

# WHITBREAD

Performance and  
Development  
Reviews

Team Member  
Guide

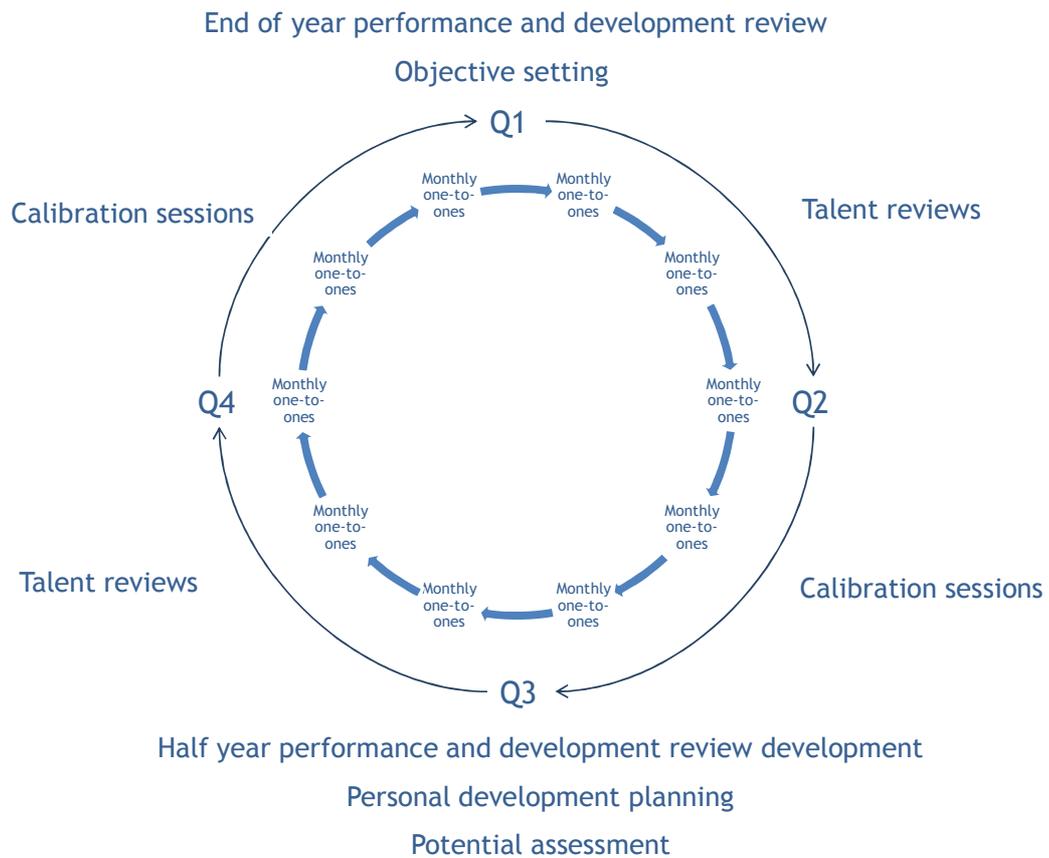


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# The Performance and Potential Cycle

Effective frameworks are in place to measure both the performance and potential of all team members. The cycle below illustrates when each of the key elements in the performance and development review process take place.

