

Totara Perform Empowers Workplace Performance Management And Competency Tracking

Totara

Best Advance in Performance Management Technology

July 2022



Company Background



Company-at-a-Glance	
Headquarters	Wellington, New Zealand
Year Founded	2010
Employees	90
Global Scale	Worldwide (Americas, EMEA, APAC)
Customers/Output, etc.	U.S. Department of Agriculture, Deloitte, PepsiCo, Save The Children, Wella, Met Office, Western Union, JetBlue, Lidl, Yamaha, Vistaprint, Volvo, NHS. Key services: Learning technologies (a Talent Experience Platform comprising a learning management system, learning experience platform, performance management system)
Industry	Computer software
Website	totaralearning.com

Value Proposition

Totara Perform is a performance management system with adaptability and productivity at its core. Organizations have the power to create evidence-based performance reviews, get an objective view of employee performance and quickly identify and close skills gaps to remain competitive. With Totara Perform, organizations can harness the power of continuous performance management to boost in-office or remote workplace productivity anytime, anywhere.

Competencies are a major part of the Totara Perform feature set. Competencies, competency assignment and managing the review of competencies and goals within a performance activity

are integral to the performance management process. Totara Perform makes it straightforward for managers and employees alike to understand what training, skills and behaviors are required to improve their competency level. Competencies can also be linked to learning modules and resources as part of an employee's learning plan, integrating the learning and performance management experience for the employee.

Following the launch of Totara's Talent Experience Platform in 2020, organizations such as the US Department of Agriculture, Alshaya, the Premier League, O2, T-Mobile and Farmlands have adopted Totara Perform to support performance management alongside their existing Totara Learn learning management systems.

Customers are currently implementing Totara Perform for a wide range of use cases, including gathering and analyzing 360 feedback, connecting performance with learning activities, tracking performance check-ins, appraisals and identifying and addressing skills gaps across the organization.

Product or Program Innovation

Totara Perform is based on open technology, making it straightforward for any organization to adapt the out-of-the-box features and functionality to their unique requirements. While Totara Perform works straight out of the box, its real power comes when organizations customize the system to their needs, whether that's performance management conversation scheduling, managing the feedback process or supporting complex management and reporting line structures.

Integrating Totara Perform with other systems within an organization's IT infrastructure is straightforward. Aside from the built-in integration with Totara Learn and Totara Engage, Totara Perform can also be easily connected with the payroll system (ideal for merit-based salary increases), HR system, the intranet, communication programs and virtually any other system. This reduces the workload for HR administrators and managers and, with single sign-on (SSO), gives employees a seamless user experience, without needing to remember multiple logins for separate systems.

On top of the performance management system, Totara Perform also fits seamlessly into the broader Totara Talent Experience Platform. Learning, engagement and performance are often siloed within organizations, leading to confusion, duplication of efforts and mixed messages from the HR department. With the full Talent Experience Platform, performance management specialists within the HR team have full oversight over all learning and engagement activities and can build this into their performance management initiatives. For example, it is preferable to place learning opportunities into the flow of work, and to encourage teams to collaborate and learn together when solving real business problems and innovating new ideas. This action learning is tightly linked to business goals and related performance metrics. An individual's

contribution and results of their learning activities can then form part of the full picture of an employee's performance.

A key part of Totara Perform's adaptability comes in the form of the Totara Partner model. With close to 100 Totara Partners worldwide, customers have the freedom to choose the best partner for them, whether that's based on expertise in their sector, geographic location, specialist technical, hosting or support skills or anything else.

