Beyond Performance Reviews: Designing a Data-Driven Employee Experience

ORGDEV atd

WHO AM I?

FIRSTBORN OF 9 & KEEPER OF HER PARENTS' HOUSE,
INDUSTRIAL ALCHEMIST OF WORK & MINDS
MOTHER OF KELVIN (+TOYA)
ARCHITECT OF LEADERS,
FINDER OF TREASURES
GATHERER OF MAKERS
LOVER OF DESIGN & SNOB OF COFFEE
SHE WHO READS DIFFERENTLY YET SEES MORE
& PAUSES

WHAT I DO

25 YEARS
TALENT DEVELOPMENT
ORGANIZATIONAL DEVELOPMENT
TALENT MANAGEMENT
TALENT ACQUISITION
8 INDUSTRIES (300 TO 200,000)
DESIGNER+FACILITATOR
COACH
YOGA INSTRUCTOR

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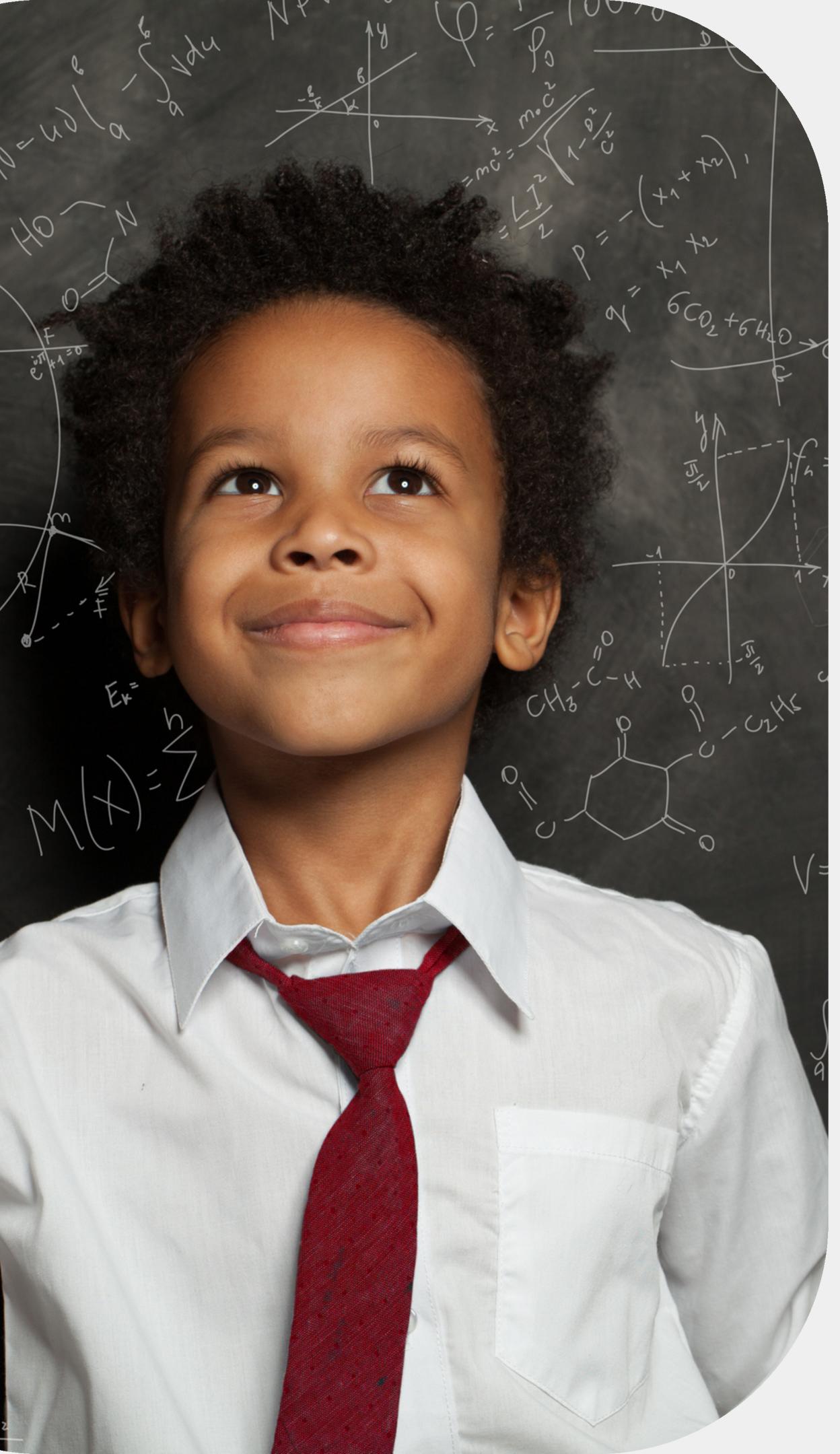
OBJECTIVES

Apply a data-driven framework to optimize performance management and create measurable improvements to employee engagement, talent management and talent development.

Develop a continuous feedback system that empowers managers to enhance employee growth, engagement, and retention.

Implement a cross-functional talent strategy that aligns HR, DEI, employee engagement, and talent acquisition for long-term success in partnership with the business.

GREATEST EXPERIENCE ON EARTH

LONG LINES

FAR FROM GOALS

ALL DAY EVENTS

BUT WE KEEP COMING BACK

STORYTELLING & IMMERSIVE THEMING:
Excels at creating **detailed, immersive environments** that make guests feel like they've stepped into the stories and worlds of their favorite films.

MAGICAL EXPERIENCES:
Core focus is generating feelings of magic and wonder, delivering unforgettable, **high-quality** entertainment and **experiences** for all guests.

INNOVATION & TECHNOLOGY:
Blend art, science, and technology to create new and exciting attractions and **experiences**, constantly pushing the boundaries of what's possible!

GUEST SERVICE:
Renowned for their exceptional customer service and dedication to making every guest feel special.

