



Transforming ineffective performance review process

Affiliates Management Company (AMC) is a wholly-owned holding company of the Iowa Credit Union League (ICUL). Established to better integrate and align ICUL's four operating companies, AMC creates efficiencies that improve the delivery of products and services to members and clients. In 2011, AMC was named a "Top Workplace" by The Des Moines Register, an award based on employee surveys.

AMC's performance review process relied on an antiquated system, a "one and done" process that was incredibly cumbersome and didn't allow for a true view of performance across the organization. "We needed a way to see across our portfolio of employees and understand more about our staff. This wasn't going to happen with our current review process," said Robyn Dennis, organizational effectiveness manager for AMC.

Why PiiQ by Cornerstone

In the search for a performance management system, AMC sent out an RFP to three companies. According to Dennis, criteria were strict, "We specifically wanted a system geared toward small businesses, one with under 300 employees. We didn't need anything complex. Because we primarily use development, not disciplinary action, to address underperformance, it was also important that the system have the capability to integrate with learning."

For AMC, PiiQ's performance management solution was the obvious choice. "PiiQ's solution had a different look and feel from the beginning," said Dennis. "We liked that it was very easy to use and that employees could use it with minimal training." AMC's first impression proved to be correct, as employee

Performance

Industry: Financial and Insurance

Region: Global

Employees: 240

Live Since: 2010

Business Impact: Improved review process, gained performance insight, aligned employees' roles to company success





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- Robyn Dennis, organizational effectiveness manager, Affiliates Management Company

usage was high from the start. “Employees found it easy to use right away. They really took to it.”

During implementation, PiiQ client care worked one-on-one with AMC. “Our client care rep was amazing. I can’t really say enough about how fabulous she was,” said Dennis. “Making the decision to work with her was one of the best things we did. She knew the system inside and out, and she knew the HR challenges we were facing and how to address them.”

The Results

Created a more strategic, continuous performance management process. Employees and managers are now working together to create more relevant short-term and long-term goals that are aligned with organizational goals. “We weren’t measuring goals before. We just had a ‘one and done’ review process based on their job description,” said Dennis. “Now we have more continuous performance management, and it’s making a difference. Employees know what goals they’re being measured on. People are paying attention to defined behavioral traits needed to be successful in their position.”

Delivered clearer performance feedback to employees. AMC leaders can establish competencies and goals, critical to giving

employees clear direction. “With the performance management solution, we can let someone know why they were rated the way they were,” said Dennis. “There are no surprises, and employees have the opportunity to work on their performance with attainable, measurable activities.”

Gained performance visibility. AMC relies on the analytics grid to see across the entire organization, which in turn helps drive succession and strategy decisions. “I really like the 9-box talent matrix. Our leaders can see the overall performance of their staff from a talent perspective,” said Dennis. “I like the competencies and how you can click for a tip on an area of improvement. We use that if a manager is having a performance problem. It gives us insight into how to leverage individual and team strengths and provides performance improvement ideas.”

Illuminated the importance of employee roles in relation to organizational success. With PiiQ, AMC leaders help employees understand the role they play in creating a successful business. This is important for cultivating employee engagement, as well as improving performance over time. “Employees can now see how they connect to the overall success of the organization,” said Dennis. “This helps us achieve our organizational goals more efficiently and ensures our employees are empowered to do their best job.”



Cornerstone is committed to helping small to medium-sized businesses develop an engaged workforce to drive higher performance and revenue. smb.cornerstoneondemand.com

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