Client story

CHANGING PERFORMANCE MANAGEMENT PROCESSES AND CULTURE AT SCALE

Mortgage Connect approached Humareso seeking a transformative solution to completely redesign performance management in their organization. The previous processes relied on a variety of documents and rigid structures of their HRIS PM module, leading to a process employees avoided at all costs.   Using Humareso Perform, Humareso's performance management platform, a pilot was launched within a matter of weeks to try a completely different approach to performance management.

Humareso replaced a haphazard collection of SMART goals with simple Objectives that were assigned by managers to individuals, creating a culture of tighter alignment and consistency. Leaders were also assigned leadership habits, which were clusters of observable behaviors that reflected the cultural values Mortgage Connect aspired to, allowing the organization to set expectations not only around work product but also around how leaders were expected to treat their employees.

THE PROBLEM OF PM AT SCALE

As a well-established leader in the mortgage processing industry, the Talent Management team at Mortgage Connect understands the criticality of driving performance through accountability and transparency. However, previous attempts to redesign performance management at the level of the entire organization had proven to be unsuccessful. As a result, many employees had performed in their roles for extended periods without any type of performance evaluation and data available to the organization for key staffing and management decisions was severely lacking.

To transform their process at scale, they decided to start small with a pilot involving the HR team. This allowed them to design the process and test it under real world conditions before deploying it at scale. This allowed the team at Mortgage Connect to test and adjust many of their assumptions without the noise of the rest of the organization. When it came time to scale the process out, it was well vetted and paired with supporting data and testimonies that helped drive its adoption in the entire company.

OBJECTIVE
Build a process that measures performance in a system that people will actively use for tracking goals, performing check-ins, and streamlining reviews.

CHALLENGES
Complex company with a workforce that changes based on market demands, 1000-2500 employees, variety of needs, perception of PM and HR as the enemy.

SOLUTION
Humareso Perform, a fast, easy-to-use PM platform that increases manager accountability, increases transparency, and reduces administrative tasks.

SOLUTION DESIGN

Mortgage Connect partnered with Humareso to roll out a pilot of Humareso Perform (Humaresos Performance Management toolset) to the HR organization, spanning approximately 50 users. The HR team's goal was to craft and validate a PM process that truly fit their organization's needs without losing sight of their primary goal: Make a process people would use.

With the partnership of their Humareso consultant, Mortgage Connect outlined their goals for the program, including measuring objective work product quality and timeliness measures as well as the leaders' performance to the behaviors tied to their Emotional Intelligence programs. They also wanted a process that would collect longitudinal data to track individual performance and program compliance performance over time. Humareso's consulting team worked closely with Mortgage Connect's Human Resources team to design this process from start to finish, blending a simple objective structure that users could easily understand and utilize along with a competency model of observable behaviors that aligned with their cultural performance goals.

The behaviors were then measured weekly by feedback providers using simple swipe technology. Using this microsampling methodology, Humareso collected hundreds of data points to model into custom dashboards demonstrating impact for Northwestern Mutual's talent management team. Objectives were created by leaders and assigned to their team members, and the process of soliciting updates was automated through Humareso's swipeable card deck as well.   Users were given small rewards for completing these activities, driving an high level of adoption across the board, simplifying compliance.

Humareso's modern software tools allowed the program to easily be scaled out to the organization's user bases and minimized user training and consulting overhead. This allowed Humareso to offer a price point at a per-employee basis that was significantly lower than the classic costs of consultant and competitive software as a service offerings.

IMPLEMENTATION

As previous performance management programs had stagnated, participation and adoption were a concern. Humareso's consulting team worked glove-in-hand with Mortgage Connect to develop a rollout strategy that would ensure high adoption and ongoing participation of both the leaders and individual contributors in the organization.

This strategy included:
- Development of a dedicated microsite for participants to swipe through and familiarize themselves with Humareso. Visits to this training site paced the number of participants in the program signaling interest and engagement with the program.
- Personalized training content to appeal to their participants at Mortgage Connect, such as short videos, live training sessions, and micro-courses.
- Announcement emails and other training materials to help familiarize participants and feedback providers ahead of the launch of the program.

