



quadrangle

## SMALL BUSINESSES: HOW CULTURE AND PERFORMANCE MANAGEMENT CAN INFLUENCE EFFECTIVE GROWTH

### Executive Summary

Often the hardest work involved in establishing a successful business is creating solid roots to support long term growth.

Award Winning Research Consultancy, Quadrangle are focused on growing a sustainable business that offers research services to some of the world's most prestigious brands.

An organisation well known for their commercial acumen, they are winners of the 2015 AURA 'Agency of the Year' as well as their 'Commercial Context' Award, for the third time in five years.

They know that expertise and experience are key when selecting business partners. When the business experienced rapid growth, they chose a partner with a reputation for delivering results. They selected Transcend to build a system that helped them develop staff effectively within the context of their expanding business.

### Clear project objectives

A key part of working in partnership effectively with an external organisation was to set clear project objectives. For Quadrangle, these were:

- Maintain **regular appraisals** whilst **improving record keeping**
- Allow staff to **reflect on past performance** and **collect feedback**
- Keep consistency with **established beliefs and expectations**
- **Build a development plan** for each employee and embed this into the performance process.



**Culture**



**Performance**

## Challenges

Quadrangle had been a successful small business for many years but, like other organisations that grow organically, there was an increasing need for more robust people processes as the staff team expanded. Whilst the business did have regular team and management appraisals, there was no consistency or written process in place to track progress, develop skills and reward staff.

Following a period of very rapid growth, with the business doubling in size over a 3-year period, it became clear that in order to drive further growth in the desired direction, a more formalised approach was needed to develop a sustainable workforce.

This would ensure the business had the right skills and capabilities for the future.

## Meeting the needs of a growing business

Having grown organically, staff were often fulfilling multiple functions within roles that have evolved over time. Quadrangle needed to ensure that staff stayed motivated through the transition to a more formalised performance management system along with managing the inevitable streamlining of roles.

Transcend were selected for their ability to track individual performance progress, recognise contributions to the wider organisation and provide a clear process for career development discussions.

Despite some complex requirements, Quadrangle also wanted a system that was easy to use to ensure people remained engaged.

## Three-stage project

The project had 3 stages, each supported by the right technology and an experienced consultant

1. Defining the new organisation and capabilities
2. Processes for performance assessment and management
3. Consistent training and development

*"For a relatively small business that was growing rapidly, we needed the right partner. The key for us was developing a simple framework around a set of preferred behaviours that enabled us to track performance and motivate staff.*

*Our desire to find a trusted partner that was able to respond quickly, adapt their solution for our business and not just simply take it out of a box meant that we needed to choose carefully.*

*Transcend had a good reputation and were known to the management team. They offered an established solution that was flexible enough to be customised to our needs. In addition, their consulting team provided relevant support throughout the process, demonstrating good understanding of our business needs from the outset.*

*Ali Sargeant, Director of HR*

## Trust and Partnership

Key management members had experience of working with the Transcend team in previous roles – they knew the organisation had the capability to support a 360-degree review process and incorporate the other requirements into a bespoke solution.

*As Ali Sargeant says, “It was important to have a trusted supplier who would offer a quick response and honest support. That this was backed up by intuitive technology, together with solid customer service and support that made Transcend the obvious choice.”*

It was a significant investment for a small business and so senior stakeholders were involved from the outset observing the success of the project and its impact on the company.

## The right roots

The initial stage of the project was focused on building a performance development review (PDR) process that addressed Quadrangle’s objectives.

It began with a facilitated workshop to help everyone involved in the project understand the current situation and the objectives for the business and how it fed into the bigger picture.

Developing the right solution for Quadrangle meant clarifying both the content of the reviews and also the process for ensuring that the meetings happened and were managed properly.

## Planning and process

This focused on reviewing cultural and commercial expectations, ensuring that these were reflected in the proposed PDR processes. This was reliant on the experience of Transcend for insights into how it would work in practice.

Transparency and record keeping were crucial - sharing information electronically was great at meeting these needs. It also helped to facilitate better discussion and instil discipline and consistency across the management population.

### ALIGNING EMPLOYEE & BUSINESS EXPECTATIONS

What you expect of, and should therefore measure in, employee performance must be core to the way you want to be perceived as a business.

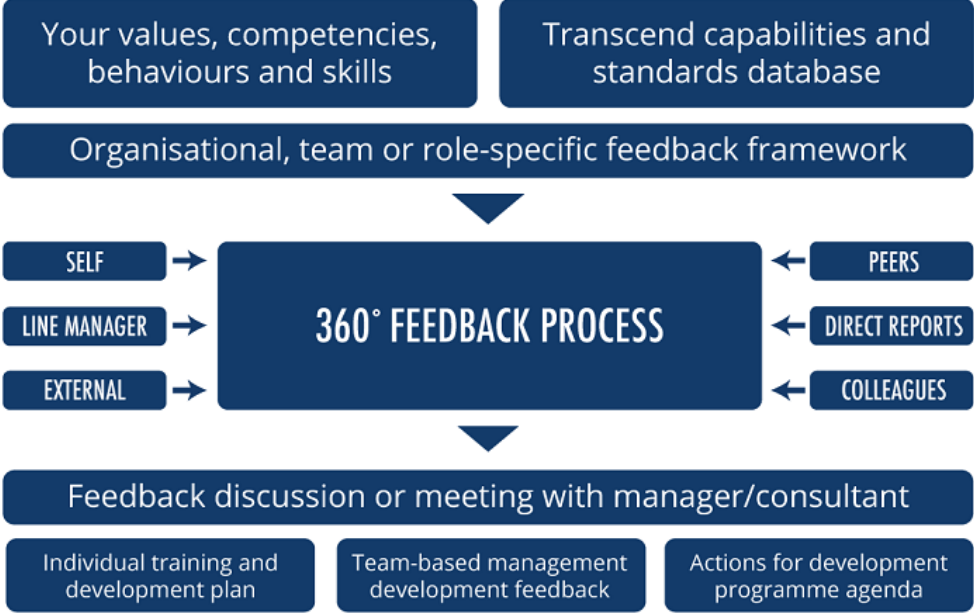
What is critical is understanding how you want employees to feel and behave.