CONTINUOUS EVOLUTION:
Constantly developing and improving, to be "alive" and "breathing" with ongoing updates and innovations.

5

WHAT IMPACT DOES EMPLOYEE EXPERIENCE HAVE ON PERFORMANCE?

WHAT DO OUR EMPLOYEES WANT FROM THIS EXPERIENCE?

WHAT DO MANAGERS WANT FROM THIS EXPERIENCE?

MAP YOUR CURRENT PROCESS

January
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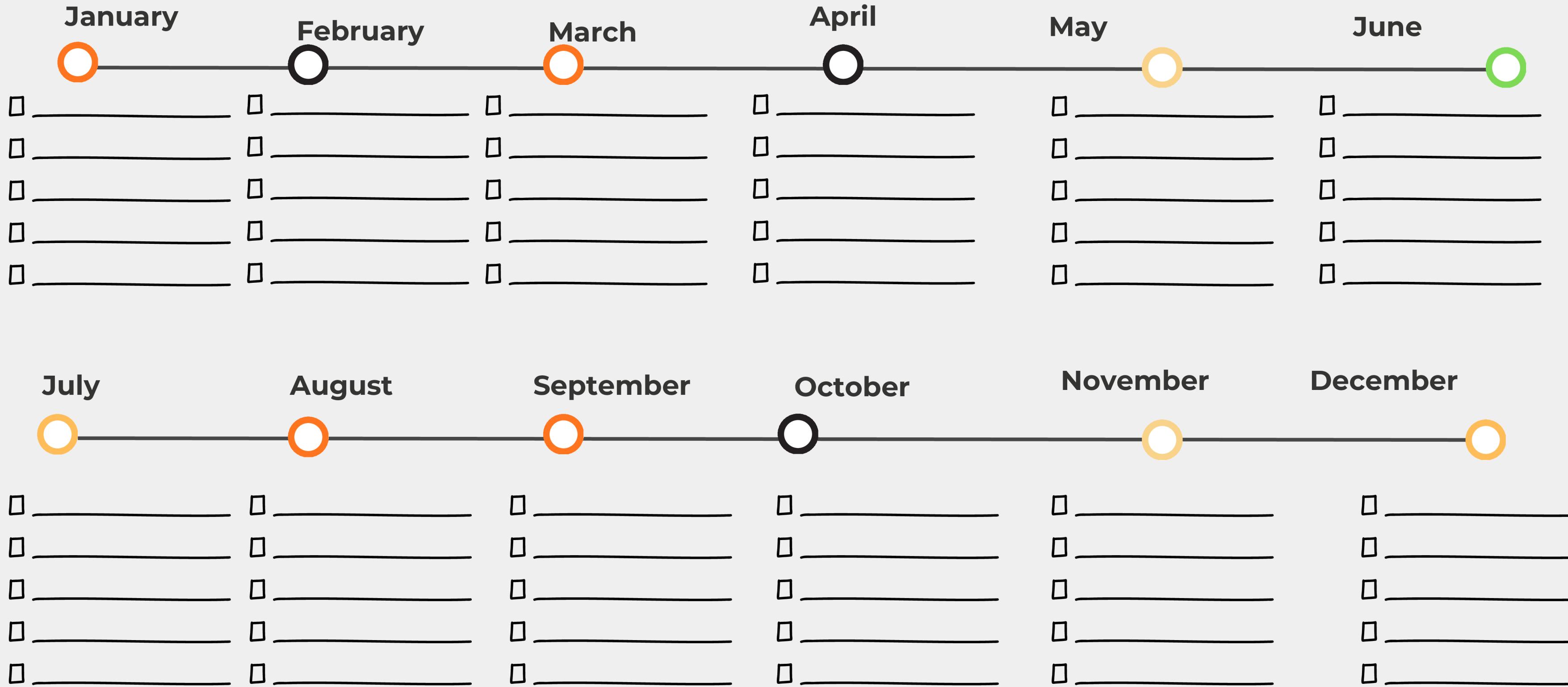
01

From Annual to Continuous: Frequent check-ins (_____)

02

From Ratings to Growth: Emphasis on skills, career paths, future readiness & _____

03

From Manager-Owned to Shared Accountability: Employee-driven, manager-supported, with peer input, coaching and _____

04

From Compliance to Enablement: Simple, agile tools that focus on coaching & _____, not paperwork.

05

From Rearview to Forward-Looking: Focus on development, employee engagement, accountability & _____ not just evaluation.

Key shifts--------------------->employee experience

Thoughts

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AVERAGE PROCESS ----> EMPLOYEE EXPERIENCE

**Before
(Compliance and Transactional)**

**After
(Developmental & Evolving)**

Performance Management

Talent Management

01 Goal Setting (Q1)

02 Mid-Year Check-in (Q2)

03 Year-End Evaluation (Self-Assessment & Manager Review)

04 Peer/Upward Feedback - (Optional)

05 Calibration Sessions & Final Ratings

06 Compensation Decisions & Performance Conversations

01 Quarterly Goal Alignment

02 Ongoing Coaching & Development Conversations

03 Real Time Feedback & Recognition

04 Performance & Engagement Snapshots

05 Holistic Compensation & Talent Decisions

06 Employee & Manager Empowerment + Capability Building

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EMPLOYEE EXPERIENCE

Pros

Cons

01 **Quarterly Goal Alignment**
- OKRs or outcomes revisited every 90 days.

02 **Ongoing Coaching & Development Conversations**
- Monthly 1:1s with structured check-ins on performance, wellbeing, and development.
- Individual development and growth plans linked to skills and future roles & needs.

03 **Real-Time Feedback & Recognition**
- **Peer-to-peer recognition system**
- Feedback System vs. Opinion System

04 **Performance & Engagement Snapshots**
- Quarterly (short forms, not heavy reviews).
- Lightweight performance snapshots.
- Pulse Surveys: Engagement & Performance, plus feedback on the system.

