

# Quarterly Check-Ins with Annual 360s

How Five-Star Technology brought together light quarterly check-ins with broad annual 360 reviews to align their talented team around 6 core values.

*"Before, we were using all these Google tools, it was absolutely exhausting. So we started looking for a platform that would allow us to put in place the process I had designed. PerformYard had the features to let us build our process the way we wanted it. That's why we got so excited about it!"*

## At a glance

Quarterly check-ins with broad 360 reviews that are qualitatively coded around the company's six core values.

## Industry

Information Technologies & Services

## Location

Sellersburg, IN

## Size

51-200

## Highlighted Features

- 360 Reviews
- Multi-step Cycles
- Anonymity settings
- Sign-off Workflows
- Updating Goals in Reviews

## Customer case study

# Five-Star Technology

## About the Company

Five-Star Technology helps K-12 schools use technology to create awesome learning experiences for kids.

The company's 140 employees work from the headquarters in Sellersburg, Indiana, as well as from client sites across the state. A large proportion of the team at Five-Star Technology are engineering professionals who take on the role of a client school's technology department. There are also teams of educators who run professional development programming, and teams building software products.

Dr. Jason Roseberry, the Chief Innovation Officer at Five-Star Technology told us how their team does a lot outside of performance management to ensure everyone at Five-Star Technology is an extremely talented and driven individual. Therefore performance management focuses on aligning all that energy around the organization's core values. If their talented team is aligned on what matters, everything else will come together.

## Quarterly Check Ins

The quarterly check-ins at Five-Star Technology give employees guaranteed time for building relationships with their manager. Jason told us how people can become so focused on getting things done and be so heads down on projects that conversations about life and personal goals are not always prioritized.

The check-in consists of a meeting and a single form, authored by the manager and signed off by the employee and HR.

The form consists of questions that review progress towards goals and questions that kick-start a conversation on work-life. One of our favorites is "If you won the lottery and didn't have to work, what is one aspect of your job that you would miss the most?"

In addition to these questions, managers and employees also decide on a new goal for the upcoming quarter.

## Annual Reviews

Annual reviews are run on anniversary dates, so participating in reviews is a part of everyone's job throughout the year. The review process is staged and collects feedback from a number of different sources.

The first stage includes external feedback (usually a client), peer feedback and a self-reflection. The peer feedback section would also include upward feedback for managers.

The peer feedback form has a few open-ended questions that prompt the reviewer for examples of strengths and weaknesses as well as their general experience working with the employee.

The self-appraisal focuses on the six core values. Employees are encouraged to rate how their work aligned with the core values, give specific examples, and reflect on ways to improve in the future.

In the second stage, the manager analyzes these three sources of feedback (external, peer and self). They copy and paste quotes into their own form. Organizing them under strengths and opportunities in each of the six core values.

Dr. Jason Roseberry designed this step based on his experience with qualitative data analysis. This "qualitative coding" process helps managers see trends in feedback. It shows where employees are doing great, where they're struggling and even where others don't have much feedback to share.

"The diverse perspectives we collect help us feel comfortable that we're getting a real picture of an employee's performance. Because not everyone has the personality type to sell their manager on their own success."

The manager's review is sent to the employee 24 hours before their meeting. The other sources of feedback are not included, that feedback is not anonymous to the manager, but is not included in the employee's review document. This allows the employee to focus on the big picture and come to the meeting prepared to discuss the evidence and have a thoughtful conversation about what's next.

## 100 Day Survey

New employees get their own process at 100 days of employment. The first part is a survey about how the organization did onboarding the employee. It includes space for providing feedback, and a few questions that ensure the employee feels supported and knows where to turn for help.

There is also a manager review that looks at what progress has been made over the first 100 days, and what is next. The 100 day mark is also the moment when employees first start setting their goals.

**The Five-Star Technology uses PerformYard's performance management software to run this strategy. If you're interested in learning more, visit – [PerformYard.com](https://PerformYard.com) or call (888) 745-0761 to connect with our team.**