A little bit about Klue

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We're a Series B company

100 Kluebees | 3 Hubs: Vancouver, Toronto, London + Remote US & CA

TOTAL FUNDING

salesforce ventures TIGERGLOBAL CRAFT RHINO VENTURES OMERS H|W|V|P bdc*

TRUSTED BY SOME OF THE BEST BRANDS

ClickUp salesforce HubSpot Adobe vmware sas

ENTERPRISE GRADE

SOC2 salesforce appexchange

Win-Loss
Product Launch

DoubleCheck
Acquisition

Series B
Raised

Series A
Raised

$80M+
TOTAL FUNDING

| Q3 2020 | Q4 2020 | Q1 2021 | Q2 2021 | Q3 2021 | Q4 2021 | Q1 2022 | Q2 2022 | Q3 2022 | Q4 2022 | Q1 2023 | Q2 2023 | Q3 2023 |

From Organic to
Intentional Performance

THEN		NOW
25 people. One office, real-time feedback	→	Global team, hybrid work, systems needed to be developed
Organic performance conversations	→	Scalable performance framework
Growth = people addition	→	Growth = developing the right people

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We identified that....

- **Rapid growth made performance feel inconsistent across teams and geographies**

- **Managers had different definitions of "great"**

- **Employees were asking for clarity and growth**

Ultimately, we needed shared language for performance

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Our Current Reality

SMALLER TEAMS
Bigger Impact

Lean teams demanding each member contribute significantly to achieve ambitious goals.
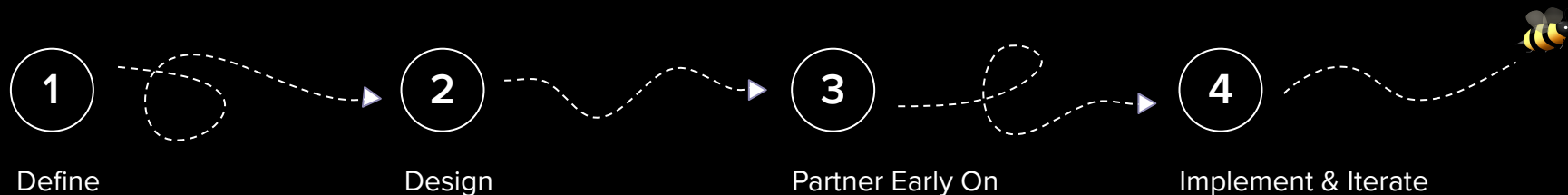
FASTER
Pace of Change

AI who? Changes requiring constant adaptation and quick responses to market shifts.

HIGHER EXPECTATIONS
Less Resources

Expectation to deliver more with optimized resources, emphasizing efficiency and innovation.

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Redesigning Performance at Klue

1 — Define

2 — Design

3 — Partner Early On

4 — Implement & Iterate

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Defining the Foundation

Start with who you are

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Why Work at Klue?

Our employee value proposition (EVP)

- ⊘ **Unlock Your Potential.**

- ⊘ **Push the boundaries of what is possible for you, your peers, and our customers.**