05 **Holistic Compensation & Talent Decisions**
- Based on impact, skills, growth, and business needs.
- Data-backed

06 **Employee & Manager Empowerment & Capability Building**
- Training managers to be performance coaches, not just to evaluate performance.
- Employees own their growth and request feedback, rather than waiting for review season and have a voice in the system.

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TALENT MANAGEMENT & DEI TOUCH POINTS

Hire & Offer
Signal expectations: define level, values & competencies (feeds calibration, pay bands).

DEI: Job postings written inclusively, culture+experience, pay equity checks.

Onboarding (1st 90 Days)
Goal-setting, buddy system, development plan (feeds first review readiness).

DEI: Accessibility, Tech, Belonging programs (ERGs, buddies), inclusive manager checklists & set the foundation for coach/manager relationship

Role Clarity & Goal Setting
Alignment of OKRs/KPIs to level frameworks (supports performance outcomes).

DEI: Train managers in bias-free feedback; ensure equity in team reviews.

Check-ins & Growth Plans
Monthly/quarterly conversations logged (creates calibration-ready evidence). Skills-to-role map, stretch work (drives readiness index).

DEI: Integrate into all learning and performance.

Create employee experiences

Weaving DEI into the Moments That Matter within HR: Talent creates equitable growth, and inclusive cultures.

Calibrations & Promotions
Promotions, pay, or corrective actions (are equitable & evidence-based), Rater alignment, equity checks (feeds comp & promo decisions).

DEI: Require evidence over perceptions; review outcomes for demographic drift.

Transitions Management
Manager: Assimilation plans, resets with teams (protects performance continuity).**Life Events:** re-entry plans (safeguards career momentum)

DEI: Normalize parental/caregiver leave for all genders; re-entry equity plans.

Rewards & Recognition
Timely, values-linked acknowledgments (improves engagement & retention)

DEI: Spotlight diverse contributions, not just loudest voices.

Development
Provide training and support for employees and managers on coaching and feedback. Provides purpose driven development and ensures program alignment (Values: culture anchors)

DEI: Learning opportunities equitably distributed (no favoritism). Sponsor assignments to level access.

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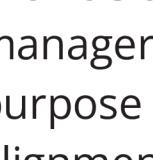
QUARTERLY CHECK-IN CONVERSATION

Check-ins are designed to be frequent, flexible, and integrated into the regular flow of work, moving away from formal, static annual reviews

PERFORMANCE

01 Ensure clarity on roles, goals, and expectations. People Leaders review progress against goals set at the start of the year. Includes behavioral goals tied to company values, OKR/goals, and personal/career development.

GOAL REALIGNMENT

03 Provide guidance and support by taking notes on employee achievements, conversations, improvements, and concerns, which can later inform formalized reviews.

COACHING

02 Discussions should include areas where the employee is growing most and where they feel stuck, serving as a platform for coaching and constructive feedback.

DEVELOPMENT

04 Focused on growth, not solely evaluation. Managers should discuss development plans as they relate to the employee's current job and future career aspirations.

← Manager — **Performance Coaching** — **Coach →**

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DESIGN THE CONVERSATION

Define the new skills and rhythm.

Host quarterly deep dives to focus on What and "How" (as a coach and people leader).

Ensure goals can be adjusted quarterly.

Focus on how performance is tied to company values, OKR/goals, personal and career development, and team development.

Values (HOW)
Assess through observable behaviors and organizational culture. Occurs across frequencies, from continuous or monthly check-ins to comprehensive annual processes.

Goals/OKR (WHAT)
Quantitative Assessment determine the primary metric to assess. Evaluate monthly if on/off target. Look for blockers/risks and if adjustment or support is needed.

Scope/Growth of the Role
Assess where the employee is growing the most and where are stuck. Identifying areas to focus/grow in the next quarter, stretch goals, and new objectives to pursue.

Personal Development
Integrates personal development and alignment. Assess skills developed and offer coaching note moments of leadership or initiative.

Team Development
Assess needs of team: Connecting team-level skill deficiencies or organizational opportunities via strategic assignment and goal setting. Offers growth by addressing capability gaps or preparing for future strategic needs.

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Leverage AI
(Plug n Play for People Leaders)

Create a GPT for Feedback and Coaching

Create a GPT for Quarrels Check-in Conversation.

Create a GPT for Annual Summary

DESIGN GUIDELINES

DATA
DESIGN THINKING
PERFORMANCE COACHING
HUMAN PERFORMANCE IMPROVEMENT

DIAGNOSE "AS IS"
Current workforce data

ALIGN AND SET DIRECTION:
Align with your organizational culture: Core Strategy, Business Objectives and Key Business & Culture Drivers

INNOVATION & TECHNOLOGY:
Blend art, science, and technology to create new and exciting attractions and **experiences**, constantly pushing the boundaries of what's possible in your Talent Management Experience

EMPLOYEE EXPERIENCE:
Renowned for their exceptional customer service and dedication to making every guest feel special.