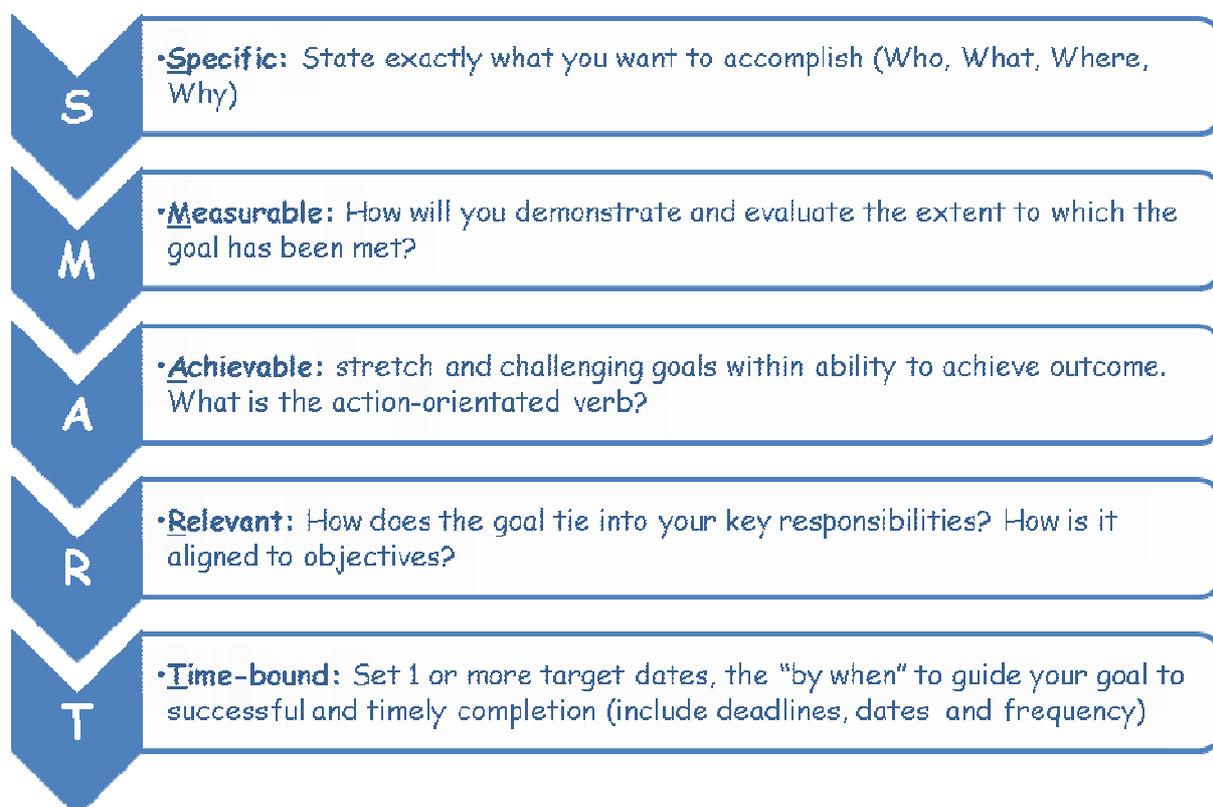


# Objective Setting

Agreeing meaningful objectives with your Line Manager is a critical activity at the start of the new financial year, or within three months of joining the team. Objectives should be aligned to the business plan and the WINcard, but broken down into meaningful chunks so that you understand your contribution and the standards you are expected to perform to. Personal objectives will also be agreed which focus on development areas that may be more behavioural or around learning a new skill.

Meaningful objectives include clear targets that detail 'what will be achieved' and 'how it will be delivered'. Your performance against objectives will be monitored throughout the year in one-to-ones with your Line Manager. You can record and track business objectives on the one-to-one objectives form and personal objectives on the personal development form.

All objectives should be set using the SMART model. As a reminder, SMART objectives should be:



# Personal Development Planning

Development is for everyone; therefore during your performance and development reviews and monthly one-to-ones, you will identify development opportunities. These could be around the 'what' objectives, helping you develop your technical skills or developing your potential for a different role; or around the 'how' developing your positive behaviours. You should record your development areas and what you will do to meet them on the Personal Development Plan.

When considering your team development needs, identify your strongest and weakest areas. Focus on identifying actions that will help you to enhance your performance in your current role and to meet your further aspirations. Development is more than just training so it is important to consider other methods to gain learning experiences.

A high performance culture becomes embedded into the company when individual team members drive their own development and, supported by their Line manager, take steps to improve.

## Monthly One-to-Ones

Monthly meetings are essential to ensure that you are focussed and continue to contribute to business performance. One-to-ones provide you with the opportunity to check progress against personal and business objectives and gain constructive feedback on your performance.

One-to-ones are designed to review progress against objectives, using the completed form as a framework for discussion. They should take place monthly with regular time scheduled and a private space pre-booked.

You should prepare by thinking about what you achieved during the last month and how you achieved it. Review your objectives and personal development plan and bring them to the one-to-one. You need to be able to explain what has gone well, opportunities for improvements and where you need advice or support.

Using the one-to-one objectives form and personal development plan, you should keep meaningful notes which will help action your Line Manager's feedback.