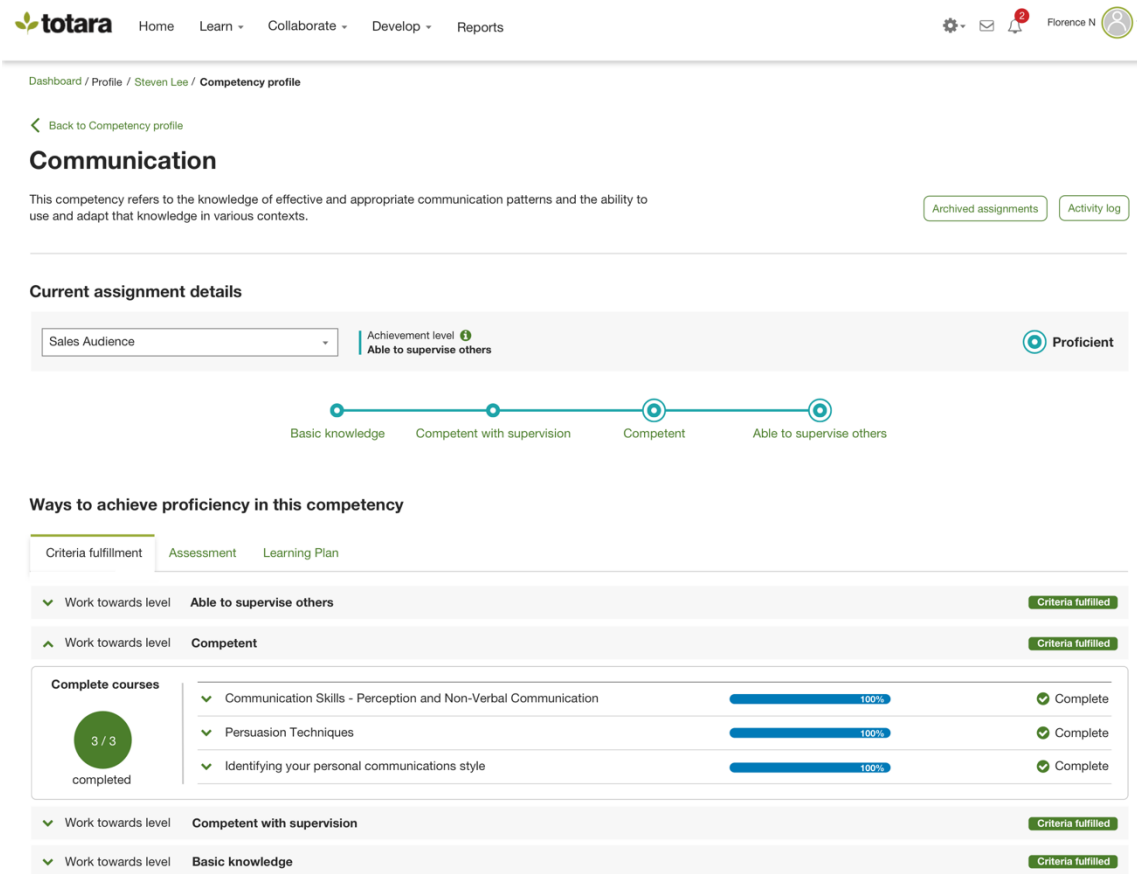
In 2020, the Totara Alliance Partnership program launched alongside the release of Totara's Talent Experience Platform. This program recognizes Totara's top-tier partners and allows them to expand their market presence by supplementing their existing Totara Learn services with Totara Engage and Totara Perform. This means that any customers selecting Totara Perform can always be confident that they are receiving the best possible service from a leading Totara Partner, and they have the freedom to switch to another partner within the network at any point if their needs change.

Unique Differentiators

While there are many standalone performance management products on the market, what sets Totara Perform apart is the fact it has been developed by experts in workplace learning, to integrate seamlessly with learning software to bridge the gap between learning and performance.