- ⊘ **Take risks.**

- ⊘ **Take action.**

- ⊘ **Innovate.**

- ⊘ **Build a category-leading company.**

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Our Core Values

**Relentless
& Resilient Builder**

**Genuine Self
Without The Ego**

**Elevation
Flywheel**

**Team
Before Self**

**Trustworthy
& Open**

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Design the System

Bringing clarity to performance
What does high performance actually mean? 🤔

Our Core Principles

1

SIMPLE

2

CUSTOMER
FOCUSED

3

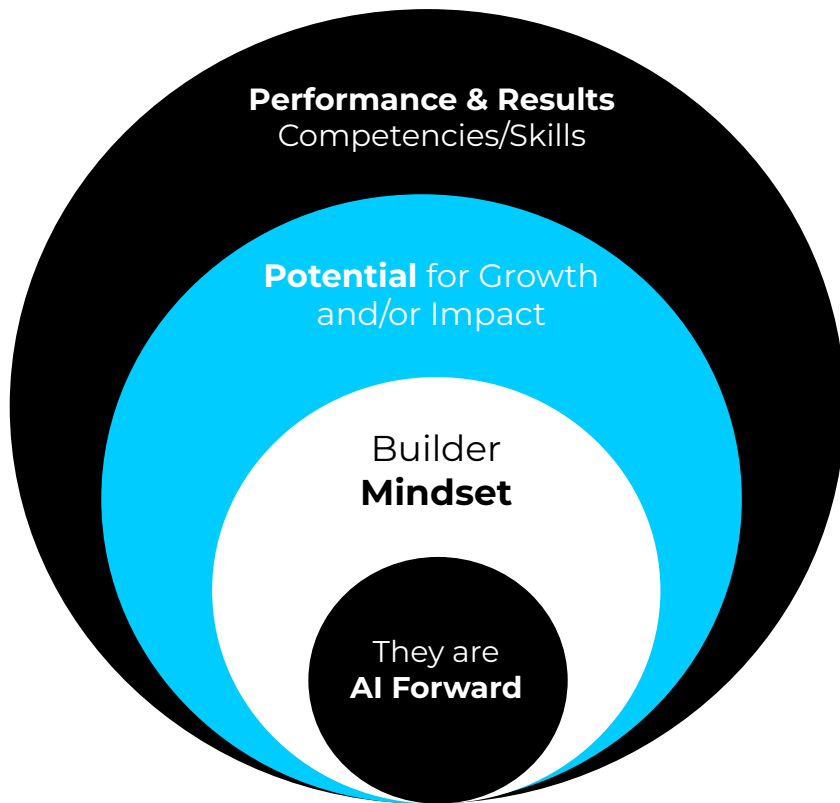BALANCES
BUSINESS &
PEOPLE

4

SCALABLE

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Defining Great Talent *V1*

We are looking at the concept of "high performance" through these three frames.
You will see these themes throughout our Performance Program

Performance & Results
Competencies/Skills

Potential for Growth
and/or Impact

Culture
Contributors

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Revised Great Talent Definition

Now, we look at the concept of "high performance" through these four frames.

Performance & Results
Competencies/Skills

Potential for Growth and/or Impact

Builder
Mindset

They are
AI Forward

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Okay, cool. Now what?

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✨ **Bringing the Definition to Life** ✨

WHAT WE REDESIGNED

- **Talent Reviews & Calibrations**

- **Progress Reviews (aka Performance Reviews)**

- **Quarterly Check-Ins**

- **Performance Ratings**

- **Colour-Coded Feedback**

SEMI-ANNUAL

Talent Reviews + Calibration

IDENTIFY
Great Talent

CALIBRATE
Performance

PROACTIVELY
Grow & Develop

Managers answer 2 questions on:

1 Performance in Role

2 Potential for Growth/Impact

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Measuring
Talent Density

Talent Density
Percentage of **Green Quadrant** in a given team

This is our primary measurement goal

Heck Yes Density
Percentage of **Heck Yes** in a given team

But this gives us a gut check on high-performing teams

Examples of Actions Coming Out of Calibration
WHAT WE SHARED WITH MANAGERS

Identify Up & Comers

Create plans to work towards **promotion**

Assign **stretch projects** to high potential folks

Identify cross-functional movers & shakers

Consistent Assessment

Preliminary progress review ratings gives you a chance to **take a pause**

Make adjustments prior to actual progress review

Ensure **ratings are balanced**. Without being overly critical or overly generous

Proactive Planning

Identify needs for coaching or support

If you as a manager need support on coaching, **People BP is available** for 1:1 calls to help you coach / develop your folks

Make plans with your BPs for any **Up or Out** discussions

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Progress Reviews

Self Review

1. Performance

2. Potential for Growth & Impact

3. Wins & Bright Spots

4. Challenges/Blockers

5. Culture Contribution

6. Manager Feedback (Stop, Start, Continue)

Manager Review

1. Performance

2. Potential for Growth & Impact

3. Wins & Bright Spots

4. Development Area 1

5. Development Area 2

6. Culture Contribution

60 min Joint Convo

In your 1:1

An open & curious dialogue where you share your thoughts, discuss each section, ask clarifying questions etc.

Gain clarity & alignment.

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🤩 What is a Great Progress Review 🤩

✅ **You reflect on your performance**
What results and impact have you delivered

✅ **You "know where you stand" (growth & gaps)**
Clearer expectations through performance rating & colour coded feedback

✅ **You receive actionable feedback to "unlock your potential"**
That's engaging & motivating

✅ **You have an open & honest conversation**
Exchanging feedback that reinforces trust between Kluebee + Manager

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🏁 How to Run Progress Convo 🏁

✅ **You set the tone - care personally, challenge directly.**
Be human. Reinforce trust.

✅ **You're clear & direct - clear is kind, kind is clear.**
Don't sugarcoat. Be honest in your ratings.
Use specific examples to support the rating & colour-coded feedback.

✅ **You provide actionable feedback to "unlock their potential"**
Do they understand what good looks like? How are they going to get there.

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ANNUAL
Progress Reviews

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Performance Rating
Kluebee & Manager

+ Written context and examples

Rating	Descriptor
Goes Above	Performance is very strong (at times exceptional).
Consistent	Delivers consistently against expectations, drives action, and innovation.
Inconsistent	Meets basic expectations with inconsistent results.
Falls Below	Fails to meet expectations or drive action and impact.

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ANNUAL
Progress Reviews

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Development Area
Colour Coded Feedback

🚦

🟩 **Green** what you're doing well.
We want to see more of this!

🟨 **Yellow** low / no risk.
This is a development area. We all want (and will receive) yellow feedback.

🟧 **Orange** need to address.
Yellow feedback given multiple times with no improvement may *become* Orange feedback.