Rollout was time-sensitive, and the program was able to launch to scale a short time after the pilot project began. Humareso's consulting team collaborated seamlessly with the Mortgage Connect team, ensuring the program's immediate success. This hands-on approach facilitated a smooth launch and enthusiastic participation.
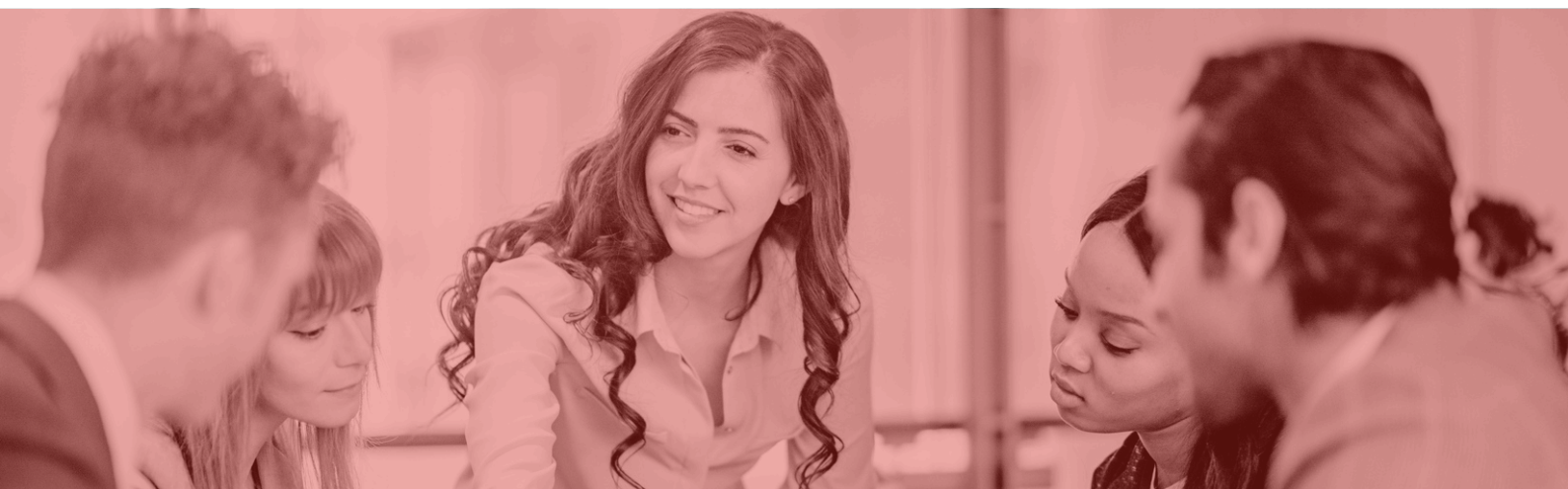
METHODOLOGY

Feedback is the most fundamental and effective way for a person to hone a skill, whether it's what they make or how they make it.

The problem with feedback is that objective feedback is difficult to collect. The two main problems with getting quality feedback are: 1) users who would observe the leader the most frequently don't possess the necessary communication skills to articulate the objective, developmental elements of high quality performance feedback and 2) feedback providers are often unwilling to commit the necessary time and effort to provide high quality feedback.

Humareso's Performance Management platform solves these two problems with exceptional elegance.

Humareso's feedback platform focuses on simple objectives and observed behaviors. The objectives completed and rated over time then funnel into the performance meetings the managers have with their direct reports. The frequency and structure of these meetings might vary for different business units, but by using a consistent structure of the objectives, whether this meeting is occurring casually at a monthly pace or formally as a yearly review, Humareso can easily aggregate and present the data the manager needs to make that conversation successful, and the organization has the critical performance data it needs to analyse and understand what employees are achieving in the work environment.

Humareso provides the right mix of flexibility and consistency that allows Mortgage Connect to simultaneously collect high quality performance data at scale and allow managers a process flexibility that fits their business unit.