As a forward-thinking, commercially minded and customer centric consultancy, the expectations that Quadrangle has of staff are to:

- think
- learn
- be commercial
- create and deliver value
- enjoy people
- use the whole person
- stretch yourself
- go for it!

**360 degree feedback**

*360-degree feedback typically comes from line manager, subordinates, colleagues, external sources as well as a self-evaluation. By expanding the pool of feedback, you get a more balanced picture of a person's skills and performance from different perspectives. You also gain additional insight into working relationships, compared to more traditional one-to-one arrangements.*



## Content

A formalised appraisal process ensured that everyone understood what was expected of them and were given the time to prepare properly. This led to better communication, more productive discussions and meetings that were more professional.

After putting steps in place to ensure everyone planned properly, it was vital that the content of each assessment was meeting the needs of individuals as well as the business.

The format of the PDR was constructed using the experience of Transcend as a baseline. It was then customised to reflect the culture and structure of Quadrangle as an organisation. Each PDR is divided in to 3 parts:

1. **Organisational Expectations.** Core behavioural elements that everyone needs to demonstrate. This includes attributes such as commercial acumen, learning and delivering value.
2. **Competencies.** The second part is dependent on the individual's position within the organisation.
  - Staff are rated on a set of core competencies, which everyone is expected to show and includes working effectively on projects, completing timesheets on time and spotting commercial opportunities.
  - Partners, Team Managers, Team Leaders are rated for specific competencies related to their responsibilities as managers. These include creating a positive team environment, understanding and responding to client priorities and budgeting projects accurately.

3. **Commentary and Feedback.** The final element is for staff and managers to provide feedback and comments on areas such as organisational beliefs, achievements and development needs. This isn't rated but gives the opportunity for free-text communication.

Throughout the PDR design process, regular feedback and honest insights were provided by the consulting team. Automation of key elements of the process, visibility of data and reliable management information all contributed to a successful solution being designed and implemented.

## People supporting success

The project has resulted in a robust performance management process that has underpinned the company's continued growth with a collaborative team of individuals focused on the business objectives. The positive impact has been across 3 main areas:

### STAFF PROGRESSION

The consistent and structured approach to performance has meant that all staff understand the company culture and are aware of what is expected of them. They can link their progress and achievements to the overall business plan and update progress at any time. This makes recognising contributions easier and assists in career development discussions that nurture individual skills and enhance the overall business.

### RECRUITMENT

It has also had a positive impact on recruitment – reducing costs because staff turnover is relatively low and giving managers a much clearer understanding of the skills and competencies they are looking for, making the whole process much smoother.

### MORALE and PERFORMANCE

Happy staff are more productive and people that feel valued are happier. The overall process inherently makes people feel well managed and valued, leading to a confident and content team. Using the simple yet scalable online tool ensures expectations are managed and performance is tracked throughout company growth.

Staff know what they need to do, are trained better to do it and rewarded more due to better performance. Managers can deliver feedback in a clear concise manner. This clarity for everyone has resulted in a professional appraisal process and supported staff development more effectively.

*“Working with a company that took the time to understand our business and appreciates the practicalities of working with people made the entire experience so very positive for everyone concerned. We have an exceptionally well managed, productive and professional team that has strengthened our success as an agency. The combination of tools and consulting expertise from the team at Transcend meant we had a true advocate and partner for the project.” Ali Sargeant, HR Director*



### Measure

Assess current performance management processes and effectiveness



### Understand

Facilitate a process for ongoing performance management



### Improve

Administer assessments and reviews and track progress

TRANSCEND OFFERS A BLEND OF TOOLS AND SERVICES TO HELP YOU MEASURE, UNDERSTAND & IMPROVE STAFF PERFORMANCE AND DEVELOPMENT IN TIMES OF CHANGE.

WITH A FLEXIBLE RANGE OF CUSTOMISABLE SOLUTIONS AND SIGNIFICANT EXPERIENCE WITH LOCAL AUTHORITIES, TECHNOLOGY BECOMES AN ENABLER SUPPORTED BY EXPERTISE & EXPERIENCE TO ADDRESS YOUR CHALLENGES. THE RESULT IS AN ORGANISATIONAL CULTURE THAT CREATES AND MAINTAINS HIGH PERFORMING TEAMS.

- OUR CULTURE TOOL ALLOWS YOU TO DESIGN ROADMAPS FOR TEAMS, INDIVIDUALS OR THE ENTIRE DEPARTMENT TO ACHIEVE A DESIRED WORKING CULTURE OR PERFORMANCE TARGETS.
- OUR PERFORMANCE TOOL THEN ALLOWS YOU TO TRANSLATE THIS CULTURE INTO EXPECTED BEHAVIOURS & EMBED THEM INTO ONGOING PERFORMANCE & DEVELOPMENT OF ALL STAFF.

YOU CAN ALSO MAKE USE OF FURTHER SOLUTIONS OVER TIME FOR A BROADER SOLUTION IF REQUIRED.

**FOR MORE INFORMATION, PLEASE CONTACT US:**

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