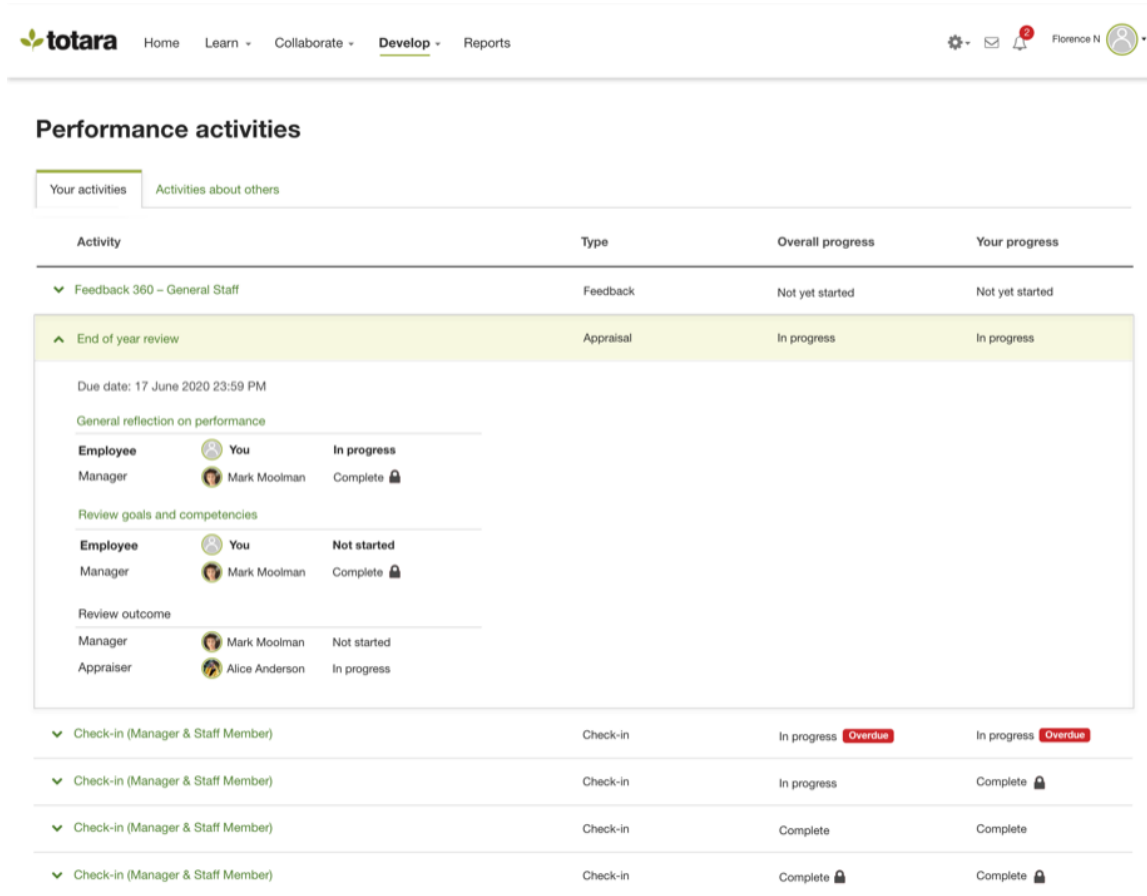
With Totara Perform, organizations can choose to use the system alone or as part of Totara's wider Talent Experience Platform to bring together their efforts across learning, engagement and performance in the workplace. It does this by putting adaptability at its core, meaning customers can accurately reflect their organization's performance management processes, hierarchies, structures, workflows and schedules.

Figure 1: Competency Management In Totara Perform



The screenshot shows the 'Communication' competency profile in Totara Perform. The user is Steven Lee, and the profile is for the 'Sales Audience' assignment. The achievement level is 'Able to supervise others', which is equivalent to the 'Proficient' level. A progress bar shows the user has reached the 'Able to supervise others' level, with four stages: Basic knowledge, Competent with supervision, Competent, and Able to supervise others. Below this, the 'Ways to achieve proficiency in this competency' section shows that all criteria are fulfilled. Under 'Complete courses', three courses are listed, all completed at 100%: 'Communication Skills - Perception and Non-Verbal Communication', 'Persuasion Techniques', and 'Identifying your personal communications style'.

Totara Perform's features and functionality are designed to fit around each organization's unique requirements. The screenshot above shows the competencies feature, which is fully customizable to ensure organizations can apply their own approach to competencies and skill building within the system. This includes everything from fulfilling criteria to competency levels, so organizations can use their own language, assessments, levels and more to demonstrate competencies.

