

PacificSource Health Plans Overhauls Employee Appraisals & Eliminates Paper Nightmare

Using a paper-based appraisal system, PacificSource Health Plans had poorly defined performance objectives, inconsistent ratings, and zero useful data to use for employee performance monitoring or improvement. In an effort to make employee appraisals useful and meaningful, PacificSource Health Plans set out to overhaul their employee performance management processes:

Using emPerform, PacificSource has been able to:

- Create meaningful reviews by tailoring goals and ratings to individual roles
- Save time and effort by eliminating manual, paper appraisals
- Produce meaningful performance data that references year-round observations.
- Monitor the real-time status of appraisals and performance

“We had a **paperwork nightmare** that didn't provide much in the way of useful data or performance improvement and tracking.”

*Paul Wynkoop - VP of Administration
PacificSource Health Plans*

The Company

For over 79 years, PacificSource Health Plans has been delivering healthcare solutions to businesses and individuals throughout the Northwest. PacificSource is an independent, not-for-profit community health plan that values partnership, service excellence, community, and personal relationships. Based in Eugene, Oregon, the PacificSource family of companies serves more than 280,000 individuals and 6,600 employer clients throughout the Northwest and employs more than 650 healthcare professionals.

Software Requirements

PacificSource Health Plans was in search of an employee performance management Solution that would meet very specific requirements.

The new software had to:

Meet the Needs of I.T.: PacificSource knew that in order for a software system to pass the test, it had to meet their technical requirements:

- The new system had to have an **open architecture** that would allow them to import their own data, content, and libraries
- Any software chosen would have to be based on IE and **Microsoft® Technology**
- Their appraisal technology had to be flexible enough to guarantee flawless **integration with Learning Management System (LMS)** down the road
- PacificSource needed to find a vendor that offered **on-premise deployment**

Deliver Appraisal Form Flexibility: PacificSource's talent base is comprised of roles with very broad and specific skill sets. They needed an appraisal system that would grant them the freedom to create as many different forms, goal categories, and ratings as needed to properly evaluate each employee.

Contain a Wide-Array of Tools: PacificSource had mapped out a new talent management program that would require more than just an HRIS or generic appraisal software platform. They needed an integrated solution that would deliver on all of the functionality needed to execute a complete employee performance management strategy; including goal and competency management, development planning, status tracking, and reporting.

Offer Low Cost of Ownership: Like many organizations in the Healthcare industry, PacificSource needed to obtain a solution that would meet their requirements while also offering a relatively low cost of ownership. The solution chosen would have to have great value and no surprises or add-on costs.

The Selection Process

PacificSource Health Plans first began their search by looking at various HR systems. They quickly found that no HRIS was going to meet all of their needs and so they began to seek out individual, stand alone performance management solutions. PacificSource came across emPerform through an email ad and were excited to see it was a Microsoft partner and thus would be good for their I.T. department's needs. "From there, the selection process was simple. emPerform offered us all of the functionality in one system for the best price we could find and met all of our technical and process needs. We had a pretty extensive checklist of requirements and emPerform scored across the board for all of them."

The Results

PacificSource has noticed severable measurable benefits of using emPerform:

"The emPerform implementation staff was EXCELLENT. We could not have asked for better people to work with us. It went extremely well and the work done up-front has made the system run smoothly since."

Quick Implementation: PacificSource was able to implement emPerform very quickly. The emPerform implementation team worked with them to analyze their requirements and create a custom training & implementation plan that would meet their goals.

Increased Understanding of Performance: Using emPerform reporting, PacificSource has a better understanding of where managers and employees are in the process and what the status of performance is year-round.

Better Talent Records: Not only has emPerform given PacificSource a central repository to store past and present reviews and data, it has given employees and managers a platform for sharing and archiving year-round notes and accomplishments. This archive of data has created more accurate reviews. Before, managers used to try to remember performance milestones and accomplishments resulting in a high degree of bias and human error and ultimately inaccurate appraisals. emPerform now offers a year-round archive of performance metrics to use for better appraisals and decision making and historical data that can be used for trend analysis.

Relevant Employee Appraisals: emPerform has allowed PacificSource to use their own competencies and ratings and apply them to select roles or individuals, resulting in highly-tailored appraisals for the company and much more relevant performance data.

Consistency in Addressing Performance: During the first review period using emPerform, PacificSource Management commented that by having a common language and clear performance expectations, emPerform was helping them to address performance & behavioral issues much more efficiently than before.

Going Forward

PacificSource plans to integrate emPerform with their new LMS system in the coming year. PacificSource has chosen Strategia™ (a Peoplefluent company) as their learning management system and will be able to tie emPerform competency and performance gaps directly to Strategia's development activities, creating a seamless way to automate and simplify employee performance and learning & development initiatives.



"emPerform has allowed us to make reviews relevant! It's intuitive and easy to design and set up."

*Paul Wynkoop, VP of Administration
PacificSource Health Plans*

About emPerform

emPerform is an all-inclusive Performance and Talent Management solution that enables businesses to **align, develop, reward, and retain talent**. This all-in-one suite includes robust functionality to simplify and automate core talent management processes, including: performance appraisals, compensation management, 360 degree multi-rater feedback, succession planning and one of the most powerful and flexible reporting and analytics tools available. For more information, visit www.employee-performance.com

Get started today!

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