

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**Try for Free**

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