# Calibration for Consistency

Prior to both the half-year and end-of-year performance and development reviews, calibration of performance, potential and talent matrix position ratings are carried out by management and their HR contact. and attend a calibration session. For example, General Managers will review with their Line Manager all team members at their site. These sessions ensure that we are consistent in how we measure performance, potential and readiness for progression across Whitbread. It is essential that we apply our ratings consistently and fairly as they help to inform pay review and incentives. Ratings will not be confirmed to you until after calibration sessions.

## Rating Performance – the ‘What’ and ‘How’

Equal weight is given to both the ‘what’ and the ‘how’ when rating performance, which means that it is just as important that you display the right Whitbread behaviours the ‘how’, as well as delivering against your business objectives or WINcard the ‘what’.

You will have completed either the end-of-year or half-year form prior to the review with your own ratings and a summary of your achievements. Make sure you chose the right form for you as they are based on job roles.

During the review you will discuss with your Line Manager both your comments and their own observations, and agree and overall performance rating.

## **Half-Year Performance and Development Review - September**

At the half-year performance and development review, you will be able to quickly agree progress against objectives as you will have been tracking these in monthly one-to-ones. The main body of the half-year performance and development review will therefore enable you and your Line Manager to spend quality time discussing the personal development necessary to help you to be more effective in your current role and plan development activity to support your career aspirations.

To facilitate this conversation you should use the appropriate guidelines on the "how" (Whitbread Way Forward and/or Leadership Framework) to discuss with your Line Manager your behavioural strengths and development areas.

If you have aspirations to progress within Whitbread, and your Line Manager is in agreement you should also complete the potential assessment using the potential framework, agreeing a potential rating and talent matrix position, as explained later in this guide.

## **End-of-Year Performance and Development Review - March**

For the end-of-year performance and development review, you will follow the same format as the half-year performance and development review, however your end-of-year performance rating should provide a picture of performance across the entire year. You will be able to summarise progress against objectives for the year by reviewing the monthly one-to-one progress against objectives and behaviours.

You will have completed the end-of-year review form with your own ratings and summary of achievement in terms of both the "what" and the "how" prior to the meeting. With your Line Manager you will discuss your overall performance, recognise areas of strength and success, agree on development areas or improvement activity and agree your overall performance rating.

# Applying the performance ratings

The ‘**what**’ are the tangible targets that you have achieved. Rate them from 0-3 dependent on the extent to which all the targets were achieved. A rating is given for the overall achievement of targets, not individual targets.

The ‘what’ performance rating	Description	Examples to illustrate when performance rating may be applied
<b>0 Does not meet objectives</b>	<ul style="list-style-type: none"> <li>• Most objectives either not delivered, delivered below the required standard or have required significant intervention and input from others</li> </ul>	<ul style="list-style-type: none"> <li>• Working to own agenda, not listening or accepting support when needed</li> </ul>
<b>1 Partially meets objectives</b>	<ul style="list-style-type: none"> <li>• Performance is low and does not consistently meet our high standards, with important objectives or targets not achieved</li> <li>• Performance is inconsistent</li> </ul>	<ul style="list-style-type: none"> <li>• Over promising with under delivery</li> <li>• Not being open or asking for help when experiencing difficulties resulting in important objectives not being met</li> </ul>
<b>2 Meets objectives</b>	<ul style="list-style-type: none"> <li>• Delivers a rounded performance against most objectives and all critical performance areas</li> <li>• Performance is consistently positive</li> </ul>	<ul style="list-style-type: none"> <li>• Achieves objectives and produces measurable and valued outputs.</li> <li>• Works efficiently and effectively to deliver results</li> </ul>
<b>3 Exceeds objectives</b>	<ul style="list-style-type: none"> <li>• Consistently delivers a strong performance against all objectives, and delivers results beyond expectations</li> <li>• Regularly contributes over and above the performance requirements of current role</li> </ul>	<ul style="list-style-type: none"> <li>• Plans effectively and always looks for opportunities to deliver over and above what is required</li> <li>• Outputs are comparable to others in more senior roles</li> <li>• Puts the delivery of objectives for the business ahead of own personal objectives</li> </ul>

We rate the ‘**how**’ against the extent to which you demonstrated **all** the key behaviours in achieving your targets, again using a simple 0-3 scale as illustrated below.