🟥 **Red** critical issue.
Need to prioritize addressing this.

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What happens after Progress Reviews?
"ALWAYS ON" PERFORMANCE

Turn 1:1s into follow-through

Circle back on performance conversations.

Ask "what's still unclear?"

Clarify expectations & build shared action plans.

Track progress regularly. How might you adjust your 1:1 structure?

"Always on" performance

Normalize feedback & performance conversations year-round. Provide feedback models.

Keep your **talent map lens on** - even between cycles. Incorporate in leadership meetings.

Partner early to stay ahead

BPs are a sounding board in thinking, co-build development plans or prep for tough convos.

Mgrs share progress on underperformers in BP meetings (red/orange).

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QUARTERLY
Check Ins

➡️ Low lift

➡️ Optional

➡️ Replace a 1:1 | 30-45 min meeting.

🔍

Looking Back on the Last Quarter

🤩

Celebrating Wins and Bright Spots

🎯

Performance in Role

🤖

AI Experimentation

🤝

Exchange Feedback

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TL;DR

Talent Reviews & Calibrations	Brought consistency and visibility to how we assess and develop our people.
Performance Review Questions	Built directly around our four pillars. Aligning what we measure with what we value.
Quarterly Check-Ins	Created space for ongoing growth and feedback, not just once-a-year conversations.
Performance Ratings	Simple, 4-point scale that drives clarity, fairness, and real dialogue.
Colour-Coded Feedback	Visual, transparent, and actionable. Employees instantly know where they stand and how to grow.

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Partner Early On

Build it with the business, not for the business

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Implement & Iterate

Get it out the door. What is your minimum viable product (MVP)?

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It doesn't need to be perfect.

Progress over perfection.

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What We Learned Along the Way

- **This might look like a linear process,** but it wasn't.
  It felt messy and at times, we questioned if it would even work.

- **Find your champions. Bring people along early.**
  We met with managers first & select employees for reactions and inputs.

- **Be open to feedback.**
  Be curious, open and listen to feedback. Then make adjustments.

- **Expect questions.**
  And lots of them. That's a good sign of engagement.

- **Be proactive in comms.**
  Build FAQ docs, videos, and resources to support rollout.

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Was this approach successful?

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Positive Signals 👍

✅ **We got to the point faster**
We surfaced insights & created consistency. Managers knew what to look for (and who needed support)

✅ **Clarity, transparency, & actionable feedback**
No sugarcoating. Honesty in ratings. Used specific examples to support.

✅ **Everyone leaned in**
Majority done within the time frame! We saw fewer last-minute scrambles.

✅ **It just *felt* better**
More human. Feedback like "it was intuitive," "colour-coding made it more clear" and "we left the convo feeling more aligned"

Many managers walked away with a clearer sense of where their team stands

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⭐ **100% participation rate in the Talent Review**
With the exception of our CEO, but he is committed to doing this!

⭐ **4 promotions out of the last Talent Review**

⭐ **30% performance-based exits (vs. 14% prior)**

⭐ **98% participation rate in the Performance Review**

aaaannnd we still have areas of improvement
Engagement survey results reflected employees still want more transparent conversations about career growth and expectations.

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What to **Improve** 💪

💡 **Timing.** Giving our teams more of a heads up. It felt rushed.

💡 **More guidance & support.** For managers & employees.

💡 **Further embed.** e.g. Adding colour coded feedback in 1:1s

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💥Clarity drives performance💥

THIS IS A MOMENT OF GROWTH FOR YOU

#SCHITTSCREEK

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Your Turn:
Where's Your Opportunity?

How clear is your definition of 'great'?

Do employees know where they stand?

How do you measure culture?

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Need help getting started?

YOUR OWN CHECKLIST

Define

Get clear on who you are and what great looks like.

✔️Clarify your Employee Value Proposition. What kind of people thrive (and don't).

✔️Revisit your company values. Do they reflect behaviors you actually reward.

✔️Align leadership on what "great talent" means, before you measure it.

Design

Consider your core principles/guidelines. What's important to your org?

✔️ Keep it simple. Use clear, memorable language

✔️Customer focused. It needs to actually solve problem or provide value. Not just an hr check box

✔️ Balance what's right for people and for the business.

✔️Test for scalability

Partner Early On

Build it with the business, not for it.

✔️Involve leaders or employees early. Co-create definitions and test language.

✔️Communicate the "why" behind every change. Make leaders owners, not passengers.

✔️Work with leaders on how to embed in business cycles.

Implement & Iterate

Launch it, learn fast, and keep evolving.

✔️Get it out the door. What is your minimum viable product.

✔️Gather feedback and measure impact. Iterate every cycle.

✔️Evolve with business needs.

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LET'S KEEP THE CONVERSATION GOING

Connect with me today

or

Find me on LinkedIn

Simran Bahia | Senior People Business Partner | Klue

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