CONTINUOUS EVOLUTION:
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EMPLOYEE
DEMOGRAPHICS

EMPLOYEE
ENGAGEMENT

KEY METRICS + OKRS

DATA IS NOT THE
ENTIRE STORY BUT
YOU NEED IT TO TELL
A STORY

METRICS THAT MATTER

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PEOPLE ANALYTICS

WHAT: GOALS + OKRS

HOW: VALUES + BEHAVIOR

DEVELOPMENT/GROWTH GOALS
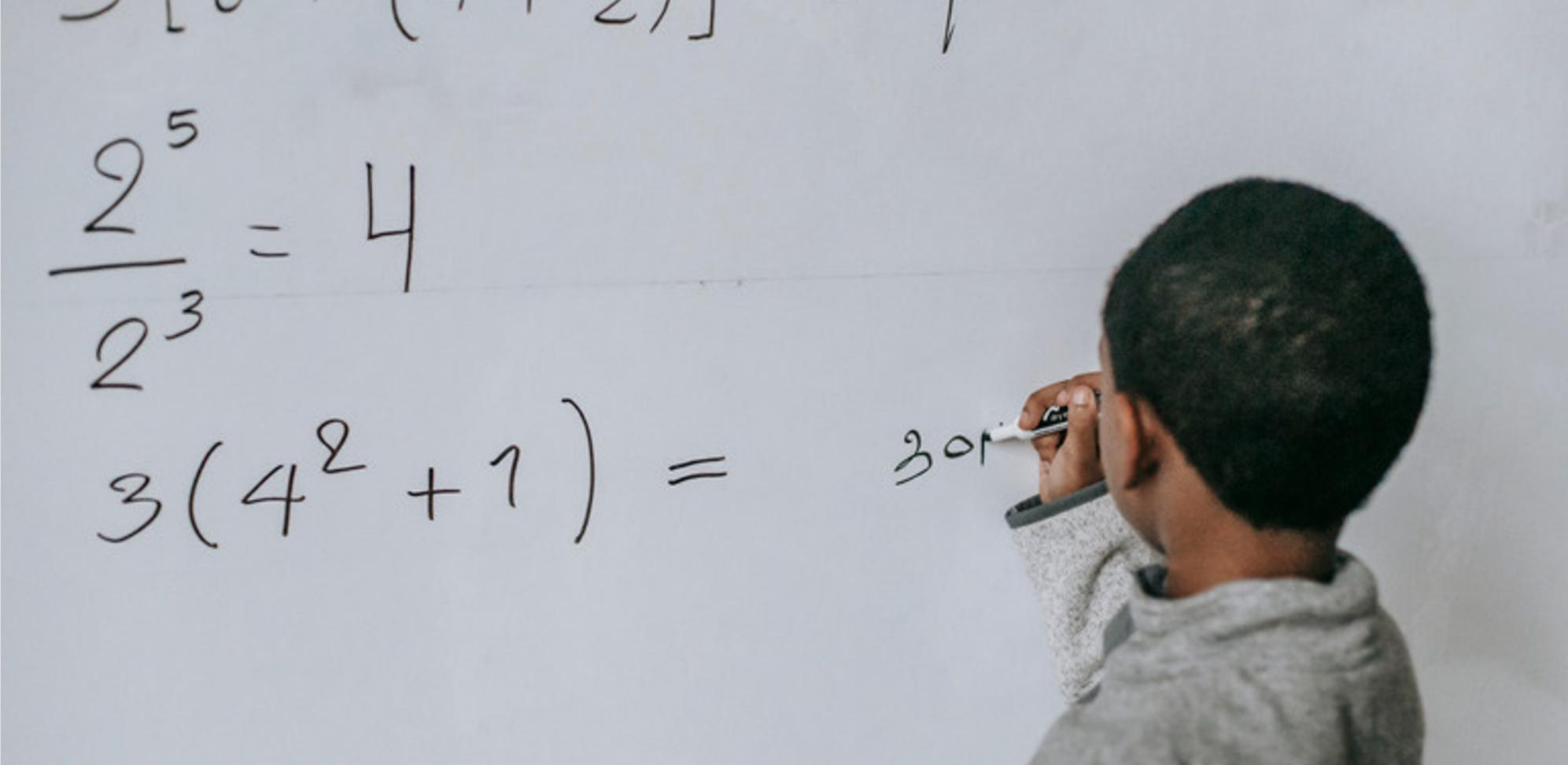
**MANAGER
EFFECTIVENESS**

DATA THAT PROVIDE
REAL-TIME & **NEEDED**
INSIGHTS SERVES AS THE
FUEL FOR THE SYSTEM

WHAT METRICS MATTER

(19)

Talent Data Landscape

Workforce Profile & Readiness

Time in Current Role

% in 1st Role vs. 2nd Roles

Time at Level

% Nearing Retirement

9-Box Grid Placement

Performance Ratings

Goal: Snapshot of workforce maturity and bench strength at a glance, critical for succession and planning training investments.

Talent Movement & Pipeline Health

of Roles at Current & Next Levels

# of Promotions / Lateral Moves / External Hires (past 12 months)

Recruitment Spend (Past 2 Years)

Use of Search Firms or Consultants

Of applicants for hard to fill roles

Goal: Snapshot of where talent is moving or stalling. Helps make a case for internal mobility programs, manager development, or skill-building efforts.

Succession, Gaps & Development Focus

Succession Coverage per Role (now, 1–2 years, future)

Forecasted Vacancies (12–36 months)

Top Common Skill Gaps (visual: bar or radar chart)

Current Development Programs at Levels/Roles

Key Learning Metric

Goal: Snapshot of your Action Zone. How well the organization is preparing future leaders and where the learning function can step in.

PULSE SURVEY

Alignment to Culture and Org Health

Annual Engagement Survey

People Analytics
Turnover
Retention
Succession Plan
Calibration Decision Quality
Internal Fill Rate (Mobility Success)

Quarterly Pulse Survey Design
Manager Check-in Rate
Goal Hygiene

Manager Effectiveness
Design to assess how managers are performing.
Design to align with one area of focus from the engagement survey.

Engagement
Design to pulse check Employee Engagement and make corrections sooner, plus it demonstrates the org is acting on the results.

Turnover/Stay
Design to provide the current turnover rate and assess the likelihood of staying.

Performance
Design to assess employees' current performance and whether they are receiving coaching and feedback. What is the status of OKRs/Goals?

Development
Design to asses employee areas of development and is development occuring for the employee.

SURVEY QUESTIONS

(Q1) **DID YOUR MANAGER HOLD YOUR QUARTERLY CHECK-IN SESSION THIS QUARTER?**
Acts as an accountability and effectiveness measure, ensuring managers adhere to the continuous system structure. +1: My manager effectively supports my performance and development

(Q2) **A QUESTION TO CHECK EMPLOYEE ENGAGEMENT.**
Pull from existing engagement survey. Goal: To predict engagement and turnover.
Example: I see myself still working here two years from now?