Humareso supports these variations and needs for customization, and the organizational psychologists in our organization have the capability of consulting organizations of any size and complexity in selecting or designing a process that fits their organization's needs using Humareso's platform.
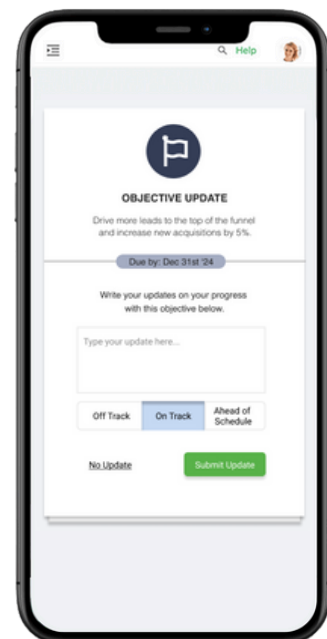
OVERVIEW OF THE MORTAGE CONNECT PERFORMANCE MANAGEMENT EXPERIENCE IN HUMARESO REFLECT

1. New users are created in Humareso through an integration with their HRIS and are invited to complete an onboarding experience that explains the tool and process to them. Managers then assign them objectives so there's clear alignment on what they should be working on.
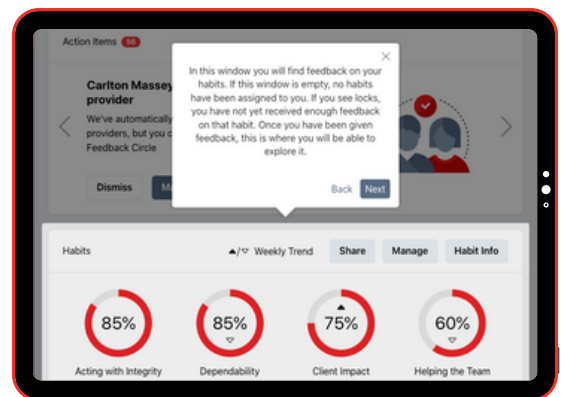

2. Once a week Humareso prompts and collects feedback and updates from the user. Users can provide feedback and updates via any device with an internet browser, including laptops, phones, tablets, and kiosks.
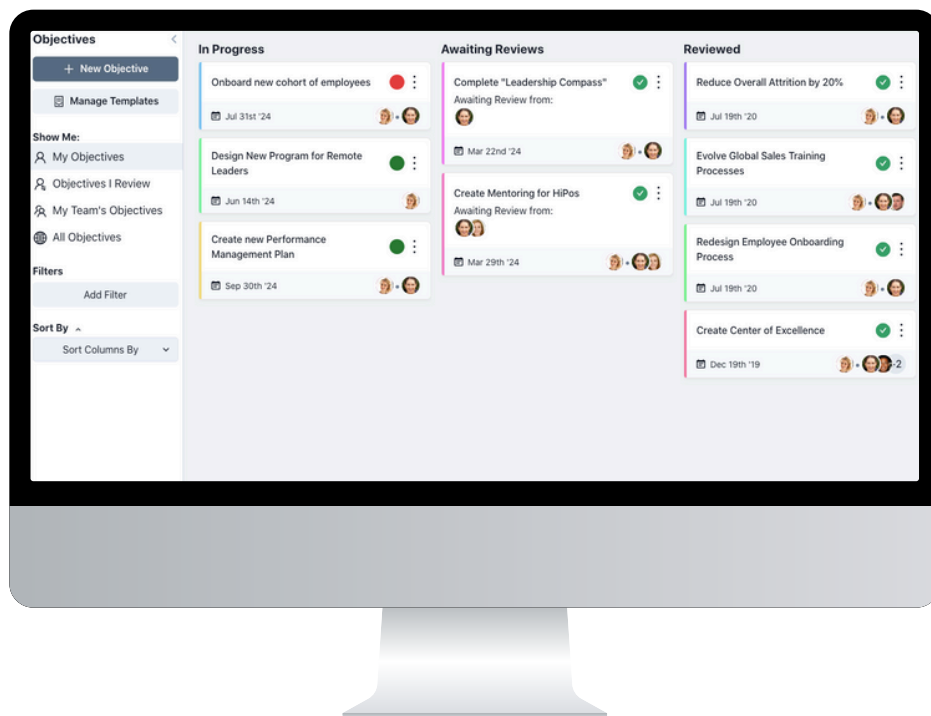
3. Feedback and updates are aggregated and used in a 1:1 process at the cadence the organization desires for their team.