The ‘how’ performance rating	Description	Examples to illustrate when performance rating may be applied
<b>0 Did not demonstrate behaviours</b>	<ul style="list-style-type: none"> <li>• Negative examples of behaviour demonstrated with little or no desire to improve</li> </ul>	<ul style="list-style-type: none"> <li>• Working to own agenda, not listening or accepting support when needed</li> <li>• Paying ‘lip service’ to Whitbread Way Forward</li> </ul>
<b>1 Partially demonstrates behaviours</b>	<ul style="list-style-type: none"> <li>• Targets may have been achieved but not by displaying the consistent behaviours</li> <li>• Behaviour is inconsistent</li> </ul>	<ul style="list-style-type: none"> <li>• Not being open or asking for help when experiencing difficulties</li> <li>• Not listening to others</li> </ul>
<b>2 Demonstrates behaviours</b>	<ul style="list-style-type: none"> <li>• Recognises that the behaviours demonstrated in achieving an objective or target also matter not just the result</li> <li>• Behaviour is consistently positive</li> </ul>	<ul style="list-style-type: none"> <li>• Works well with others and demonstrates positive behaviour even when under pressure</li> <li>• Has a ‘can do’ attitude to problem solving and overcomes issues to achieve results</li> </ul>
<b>3 Role model in demonstrating behaviours</b>	<ul style="list-style-type: none"> <li>• Looks for opportunities to add value</li> <li>• Role model for peer group</li> </ul>	<ul style="list-style-type: none"> <li>• Actions and behaviour always reflect the Whitbread Way Forward</li> </ul>

# A Reminder of the Whitbread Way Forward: ‘How’

The Whitbread Way Forward is used to measure behaviours, the ‘how’ for management and team members in all roles.

The Whitbread Way Forward		
<b>Genuine</b>	We really care about customers	<ul style="list-style-type: none"> <li>• Prioritises the needs of internal and external customers, and encourages others to go the ‘extra mile’</li> <li>• Commitment to understanding the needs of others</li> <li>• Promotes a clear vision of ‘excellence’ in customer service, generating a range of methods to motivate others to meet high standards</li> <li>• Communicates effectively to a range of levels, and actively seeks feedback to improve performance</li> <li>• When makes or notices a mistake, knows it’s ok to talk about it</li> <li>• Shares our customers concern for the environment and our communities</li> </ul>
<b>Confident</b>	We strive to be the best at what we do	<ul style="list-style-type: none"> <li>• Consistently exceeds goals and stretches targets</li> <li>• Actively seeks opportunities to collaborate with others to improve ways of working, cross-functionally</li> <li>• Appropriately and effectively challenges the status quo despite potential opposition</li> <li>• Influences others to create a culture of excellence</li> </ul>
<b>Committed</b>	We work hard for each other	<ul style="list-style-type: none"> <li>• Builds strong relationships - encouraging involvement and engagement of others, sharing of ideas, regular communications and open dialogue</li> <li>• Communicates issues openly and honestly, shows personal enthusiasm and desire to win support of others</li> <li>• Builds highly-effective teams and work groups, recognises success and celebrates diversity</li> <li>• Encourages ownership in others and delegating tasks</li> <li>• Demonstrates awareness of roles within teams and delegates to achieve optimal effectiveness for all</li> </ul>

# Leadership Framework

In addition to the Whitbread Way Forward, for some roles, we also measure or assess behaviours, the ‘how’ against the Leadership Framework.

Use for Multi-Site Managers, General Managers, Operations Managers and Support Centre Middle Managers, Senior Leaders and Directors.

