UK performance management software scorecard

People Performance Playbook · Vendor-neutral · 10 November 2026 · Use the same criteria and questions for every vendor. Score what you saw working on your own data, not what you were told: **0** = not shown, **1** = partly or with workarounds, **2** = shown working. Add a weight (1–3) for how much each criterion matters to you, then multiply.

1. Score each tool (write the tool names in the header)

Criterion	What good looks like	How to test it	Weight	Tool A	Tool B	Tool C
Process fit	Runs your forms, grades and cycle without heavy workarounds	Configure one of your real review forms and rating scales				
Goals	Company, team and individual goals with owners and progress, linked to the review	Set up one team's goals; check they appear in its reviews				
Reviews	Self, peer, manager and upward input; same questions for every manager	Run one review end to end for a test employee				
Calibration	Shows ratings by manager, flags outliers, records changes with a reason and sign-off	Calibrate a sample team; check original and final grades are both kept				
Evidence	Each rating backed by goals, examples or feedback; a written record the employee can see	Open a test employee's record and see what they would see				
Integrations	Documented integrations with your HRIS, identity provider and the tools goals live in; clear route to payroll	Check the vendor's public docs for your exact systems and which fields sync				
Security	Role and regional permissions, SSO and provisioning, retention settings, clear data-location answers	Send section 2 questions to the vendor and your IT lead				
Pricing transparency	Written quote for your headcount, with minimums, add-ons and implementation fees stated	Compare total first-year and renewal cost, not list price				
Weighted total (sum of weight × score)						

2. UK and Ireland checks (tick when answered in writing)

	Question	Tool A	Tool B	Tool C
☐	**Acas-consistent process:** cycles at your chosen frequency (Acas: regular reviews, “a good idea to do them at least once a year”); a written record of what was discussed, shared with the employee; check-ins and feedback between reviews			
☐	**Access controls:** who sees ratings, grade history and feedback; HR access limited by country or entity; payroll vs performance data separated			
☐	**Data protection (UK GDPR / EU GDPR):** retention periods you can set; subject access export for one employee; AI features limited to what the user can already see			
☐	**Sign-in:** SSO for your identity provider; SCIM provisioning if you need it			
☐	**HRIS and payroll:** which system is the source of truth; fields that sync and in which direction; leavers; route to payroll			
☐	**Data location:** where data is stored and processed; where backups are held; sub-processors and their countries; transfer mechanism outside the UK/EEA; certifications or audit reports and renewal dates			

3. Two-job-family pilot (top two tools, one short cycle)

1. Pick two job families that work differently. Write their scorecards and rating scale before any vendor meeting.
2. Put the same people through both tools: goals, self and manager reviews, one calibration session.
3. Score straight after with section 1. Ask managers and employees how long it took and whether the record was clear.
4. Agree with each vendor up front how a pilot works, what it costs and what happens to pilot data afterwards.

Pilot notes	Tool A	Tool B
Job families used		
Configuration effort		
Manager time per review / feedback from managers		
How calibration went		
Written quote (first year and renewal, incl. minimums, add-ons, fees)		

Sources: Acas, Performance management: reviews and appraisals (last updated 23 June 2026, checked 10 November 2026), https://www.acas.org.uk/performance-management · Acas advice covers England, Scotland and Wales: https://www.acas.org.uk/advice · Not legal advice. Full guide: https://peopleperformanceplaybook.com/performance-management-software-buyers-guide/ · Named comparisons: /lattice-vs-culture-amp-vs-15five/ and /performance-management-software-alternatives/ · Disclosure: the author, Ash Taherian (Product Sales Executive, Revolut People), works for a vendor in this category. Book a 15-minute review: https://peopleperformanceplaybook.com/call/