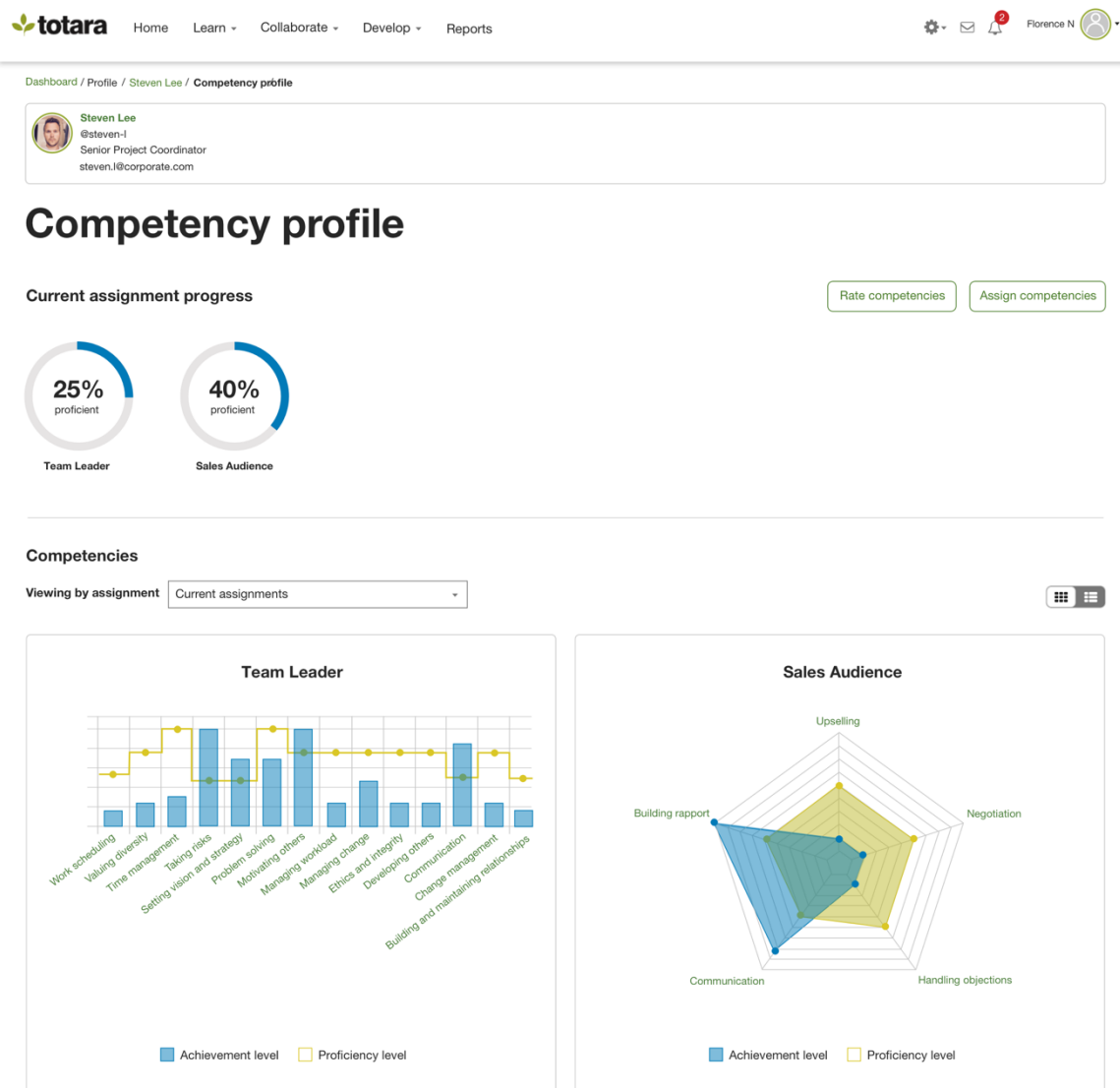
Figure 2: Performance Management Scheduling And Feedback Activities


The screenshot shows the Totara Performance Management interface. At the top, there is a navigation bar with the Totara logo and menu items: Home, Learn, Collaborate, **Develop**, and Reports. On the right, there are icons for settings, email, notifications, and a user profile for Florence N.

The main section is titled "Performance activities" and has two tabs: "Your activities" (selected) and "Activities about others". Below the tabs is a table with the following columns: Activity, Type, Overall progress, and Your progress.