<b>We will grow legendary brands by building a strong customer heartbeat and innovating to stay ahead</b>	
<b>Create Whitbread’s Future</b>	<b>Make Bold Decisions</b>
<ul style="list-style-type: none"> <li>• Set ambitious goals</li> <li>• Create space to observe, think and learn</li> <li>• Innovate to stay ahead</li> </ul>	<ul style="list-style-type: none"> <li>• Act on sound analysis</li> <li>• Focus ruthlessly on what is vital</li> <li>• Take risks, and learn from setbacks</li> </ul>
<b>Deliver Great Results</b>	<b>Inspire Confidence and Belief</b>
<ul style="list-style-type: none"> <li>• Turn strategy into action</li> <li>• Embrace accountability</li> <li>• Fight to win</li> </ul>	<ul style="list-style-type: none"> <li>• Paint a compelling picture of the future</li> <li>• Recognise and celebrate success</li> <li>• Connect with people</li> </ul>
<b>Act with Authenticity</b>	<b>Build Exceptional Teams</b>
<ul style="list-style-type: none"> <li>• Be yourself with more skill</li> <li>• Believe in your own value</li> <li>• Consistent in words and deeds</li> </ul>	<ul style="list-style-type: none"> <li>• Select, support and stretch great people</li> <li>• Create conditions for all to flourish</li> <li>• Raise the bar with ‘Tough Love’</li> </ul>

# Overall Performance Rating

This gives you an overall performance rating out of 6 - combining the 'what' and the 'how' ratings.

Overall Performance rating	
0 - 1	Does not meet expectations
2 - 3	Partially meets expectations
4	Meets expectations
5 - 6	Exceeds expectations

Examples:

Meet your objectives and	2
Partially demonstrated the right behaviours	1
	<b>= 3 <i>Partially meets expectations</i></b>

Exceeded your objectives and	3
Role modelled the right behaviours	3
	<b>= 6 <i>Exceeds expectations</i></b>

Did not meet your objectives and	0
Partially demonstrated the right behaviours	1
	<b>= 1 <i>Does not meet expectations</i></b>



# Potential Framework - JDI

Qualities needed to succeed		Positive qualities	Qualities to develop
<b>Judgement</b> Ability to spot issues and opportunities before others, and uses robust analytical rigour to frame situations, issues and opportunities in such a way that new perspectives can be found.	Spotting issues – can quickly detect changes in what is happening to allow issues to be spotted early.	<ul style="list-style-type: none"> <li>• Constantly scans the environment and identifies change</li> <li>• Shrewd sense of relative importance of issues</li> <li>• Anticipates problems and opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Tends to be rooted in the present</li> <li>• Thinking is unclear when making decisions</li> <li>• Resists re-evaluating decisions in the light of contradictory evidence</li> </ul>
	Framing – an effectiveness in conceptualising a situation that allows fresh perspective.	<ul style="list-style-type: none"> <li>• Able to frame and simplify complex situations</li> <li>• Decisions take account of broad implication and practicality</li> <li>• Recognises that views may change in light of changing evidence</li> </ul>	<ul style="list-style-type: none"> <li>• Unable to structure complexity</li> <li>• Preference for dealing with discrete problems rather than framing issues</li> <li>• Discomfort with ambiguity</li> </ul>
	Analytical rigour – effective level of analytical rigour in dealing with complex problems.	<ul style="list-style-type: none"> <li>• Probing and questioning style</li> <li>• Reflective thinking</li> <li>• Balance between decisiveness and reflection</li> </ul>	<ul style="list-style-type: none"> <li>• Making quick decisions without supporting evidence</li> <li>• Overly theoretical</li> <li>• Overly analytical, inhibiting decision making</li> </ul>
<b>Drive</b> A relentless drive to have broad impact rather than just deliver results, with preparedness to question and challenge the status quo, and the self-assurance that enables goals to be achieved.	Sense of ambition – motivated by the desire to leave a mark.	<ul style="list-style-type: none"> <li>• Highly motivated to achieve</li> <li>• Consistently wants more and is dissatisfied with where they are</li> <li>• Skilful in identifying how to achieve career goals</li> </ul>	<ul style="list-style-type: none"> <li>• Waits for direction</li> <li>• Focuses on narrow, tangible objectives</li> <li>• Driven by personal status, rather than desire to achieve</li> </ul>
	Personal initiative – capability to set and pursue a path without guidance.	<ul style="list-style-type: none"> <li>• Self-sufficient</li> <li>• Resourceful</li> <li>• Courageous – challenges the status quo</li> </ul>	<ul style="list-style-type: none"> <li>• Unquestioning, lacking curiosity</li> <li>• Follows rather than leads</li> <li>• Cautious</li> </ul>
	Self assurance – displays a basic confidence in their ability to achieve goals and overcome problems.	<ul style="list-style-type: none"> <li>• Optimistic in the face of obstacles</li> <li>• Prepared to take personal risks</li> <li>• Balanced response to criticism</li> </ul>	<ul style="list-style-type: none"> <li>• Emotional reactions dominate actions</li> <li>• Needing reassurance</li> <li>• Deferential to senior people</li> </ul>
<b>Influence</b> A good understanding of him/herself, knows how to influence the behaviour of other people to achieve goals and get things done.	Self awareness – knows where they can most effectively fit and be effective.	<ul style="list-style-type: none"> <li>• Clear view of strengths and weaknesses</li> <li>• Appreciates what environments they suit</li> <li>• Receptive to feedback and seeks to develop to increase impact</li> </ul>	<ul style="list-style-type: none"> <li>• Unaware of impact</li> <li>• Not open to feedback</li> <li>• Unquestioning of self</li> </ul>
	Environmental radar – knows how to get things done in the organisation.	<ul style="list-style-type: none"> <li>• Excellent insight into how to get things done</li> <li>• Knows who they need to influence and their agenda</li> <li>• Politically aware - understands the dynamic they operate in</li> </ul>	<ul style="list-style-type: none"> <li>• No demonstration of how to mobilise action</li> <li>• Misjudges political process</li> <li>• Unsophisticated when engaging others</li> </ul>
	Range of influence – knows how to influence different people effectively and judge different situations.	<ul style="list-style-type: none"> <li>• Politically skilled</li> <li>• Able to deploy a range of influencing styles</li> <li>• Persuasive, credible, and builds strong relationships</li> </ul>	<ul style="list-style-type: none"> <li>• Narrow range of influencing skills</li> <li>• Relies on the tried and tested</li> <li>• Misjudges people and their views</li> </ul>