4. Humareso automates the aggregation and flow of the review process. Managers can focus on the conversation, connection, and review of objective data rather than spending time collecting and organizing information themselves.
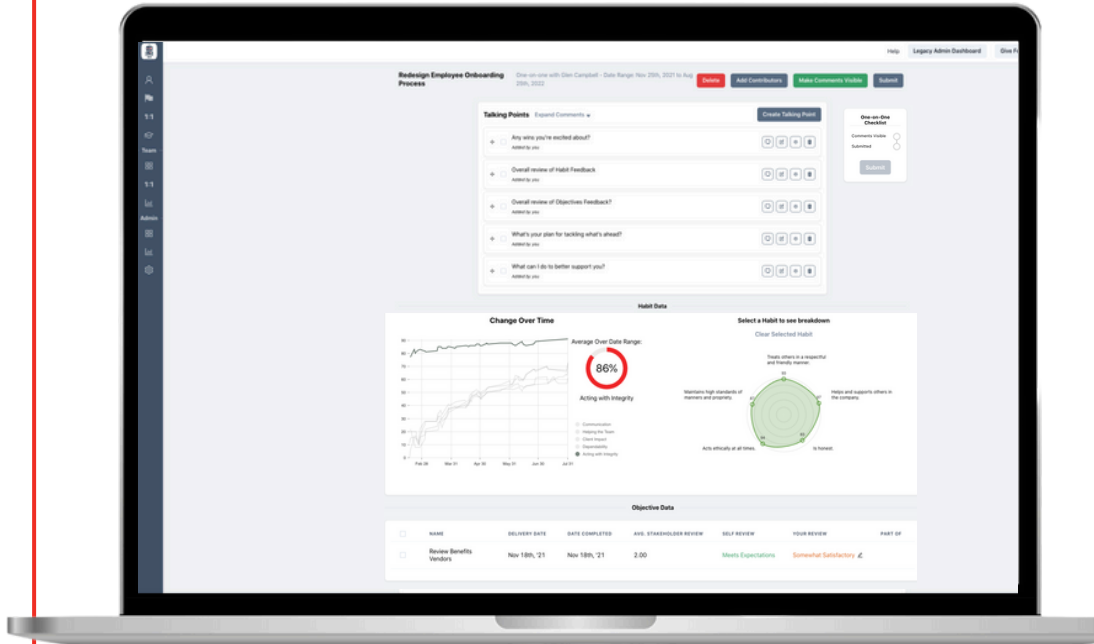
5. Employees develop a rhythm of creating objectives, providing updates and feedback and completing them. They're rewarded with raffle tickets and small prizes within the platform along the way.

6 Managers can use Humareso's manager dashboard tools to track and see the progress of their team over time and get an update on what people are working on any time they need to.

7. Data from the different steps along this process feed a robust set of reporting, dashboarding, and visualization options available to the talent management organization for further analysis and to assist with program accountability and success.

OUTCOMES

The VP of Human Resources was delighted with the outcomes we drove with their revamped performance management process. Mortgage Connect remains a customer of Humareso and is on their third year of using Humareso as their performance management platform.

One senior leader in the organization shared the following feedback in a direct review on G2 about Humareso:

"Once the employees adjusted to the challenging task of being honest and actually self-evaluating, they say they look forward to our monthly check-ins. After the first 6-8 months, we started to hear our staff asking for feedback more in our monthly meetings. Their comfort level with their management and ability to have us focus on them has resulted in increased production and much better teamwork. Trust has been built from top to bottom. As a manager, being able to look back at the monthly 1-1s and previous annual reviews - as we build them - is invaluable."

In conclusion, this case study exemplifies the shared success between Mortgage Connect, showcasing how Humareso emerges as a catalyst for transformative performance management. As Humareso's influence continues to permeate the organization, Mortgage Connect stands poised for a future defined by empowered leaders and sustained high performance.

HR HUMARESO