Activity	Type	Overall progress	Your progress																					
Feedback 360 – General Staff	Feedback	Not yet started	Not yet started																					
End of year review	Appraisal	In progress	In progress																					
<p>Due date: 17 June 2020 23:59 PM</p> <p>General reflection on performance</p> <table border="1"> <thead> <tr> <th>Employee</th> <th>Progress</th> </tr> </thead> <tbody> <tr> <td>You</td> <td>In progress</td> </tr> <tr> <td>Manager: Mark Moolman</td> <td>Complete</td> </tr> </tbody> </table> <p>Review goals and competencies</p> <table border="1"> <thead> <tr> <th>Employee</th> <th>Progress</th> </tr> </thead> <tbody> <tr> <td>You</td> <td>Not started</td> </tr> <tr> <td>Manager: Mark Moolman</td> <td>Complete</td> </tr> </tbody> </table> <p>Review outcome</p> <table border="1"> <thead> <tr> <th>Role</th> <th>Name</th> <th>Progress</th> </tr> </thead> <tbody> <tr> <td>Manager</td> <td>Mark Moolman</td> <td>Not started</td> </tr> <tr> <td>Appraiser</td> <td>Alice Anderson</td> <td>In progress</td> </tr> </tbody> </table>				Employee	Progress	You	In progress	Manager: Mark Moolman	Complete	Employee	Progress	You	Not started	Manager: Mark Moolman	Complete	Role	Name	Progress	Manager	Mark Moolman	Not started	Appraiser	Alice Anderson	In progress
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Additionally, every organization has its own performance management schedule. Totara Perform adapts to any schedule, whether that's a single annual appraisal or monthly performance check-ins. What's more, organizations are never locked into a specific schedule – if they change their approach or want different schedules for different teams, Totara Perform supports this. Managers, mentors and employees have easy access to their goals, competencies, feedback and performance management records and more, ensuring everyone is aligned and performance levels are raised.

Figure 3: Learner's Competency Profile In Totara Perform


One of Totara Perform's key strengths is its role in identifying and addressing skills gaps. Competency profiles and customizable grading systems show managers and employees where they are missing vital skills, helping to close the skills gap and improve productivity. This is where the connection between Totara Perform and the rest of the Talent Experience Platform comes into play – managers can identify skills gaps and assign learning to fill these gaps on each employee's learning plan.

For example, Totara Perform may surface that Employee A is lacking in public speaking skills, which are vital for the promotion they want. Employee A's manager will identify this skills gap in their competency profile, and they can assign an e-learning course, a mentoring program or a workshop within Totara Learn. This will be added to Employee A's learning plan, showing them clearly what they need to do to become competent in this skill.

Finally, Totara's configurability is a key part of what makes it unique on the market. It supports continuous improvement practices, allowing an organization to change the way performance practices are delivered as their approach matures over time. There is no need for an all-or-nothing approach; instead, organizations can improve their processes iteratively over time, whether that means increasing the frequency of performance check-ins, adding 360 feedback or scrapping the traditional annual appraisal entirely.

Measurable Results

Totara Perform has been on the market for less than a year, but is already proving popular for more mature learning organizations looking to take the next step in combining learning and performance.

Organizations such as the US Department of Agriculture, Katoen Natie, Tamimi Markets, Argenta Spaarbank, Farmlands, T-Mobile, O2, Alshaya, eXtra Stores, Premier League and Abu Dhabi Judicial Department have already chosen Totara Perform as their performance management system of choice.

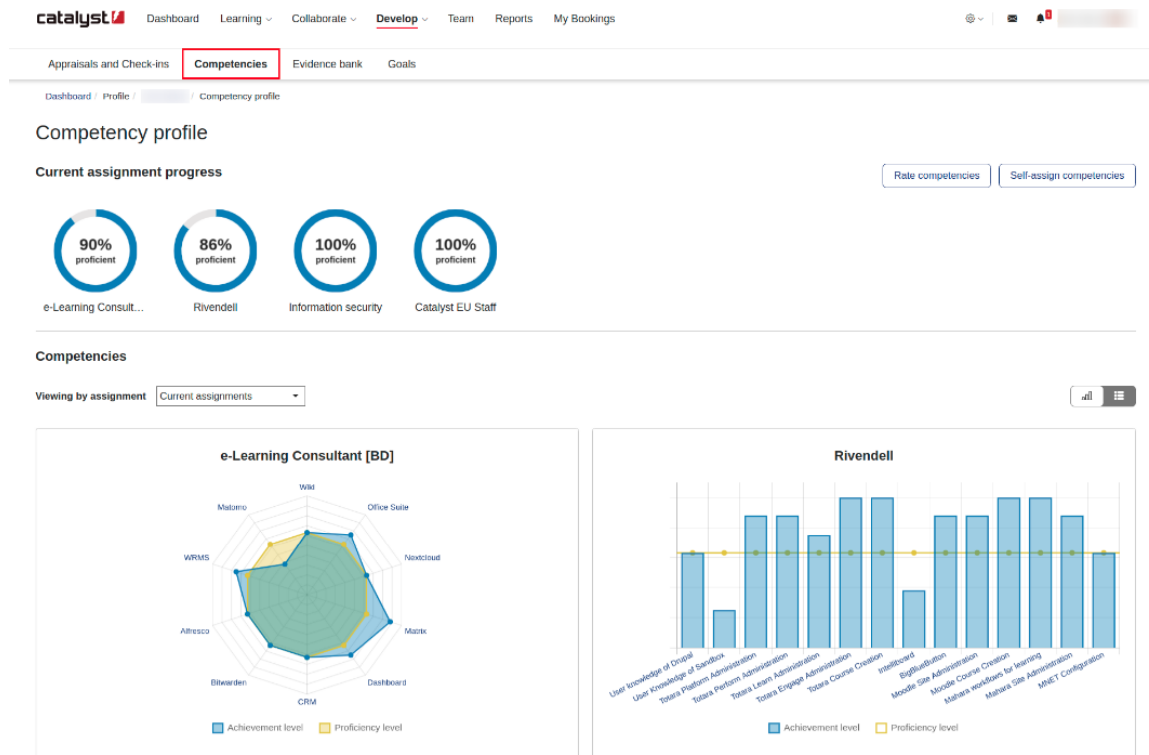
Katoen Natie chose Totara Perform to improve their competency management — particularly status reports. Previously, they managed this manually in an Excel spreadsheet, which was time-consuming and prone to human error.