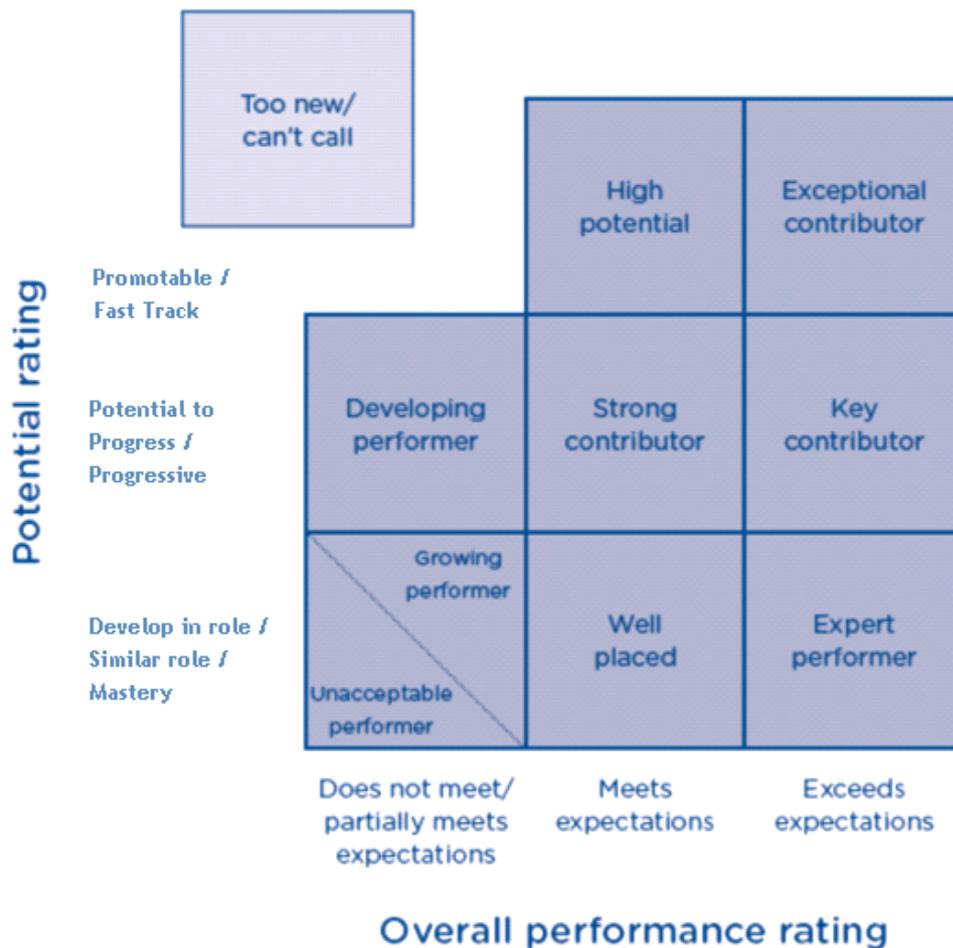
# Potential Ratings

Using the indicators in the framework, you will determine one of the following potential ratings:

Judgement, drive, influence	Description	Potential rating
Overall judgement, drive and influence demonstrated at the degree typically expected for their grade and/or role, a number of development areas as well as some positive qualities.	<ul style="list-style-type: none"> <li>• Knows current role well and will look to enhance their current skills</li> <li>• Likely to develop in current role or a similar role for the foreseeable future</li> <li>• Is happy where they are without the desire or potential to progress to the next grade</li> </ul>	<b>Develop in role / Similar role / Mastery</b>
Demonstrates positive examples against most of the judgement, drive and influence qualities, with only a few developmental areas which are actively being built on through a personal development plan.	<ul style="list-style-type: none"> <li>• Has the ability to progress</li> <li>• For Multi-site Managers/Support Centre to a larger role with more responsibility and business impact at the same grade. Potential to move to the next grade with focused support within three to five years</li> <li>• For WHR site management/site team members to a similar role with significantly bigger responsibility and business impact. Potential to move to the next level role with focused support within two years plus</li> <li>• Has the motivation to progress their career</li> </ul>	<b>Potential to Progress / Progressive</b>
Role models the qualities of judgement, drive and influence and is demonstrating these with a degree of skill much higher than expected from their current grade and/or role.	<ul style="list-style-type: none"> <li>• For Multi-site Managers/Support Centre consistently demonstrates the capability to operate at a grade higher within the next two years</li> <li>• For WHR site management/site team members consistently demonstrates the capability to operate in the next level role within the next one to two years</li> <li>• Has the desire to progress and would seriously consider opportunities as presented</li> </ul>	<b>Promotable / Fast Track</b>

# The Talent Matrix

Once the performance and potential ratings have been determined, these will correspond to a position on the talent matrix. For example, a overall performance rating of 'meets expectations' and a potential rating of 'potential to progress' will equate to a talent matrix position of 'strong contributor'.



## Summary

You should now have all the information you need in order to have regular discussions with your Line Manager to agree individual objectives, review your performance and compile a personal development plan – everything you need to know to maximise your performance and potential.

Further information and supporting documents are available on the intranet or from your HR contact.

# Glossary of Terms

**Calibration Session** – managers' discussions to share their thinking and ensure we are consistent and fair in how we measure performance, potential and readiness for progression.

**End-of-Year Performance and Development Review** – conversations with your individual team members about their objectives, performance and development.

**Half-Year Performance and Development Review** - – conversations with your individual team members about their objectives, performance and development.

**Leadership Framework** – a listing of leadership behaviours.

**Objective Setting** – agreeing meaningful business and personal objectives aligned to the business plan and personal development areas.

**One-to-Ones** – monthly meetings between Line Manager and team member to discuss progress on objectives give feedback on performance and update personal development plan.

**Overall Performance Rating** – total of both the 'what' (objectives) and 'how' (behaviours) performance ratings.

**Performance and Development Reviews** - process designed to drive a high performance culture and supporting everyone in maximising their performance and potential.

**Performance and Potential Cycle** – illustrates when each of the key elements in the performance and development reviews take place.

**Performance Ratings** – ratings given by both the team member and Line Manager against the 'what' (objectives) and 'how' (behaviours).

**Personal Development Plan** – a record of team members' development goals and how they plan to achieve them.

**Potential Framework** - descriptors for judgement, drive and influence (JDI.)

**Potential Rating** – measurement of where team members are on the potential framework.

**Talent Matrix** – a nine box grid with easy to understand classifications of readiness for progression.

**Talent Matrix position profiles** – a series of descriptors, probing questions and actions for each position on the talent matrix.

**Talent Reviews** – senior manager's twice yearly review of talent within the business.

**Whitbread way forward** – Company values.