(Q3) **OKR QUESTION (E.G., "I KNOW MY GOALS," OR, "I AM HITTING MY GOALS FOR THE QUARTER").**
Checks alignment and goal clarity, a key benefit of performance management.
Example: I know what is expected of me at work?

(Q4) **THE RESOURCE QUESTION: "DO YOU HAVE THE RESOURCES YOU NEED FOR YOUR ROLE?**
Addresses whether employees have the resources they need to perform, aligning with the HPI principle that motivation depends on environmental support and resources.

SURVEY QUESTIONS

(Q5) **I HAVE A PROFESSIONAL DEVELOPMENT GOAL THAT I AM ACTIVELY WORKING TOWARD?**
Reinforces the focus on development for professional and personal growth.
=+1:My manager supports me in achieving my professional development goals."

(Q6) **A STAY QUESTION : IT WOULD TAKE A LOT FOR ME TO LEAVE THIS ORGANIZATION?**
Tracking turnover is crucial, as lower turnover is a quantifiable business benefit of engagement.

(Q7) **FOCUSED ON THE TEAM.**
WHAT ONE CHANGE WOULD MAKE THIS TEAM MORE EFFECTIVE OR ENGAGING?
Assessment of the team within a larger organization.

WHAT IS MISSING?
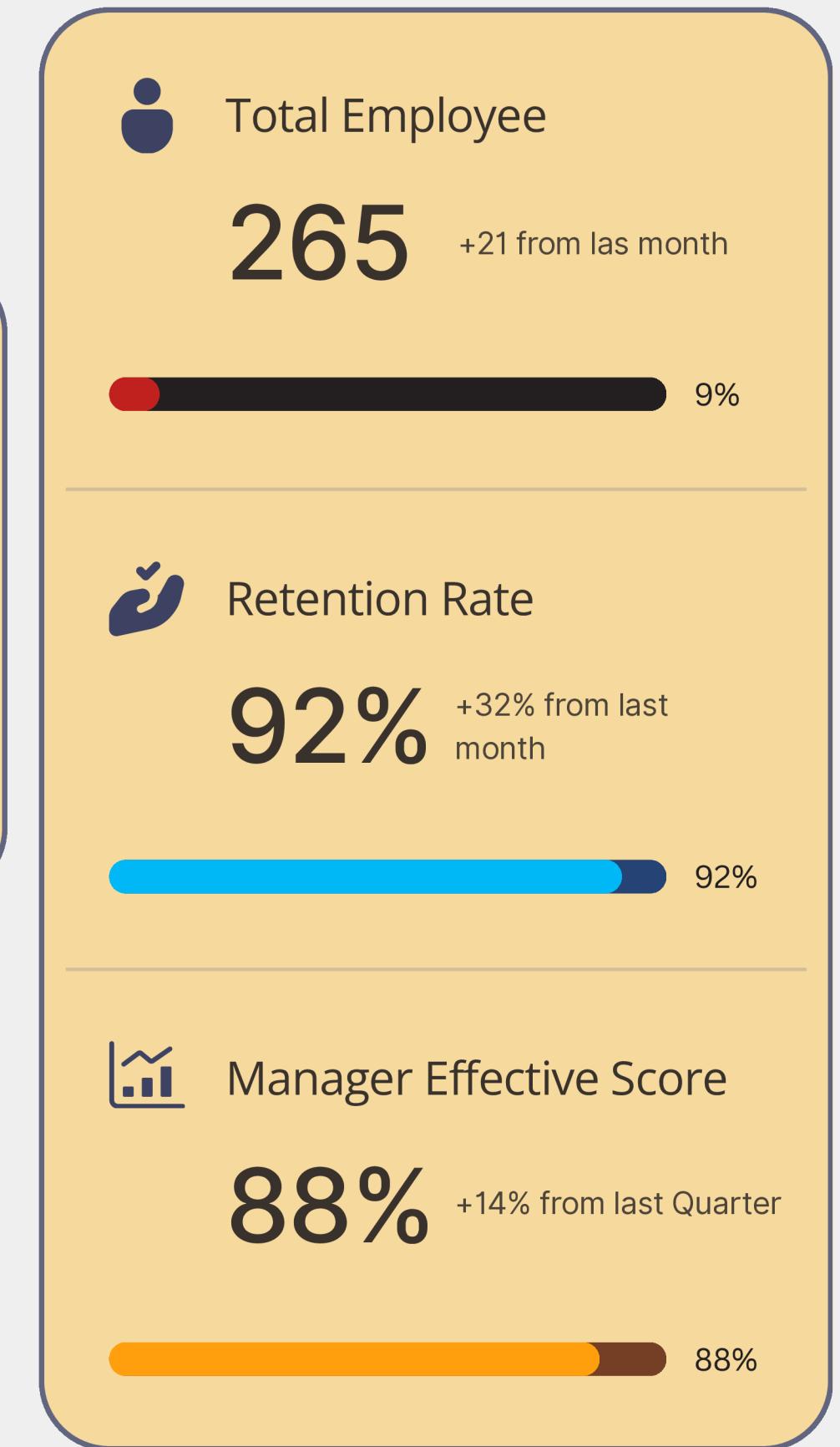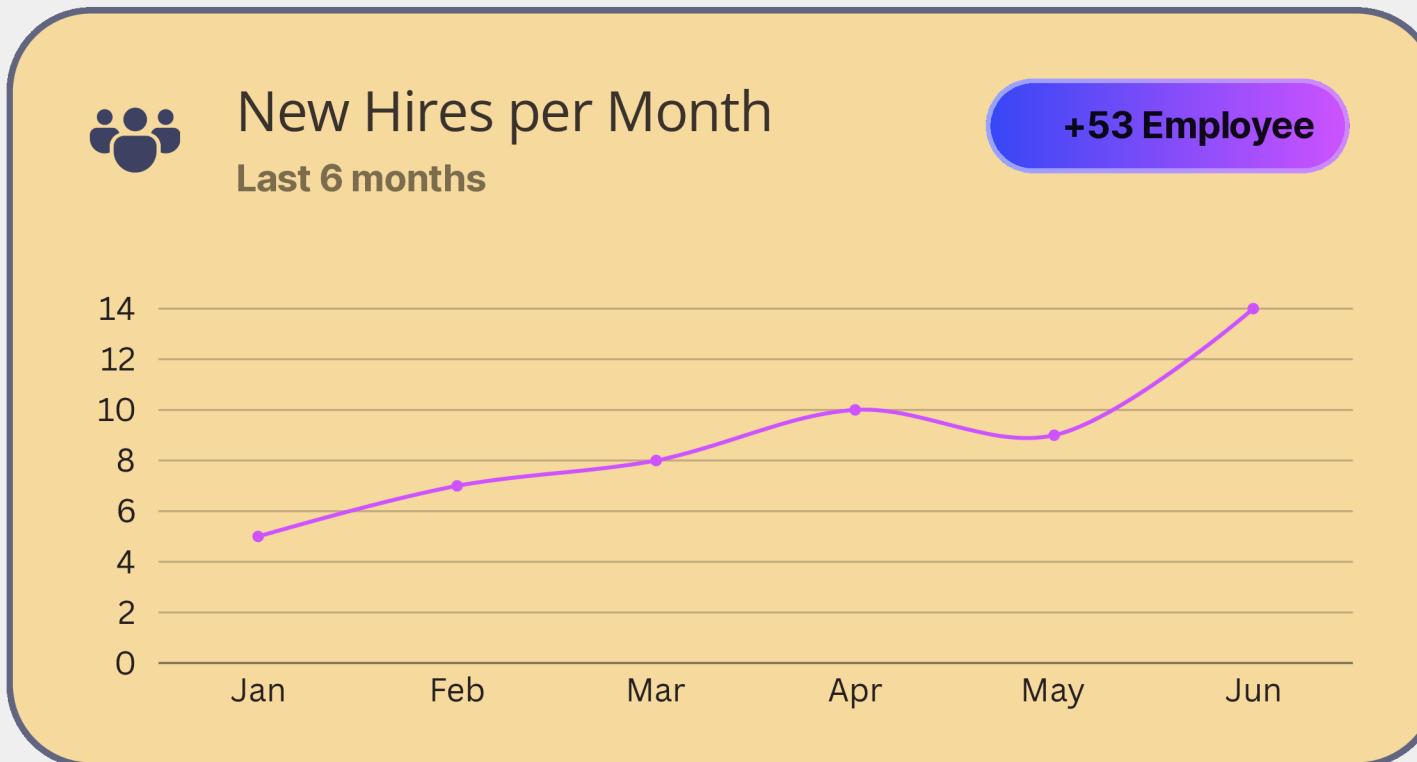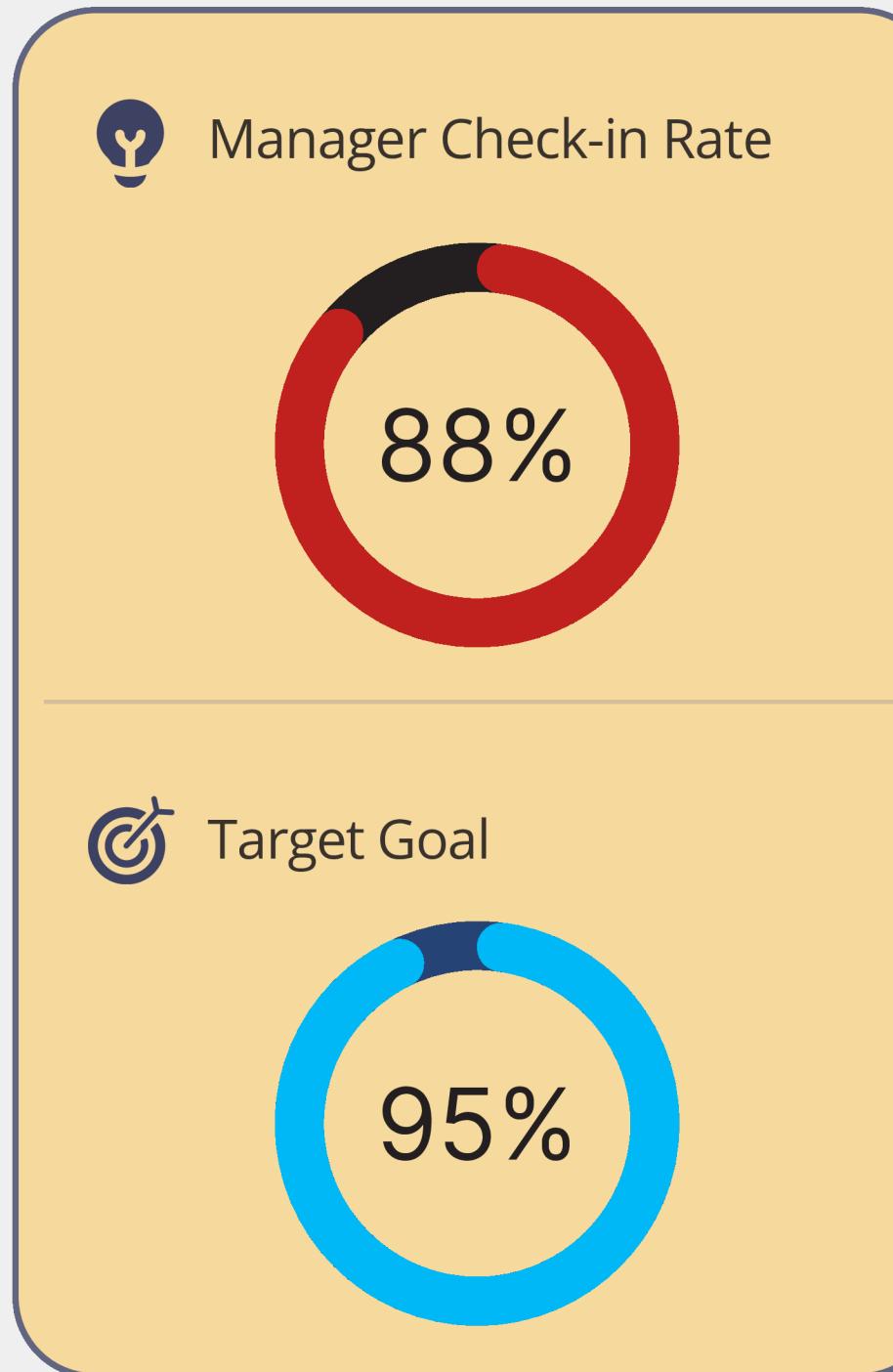
Org Leader View