With Totara Perform, competency scales are automatically updated upon completion of a course, which has significantly improved their reporting process, saving time and reducing admin work.

On top of their competency status report, Katoen Natie's Totara Partner has also added the ability for the customer to filter by the latest competency within their reporting. This was an additional requirement on top of what was already available within the core product, and the adaptability and open technology of Totara Perform ensured that the Totara Partner was able to customize the solution to the customer's exact needs.

Thanks to the introduction of Totara Perform as part of their Talent Experience Platform, Katoen Natie has cut administration work by 20%, allowing them to focus their time and effort where it really matters. This is because Katoen Natie's managers can now evaluate training outcomes within Totara Perform as it automatically syncs up with Totara Learn, making the whole process much more efficient.

Catalyst IT EU implemented Totara Perform as part of the full Totara Talent Experience Platform. They use Totara Perform for competency mapping to help identify which skills and knowledge are required across the organization. Thanks to Totara Perform, each role now has its own set of competencies needed to perform the job effectively, as well as company-wide competencies applying to everyone.

Figure 4: Catalyst IT EU's Competency Profile In Totara Perform


Using Totara Perform's new Competency Profile and Achievement pathways, Catalyst staff, managers and HR can get a visual display of an employee's current level of proficiency, which ties in nicely with the monthly check-ins as a point for discussion. Along with the competencies Catalyst created its own internal "mastery" scale from "No experience as yet" all the way to "Champion," where users are issued a digital recognition badge for that competency. All staff are asked to rate themselves against this scale, with their line managers reviewing the results during the monthly check-ins (the manager has permission to change the rating).

The introduction of this system has enabled Catalyst IT EU to administer badges to show competency levels across the organization, with 80 administered to 30 employees. This will help employees identify experts in certain fields, systems and topics, making it easier to share skills and knowledge across the organization.







"Feedback on initial rollout has been very positive, both from a personal perspective (completing my own for review by my line manager) and as a line manager reviewing my team. The competencies and frameworks have already led to conversations about personnel continuing professional development, areas of strength and areas individuals want to develop their skills in."

— Richard Oelmann, Head of Business Development, Catalyst IT Europe

Additionally, Catalyst uses Totara Perform for monthly check-ins as part of their continuous performance management process. A check-in form is sent to all staff monthly to talk about

challenges, achievements and wellbeing, which is then discussed with their line manager. This has been built into the onboarding process for new employees, which has significantly improved new employees' talent experience within their first six months at Catalyst.

Figure 5: Monthly Check-Ins Per Catalyst's Continuous Performance Management Process

Activity title		Type
Monthly check-in (Group 1) (15 June 2021)		Check-in
Created 15 June 2021.		
Well-being		
Subject	 You	Complete 
Your reflections and the past 4 weeks		
Subject	 You	Complete 
Manager	 Richard Oelmann	Complete 

All Illustrations Provided By Totara

"Both Totara Engage and Totara Perform offer additional functions that go beyond what a traditional LMS can provide." — Totara Perform user, 2021

"Totara Perform makes performance improvement approachable and accessible, since it provides a framework that makes it an easy and everyday thing for all involved."

— David Patterson, Learning Light

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