

oneAdvanced

CASE STUDY

CIM: From painful paper process to a better coaching model

With Sarah Lee-Boone, Director of
People & Organisational Development

The logo for The Chartered Institute of Marketing (CIM) is displayed in a white circle. It consists of the letters 'CIM' in a blue, sans-serif font. The 'C' is a simple outline, while the 'I' and 'M' are solid. The 'I' has a thin vertical line to its right, and the 'M' has a thin vertical line to its left, creating a stylized, spaced-out appearance.

CIM

The Chartered
Institute of Marketing



The challenge

For over 100 years, The Chartered Institute of Marketing (CIM) has supported, represented, and developed marketers and the profession as the world's leading professional marketing body. Their mission is to create marketing advantage for the benefit of professionals, business, and society.

However, when The Chartered Institute of Marketing (CIM) first started its transformation programme back in 2016, it identified that its then-current performance management approach was not capable of supporting the organisational change and growth that formed an integral part of the overall business strategy. Staff surveys had indicated that employees were unhappy with the existing scheme and wanted more regular input into their performance and development. CIM initially introduced a plan of regular one-to-ones and feedback in 2016 but quickly found that they were unable to measure progress or ensure a consistent approach that was aligned to the business objectives. The system was paper based, admin heavy and did not seem to be inspiring managers to really engage with their teams on a deeper level.





Why OneAdvanced?

CIM's Associate Director of People, Sarah Lee-Boone, recognised the importance of regular and meaningful performance conversations to truly make a difference. Specifically, she understood that CIM needed higher levels of communication and frequent opportunities for teams to give and receive feedback, in order to drive an organisational shift that would support more agility and continuous development.

This would be a big change for managers and team leaders, but Sarah knew that it would strengthen their organisation, so ownership and empowerment would be key to success for this project. They had to have a solution that people really understood, bought into, and could be easily embedded into their existing workplace culture.

That's where our performance management solution came in. Sarah had been aware of Performance & Talent for a while and researched the product thoroughly, and the alignment was a perfect fit. With years of experience working with people management teams, the foundations for our system were built on the need to facilitate three main elements: quality conversations, real-time feedback and near-term performance and personal development goals. When seeing the software in action CIM quickly concluded that it was the right product for them: a light and simple digital framework to support and enable their new people management approach.





“Performance & Talent is a really effective product. It’s extremely simple, which means we can focus on helping people focus on the personal development aspect, rather than training people on the system itself. It’s also extremely cost effective for the value we get from it. That’s largely because the system has the core of what we need, without loads of extras that are not relevant to us. Finally, it’s incredibly easy to implement and manage from an administration perspective.”

On OneAdvanced’s performance management software, Sarah said



The Result

The impact of the change has been huge for CIM, with the new approach empowering managers to have more meaningful relationships with their teams in a more open, one-to-one way. 77% of CIM people now have more regular, quarterly check-ins and in Sarah's words:

“The organisation has undergone a significant period of transition and I can honestly say that with-out our new performance coaching model, aided by Performance & Talent, we would not have been able to achieve what we have. Performance & Talent has become integral to our people management strategy and has become the central place for manager/ employee conversation, feedback and performance focus. It's about building trust and empowering employees, and we're now really managing to achieve that. Managers don't feel like they're being policed, and we've got more purpose and alignment than we've ever had before.”

On discussing some of their previous challenges, Sarah said:

“Previously, we had introduced a concept of people management with a paper supported system. Although it meant that many meaningful discussions were taking place, we could not extract any data to demonstrate or track this.”

With CIM's core project of engagement and alignment going well, the next issue that they wanted to tackle was data generation and visibility of what is happening from a performance perspective. The reports that can be extracted through the software provide real time information on who is and isn't having performance conversations, where feedback is and isn't being provided and the split between positive vs constructive, as well as the ability to see the how many goals are being set, broken down by team and division. This data has allowed for a simple but insightful KPI dashboard to be built, which is regularly viewed by senior management, right up to Board level.

“We're excited about how far we've come. However, it's important to remember that building a high-performance coaching culture is an ever-evolving project, not a final destination.”



Advice for those shifting away from annual appraisals

- **It's important to focus on the 'Why' as much as the 'How'.** The system is very intuitive and the need for system training is minimal. However, this is a big shift in culture for many organisations and it is important have a clear purpose about where you're aiming to get to, as this affects the way you bring about meaningful, long-term change.
- **Align to the business strategy and the key stakeholders' agendas.** Focus on where the business is going and show clear links between how a more agile and focused approach to performance management will help deliver on the organisational goals.
- **Talk to people.** Senior stakeholders, your HR team, but most importantly the management and employee population. Ask questions so you can continue to understand your challenges as a business. You can summarise core themes and feed them back internally to and build your platform. Employee engagement surveys are also a great way to gather insight.
- **Managers want details.** A great way of articulating the 'how' is by getting showing them what Performance & Talent model looks like in reality. This demystifies the process and proves that you're looking to make things easier, not demanding more administrative effort.


Performance & Talent is an intuitive people management system that helps businesses to transform their employee experience and create a high-performance company culture. Our goal is to improve communication, engagement, and wellbeing to result in a happier and more productive workforce. We understand the key challenges of our customers when it comes to delivering a first-class people experience and continually support them with tackling common organisational issues around annual appraisals, supporting their workforce, boosting employee engagement, unlocking key people management data insights in their organisation and realigning business strategy.



Powering the world of work

This is more than just performance management software. Find out more about the powerful features that sit within OneAdvanced's Performance & Talent software.

Get in touch

 +44(0) 330 343 4000

 www.oneadvanced.com

 hello@oneadvanced.com