Average Performance Review Score

Score	Department	Marketing	Sales	Operations	Support	Average
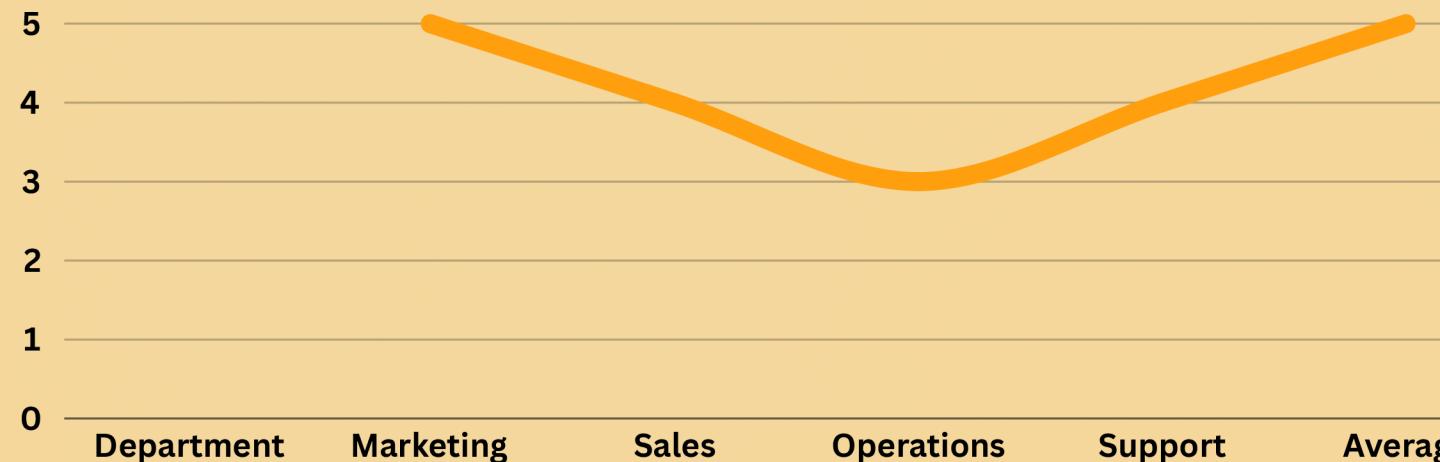
Employee Engagement Pulse Average

June 24 — Sept 24 — Jan 25 — March 25 — June 25 — Sept 25

Retention Rate by Org

**Marketing** 70%

Sales 55%

Operations 92%
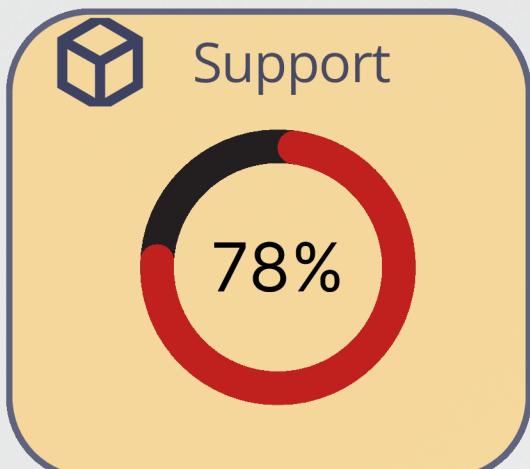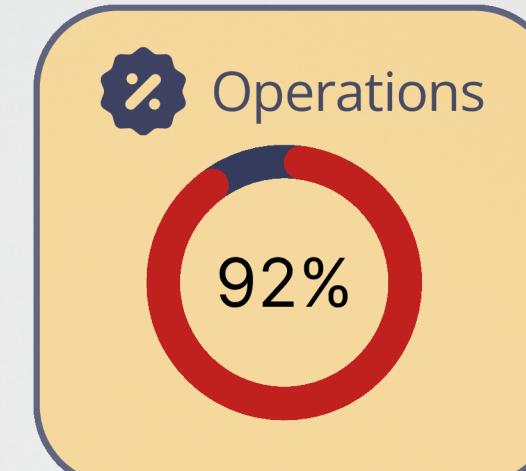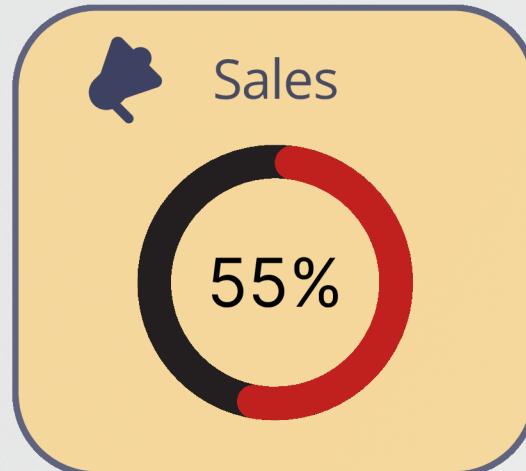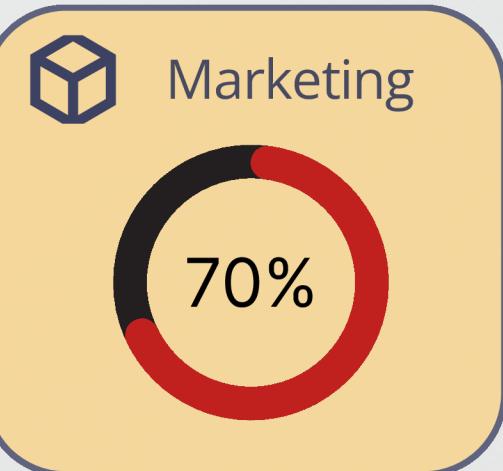
**Support** 78%

