

Performance management

The only resource you need to get started
with performance management

How to retain and motivate your employees with performance reviews *the beginner-friendly guide*



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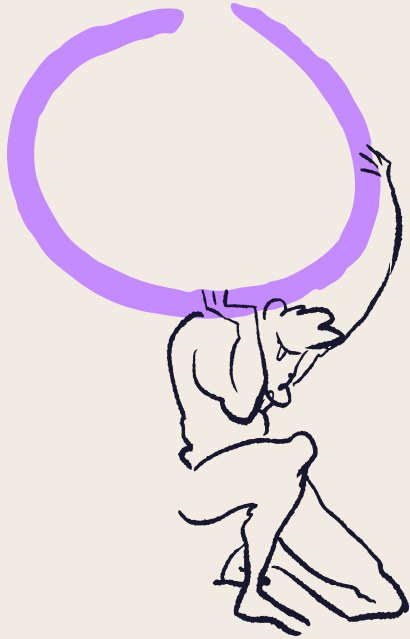




1.

Taking the first step

Taking the first step



Performance reviews help your team members identify challenges, figure out their goals, and reach their full potential. Smart business owners know the value of regular reviews, but putting that into practice in a small business isn't always easy.

We know from experience that there are can be many obstacles in the way, such as:

- Not knowing **where to start**
- **Being overwhelmed** by questions, processes, and workflows
- Trying different forms and techniques, **but none of them are quite right**
- **Lack of experience**, knowledge, or confidence
- **Trying to transition** from an existing performance framework
- **Reluctance from team members** to engage with the process
- Knowing **performance reviews are a must-have**, but having no time to run them

It's tempting to find a list of questions online, set up a meeting, run your annual reviews, and think that's the end of it. But this box-ticking approach is why so many people dislike the idea of performance reviews in the first place.

In a small business, every individual matters. If you want your talented employees to stick around, they need to feel supported, encouraged, and enabled to work at their best. You need an approach to performance management that empowers your team members and is easy to manage.

At Charlie, we've built performance management software that's simple and easy to use. It's completely beginner-friendly, with templates and workflows to get started quickly. As you grow and get comfortable running reviews, there's enough customisation options and features to tailor the system to exactly how you like to work.

While we can't remove every roadblock in your way, **we can give you the tools and resources you need to run effective performance reviews** — even if it's your first time. In this guide, we're sharing our best advice on how to approach performance management in a small business, so you can get started on the right track as quickly as possible.



2.

Performance
management =
motivated teams



"No one wins when I am spending hours on admin tasks every week. With Charlie, I get more time back in my day to focus on what I love — working closely with the team to help them grow."

James Gill
CEO of GoSquared

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Performance management gets a bad rep. Done badly, performance reviews are often pointless, underwhelming, or even anxiety-inducing. But when they're used effectively in a small business, performance reviews are an opportunity for conversation, goal-setting, and growth.

With only 41% of people reporting they feel inspired at work, keeping employees motivated is a challenge — but it's one that performance management can help overcome.

Performance management allows you to:

- Set, track, and achieve goals
- Recognise and celebrate success
- Identify and address performance challenges early
- Give regular feedback to team members
- Inspire motivation within individuals and teams
- Add structure and remove bias when it comes to promotions
- Demonstrate you're a good employer to potential candidates
- Foster a feedback culture
- Show existing employees that you're committed to their growth

Running a regular performance review process takes time and energy to set up, but it saves you time in the long run. Without one, performance issues go unchallenged and high-performers don't get the recognition they deserve.

Taking control of performance management helps you identify challenges early, support your employees to develop and grow, and retain your most talented team members for the long haul.



"Having performance reviews within the software is brilliant. It's great to be able to come back to past check-ins, but it also takes away the fear of irregular 1 to 1's as it's just become part of our routine."

James Chessum
Founder @ Red5 people

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3.

How automation can help

Say goodbye to manual reviews

Book a demo

Most small business leaders we know want to run better performance reviews, but just don't have the time or headspace to dedicate to it. And this problem only gets worse as your team grows. Luckily, it's a challenge we can help you tackle with the help of the right tools and automation.

