



Taking Notes in Trakstar

Effective performance reviews are all about detail. The more relevant information you share with an employee, the more they'll understand how they can get better at their job and see the value in the work they contribute.

Trakstar makes it easy to capture and record specific feedback with our note-taking feature. In this short guide, we'll teach you how the simple act of adding notes will make a big impact on your organization's performance review process.

The benefits of taking notes in Trakstar

Let's jump in by looking at the advantages of using our note-taking feature:

- ❖ **Makes for deeper, more specific performance reviews** – Notes give context to performance, while supporting competency ratings and creating discussion points for conversations between managers and employees.
- ❖ **Brings more voices to the evaluation process** – Employees higher up the reporting structure can leave notes, allowing for a department head or team lead to provide input.
- ❖ **Promotes ongoing feedback** – Employees want to know how they're performing and notes facilitate consistent feedback.
- ❖ **Reduces recency bias** – Reviews too often focus on the employee's most recent successes and failures but collecting notes throughout the evaluation cycle ensures everything is covered.
- ❖ **Reduces completion time** – Relevant notes make completing an employee's evaluation a breeze since much of the necessary information is already in Trakstar.

In the first year of using Trakstar, it takes about 90 minutes for a manager to complete a single employee review. That timeframe falls to about an hour in year two and 30 minutes in year three, as the process is refined and users get acquainted with the solution.

Your organization will get off on the right foot by utilizing the note-taking feature from the start. You'll not only avoid many of the growing pains that prolong the review process. You'll also provide employees quality evaluations from implementation.

Note taking use cases

Now let's look at the specific situations it makes sense to collect notes:

Managers can add notes on direct reports

The note-taking feature is primarily for managers to provide feedback and collect thoughts on their direct reports.

- ❖ **Document 1-on-1 meetings** – Summarizing 1-on-1's makes for effective ongoing feedback that culminates in a detailed performance review. It also allows managers to document any standout points from these conversations and revisit them later (e.g. personal issues outside of work or challenges related to a specific aspect of the job).
- ❖ **Keep track of employee accomplishments** – Adding a note after an employee hits a major milestone (e.g. Chris finished a big project ahead of schedule) ensures nothing falls through the cracks when it comes time to discuss their performance.
- ❖ **Record employee issues** – Managers can document an ongoing problem with an employee (e.g. poor attitude or attendance issue) so they remember to monitor the issue and act if it continues. They'll also have a track record of examples they can cite if it becomes necessary to discuss the problem with the employee.

As your organization rollouts 360-degree reviews, collect feedback on the process from the raters who participate. You can improve questions going forward so the assessments continuously become more effective.

Trakstar admins can schedule note requests

Admins can request notes by scheduling emails that are sent to managers at certain points in the performance review cycle. Each email can focus on a different competency or theme, resulting in in-depth employee evaluations. For example, an admin can request notes on a topic like project

management and pose specific questions that result in detailed feedback (e.g. “what went well, what didn’t, and how did you measure project management effectiveness for the employee?”)

Additionally, admins can request notes by creating a custom message that is presented to a manager on the Trakstar homepage when they log in.

Employees can leave notes on colleagues outside of their reporting structure

The note-taking feature is a great way for an employee to give praise to a teammate or colleague. This feedback makes for more well-rounded evaluations since managers don’t always see how a direct report interacts and collaborates with their peers.

This use case is especially beneficial for three types of organizations:

- ❖ Organizations that don’t have primary managers (e.g. dotted-line managers or consulting firms).
- ❖ “Younger” organizations of Millennials and Gen Zers that encourage open discourse among employees.
- ❖ Organizations where interdepartmental work is common.

Employees can add notes on themselves

Employees can write notes on strides they’ve made toward the competencies they’re rated on or share events in their personal life that may be impacting their performance.

Many organizations are moving to a system where self-appraisal is paramount to the review process, supplementing and enhancing the manager's perspective of performance.

How the notes feature works

Now we'll outline how the note-taking feature works so you can get an idea how it will be used in your organization:

- ❖ An employee's profile lists every competency they're rated on. Notes can be added to a specific competency so feedback is focused and relevant. For instance, the example referenced earlier about Chris finishing a big project early can be added to "work quality" or "work-life balance" depending on how the manager wants to frame their feedback.
- ❖ Notes are time stamped with the date they were added so situations can be properly referenced when it comes time to discuss (e.g. "back in March you were struggling with this project, how are you feeling now?")
- ❖ Notes can be made visible to the employee or kept private. For example, if an employee has had an uncharacteristic behavior change, their manager can leave a private note as a reminder to monitor the issue. Or on a more positive note, a private note can be left about an employee deserving a raise or promotion as their manager seeks approval.

Note taking dos and don'ts

Hopefully, you're excited to make notes part of your organization's evaluation process. We'll leave you with a few tips on how to best take advantage of the feature:

- ❖ Trust employees to use the note-taking feature professionally. Asking questions that result in detailed notes is recommended but otherwise, don't be too prescriptive in how you enforce note-taking procedures.
- ❖ Be mindful of how you use the privacy setting. Trakstar was developed with feedback transparency in mind so be cognizant of why you chose to make a note private.
- ❖ Make sure every note has a purpose. Leaving too many notes or adding ones without a focused thought clutters the system and creates more work later.
- ❖ Despite all the benefits, notes are irrelevant if sensitive feedback isn't properly delivered to the employee.

Improve performance reviews and save time

Diligent note taking is a win-win for both your organization and its employees. The practice promotes evaluations that aren't just a formality but rather a way to share thoughtful, specific feedback with every employee.