Key Insights

- Overall Manager Effectiveness Area of Focus 2025: Communication
- Overall Employee Engagement Area of Focus 2025: Voice

Talent Management
- Overall performance remains solid with an average of 4 driven by Support and Marketing. Operations average is 3
- 15% of employees are high performers a potential talent pipeline for future leadership.

Talent Acquisition
- Head of Sales exited org. 60 days ago: higher non-turnover

Talent Development:
- Communication Training for Leaders: 51% completion rate
- Communication Training for Employees 78% completion rate

Organizational Health

Leader	# of EEs	Eng. Score	Mngr. Eff. Rating	Mgr. Eff. Area of Focus	Open Reqs.	YTD Hires	Tenure Years	Attrition Rate	Avg. Time to Eff.	Promo. Rates	Manager Rating From Last Training	Comp. Rates Past Training	Gender %
1	642	81.88	3.78	Strategy	45	89	2-3 year	18%	90	30%	3.25	80%	21%
2	420	67.91	3.1	Coms	120	120	<1	31%	180	10%	2.78	60%	9%
3	378	81.88	3.78	Strategy	45	89	2-3 year	10%	180	28%	3.70	70%	30%
4	120	67.91	3.1	Team Building	120	20	<1	20%	180	35%	3.25	79%	46%
5	277	90.01	4.24	Strategy	40	33	3+	10%	90	30%	3.75	90%	38%

SO MANY MEETINGS, REALLY?

Check-ins are designed to be frequent, flexible, and integrated into the regular flow of work, moving away from formal, static annual reviews.

1 Annual Goal Conversation	8 Monthly 1:1 Convos	3 Quarterly Performance Check-ins	1 Final Annual Performance Summary	Bi-Monthly or Weekly Check-ins

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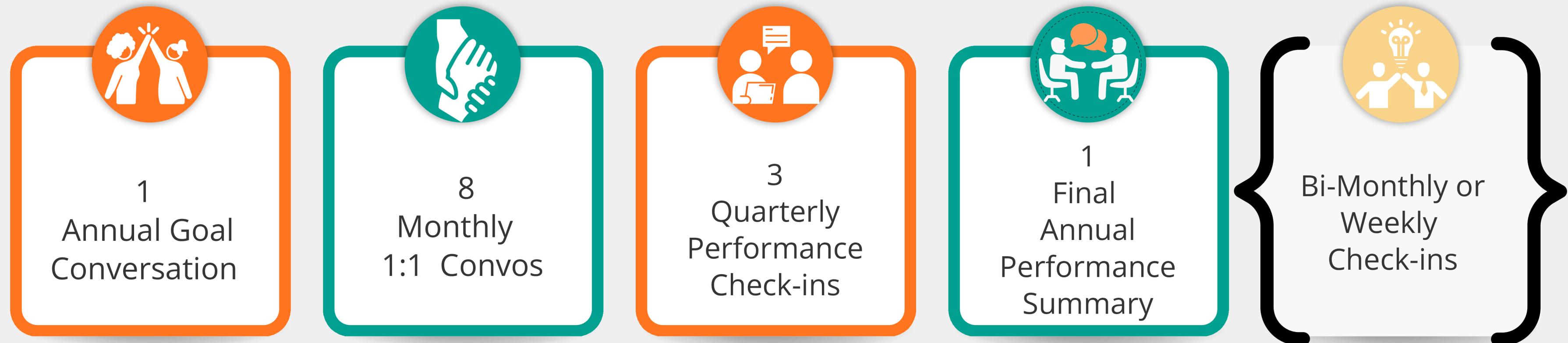
LINK TO TALENT DEVELOPMENT

Performance management system serves as the primary mechanism for diagnosing and formalizing individual and organizational development needs plus gaps.

01 Learning

Use performance data, behavioral assessments, and employee feedback to identify skill gaps and development needs. For example, AI-powered analytics platforms monitor performance measures, learning activity, and competency development to determine the impact of training and highlight where skill gaps persist.

02 Career Growth

The overall goal of this integrated system is to support a culture of continuous learning and growth that builds the organization's engagement, capability, and capacity, preparing the workforce for future needs.

03 Leadership Development

Identify key projects for leadership development experiences and coach/mentor rising leaders. Performance management is used primarily to identify program participation. Targets multiple levels of leaders for succession management.

04 Internal Mobility

Job rotation programs, a form of job movement, are specifically designed to give employees exposure to the entire operation through a planned schedule of different job assignments. This provides cross-functional learning experiences and bolsters the mission to create global talent.

05 Integration of HR Systems

Coordinated with other HR practices, such as training and selection, to succeed in improving performance. Talent strategy and management are defined as practices that integrate talent acquisition, employee development, retention, and deployment processes.

FEEDBACK COUNTS

Your feedback helps ATD continue to provide top-notch educational programs that help you stay on top of a changing profession.

The evaluation form for this session is available via QR code and at the following link: **OrgDev2025**

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THANK YOU.

TALENT SAGES UNITE

LET'S STAY CONNECTED
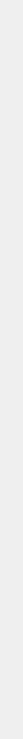
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