Switching from manual reviews to automated performance management:

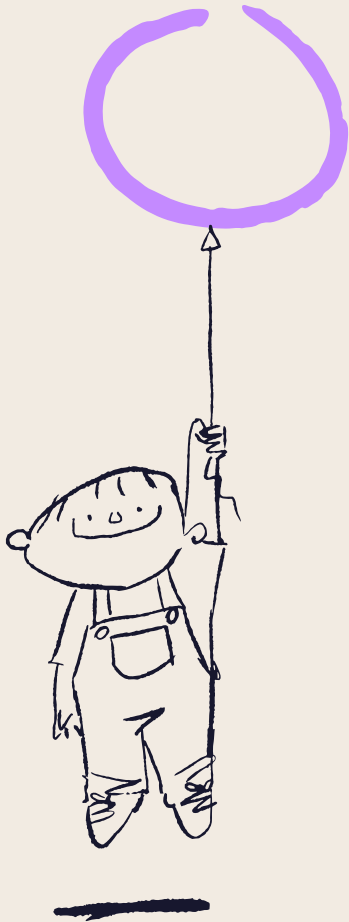
- **Saves you valuable time** and energy
- Gives you **one place to store all your notes** and decisions
- Allows you to **reflect back on previous reviews**
- **Simplifies the behind-the-scenes** admin process
- Gives you access to **easy-to-use templates** and prompts
- Makes it easy to integrate **360-degree feedback**
- Helps to **remove bias and improve inclusivity**
- Allows you to **run performance reviews more regularly**
- Helps you **look more professional**

And these are just the benefits when it comes to running the reviews themselves. The bonus impact on your employees is even better.

No performance reviews	With automated performance reviews
No goals, feeling lost	Specific goals, motivated to succeed
No personal development support	Encouraged to pursue personal growth
Disengaged, with poor opinion of performance reviews	Highly engaged, with an understanding of the positive impact of reviews
Struggling to see a future career path	Clear goals and milestones towards promotion
Having to ask for feedback	Feedback given on a regular basis

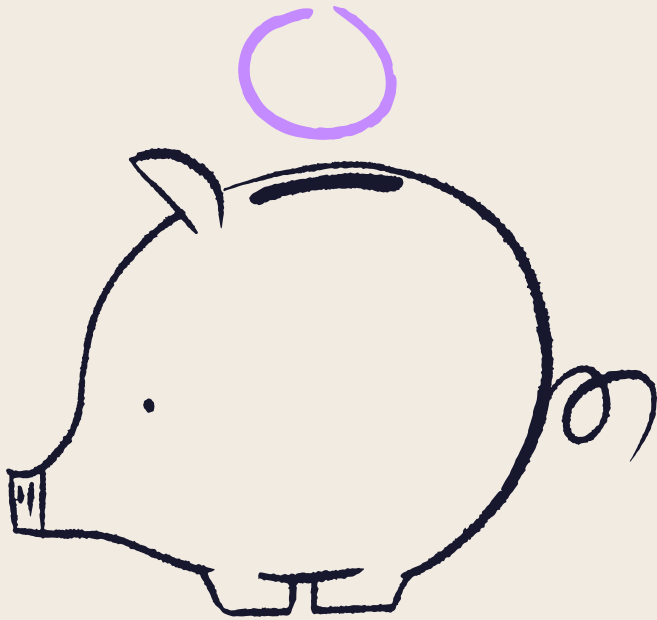
“I’m blown away by how useful Charlie’s Reviews has been. It’s enabled some really high-quality conversations within our team that I know just wouldn’t have happened otherwise.”

Chris Wallis
CEO and co-founder @ Intruder



4.

Getting started with automated performance reviews



At Charlie, we've thought long and hard about performance reviews. They're a central part of our career progression framework, and have been since the early days. We've seen higher engagement and motivation as a result.

We're firm believers that you're never too new or small to show a commitment to growth and development — and that's why we built a performance management feature just for small businesses.

No more trial and error, and no need to be an expert on all things performance related.

Here's how you can get started today with Charlie:

1. Reviews arranged: Automatically schedule a review and deadlines for both the manager and team member
2. Team member gives feedback: Respond to prompts and submit feedback

3. Manager gives feedback: Line manager responds to the same prompts separately
4. Coworkers give feedback (optional): team members respond to questions to add a more holistic view
5. Feedback discussion: Team member and manager meet to discuss the feedback together
6. Record outcomes: Manager takes notes and records key actions and decisions

It's quick, easy, and ideal for beginners.

Check out all of our customer stories and learn how Charlie can help you too

Customer stories



charlie.



5.

How small businesses
make the most
of performance
management

Empowering growth

Every day, small businesses like yours use Charlie to automate their performance review process. Let's hear from a handful of leaders on the impact this has on their business.



Industry: Public health
Team size: 42
Charlie users since: 2018
Main challenge: centralising all HR tasks in one place

Benefits of using Charlie:

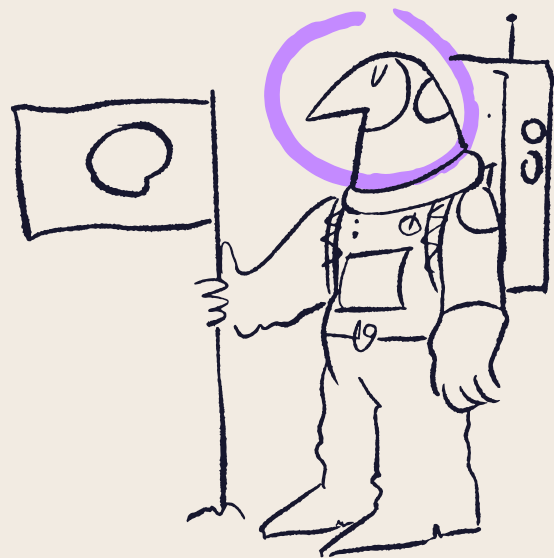
- **Time-saving:** The team now saves 50 hours per week compared to before, giving them time back to spend on more high-value tasks.
- **Focus on growth:** Introducing a new performance review system enabled the team at Daye to shine a spotlight on growth and development.



"Our favourite feature has to be the performance reviews one. Since the 360-feedback tool has been added, we can simply do all of what we want in the software. It couldn't be any easier, and it also gives us the opportunity to really focus on our team's growth."

Valentina Milanova
CEO & Founder @ Daye

[Read case study](#)



Easy to use

Let's dive a little bit more into how our customers have been using Charlie for their time off management process, so you can see for yourself the benefits of using Charlie as a small company.



Industry: PR
Team size: 6
Charlie users since: 2023
Main challenge: finding an easier system for performance reviews

Benefits of using Charlie:

- **Easy setup:** The team at Lem-uhn found the process of setting up performance reviews easy for everyone involved.
- **Built-in templates:** Team members can use templates for inspiration, or select custom questions that relate to the company's review criteria.



"It helped a lot and was a great tool for us to put together a performance review system that made sense."

Riannon Palmer
Founder & CEO @ Lem-uhn

[Read case study](#)





6.

So, what's the
next step?

Make the right choice



When you step back and think about it, you've got three options when it comes to performance management:

1. Do nothing — and risk losing talented team members
2. Choose a manual process — and struggle to keep up
3. Automate your performance management — and handle reviews seamlessly

We definitely don't recommend the first option, and the second one is only realistic if you have plenty of spare time, which is a precious resource as a small business leader.

That only leaves one realistic option — automated performance management. And we have just the software to help.

Charlie makes it easy to set up and automate your performance review process, with no experience necessary.

- **Simple review builder:** Get started in minutes
- **Built-in templates:** Use templates designed by experts
- **Automated launch:** Roll out recurring reviews automatically
- **Automatic reminders:** Encourage completion with helpful nudges
- **Peer-to-peer feedback:** Invite colleagues to share feedback for a more holistic view
- **Simple dashboard:** Oversee progress from one place

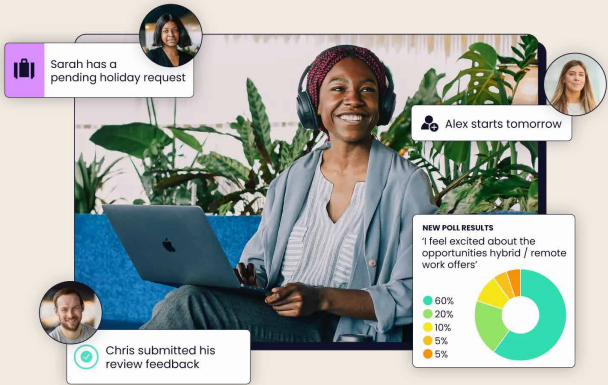
To find out more, [book a demo](#) with one of our experts. They can give you a full tour of CharlieHR and explore how it can help you manage performance reviews seamlessly.

Ready to get started?



CharlieHR

- ✓ No HR experience needed
- ✓ Effortless
- ✓ Easy to use



Book a free call today

Chat with Josh, our HR software expert

- ✓ 30 minutes tops
- ✓ Full platform tour

Book a demo