



ENTERPRISE — **BUYER'S GUIDE**

TO SELECT THE RIGHT PERFORMANCE MANAGEMENT SOFTWARE

betterworks
Make Work Better.

TABLE OF CONTENTS

Introduction	3
Who this guide is for	4
What we'll cover	6
Comparing 5 performance management vendor types	8
<i>Continuous performance management platforms</i>	8
<i>HRIS/ERP performance modules</i>	10
<i>Traditional review-focused platforms</i>	12
<i>Engagement platforms with performance add-ons</i>	13
<i>Low-code and custom builds</i>	14
3 step evaluation process	16
<i>Step 1: Define your non-negotiables</i>	16
<i>Step 2: Compare vendors consistently</i>	17
<i>Step 3: Shortlist 2–3 finalists for deeper evaluation</i>	19
Enterprise performance management scorecard	20
<i>How to use this scorecard</i>	21
Making the right decision	22

INTRODUCTION

Performance management shapes how your managers lead, how well your teams align, and whether your business strategy translates into daily work.

Get it right, and goals adjust as priorities shift.

Managers give feedback when it matters, not months later. Employees see how their work connects to what the company is building. Engagement drives productivity. Employee performance and development align with business strategy, from what works in production. This guide gives you a practical way to choose confidently.

Get it wrong, and annual reviews become surprises.

Managers across hundreds of teams spend countless hours on appraisals but don't feel like they have time to coach in the moment. Goals set in January gather dust across divisions by March.



And at the enterprise level, you're navigating this across multiple regions, complex organizational structures, and a broad, distributed manager ecosystem with inconsistent coaching maturity. The stakes are higher, and the margin for error is smaller.

The market offers hundreds of options, including basic review management tools, continuous performance enablement platforms, HRIS performance modules, and more.

To choose well, you need a way to separate what looks good in a demo from what works in production. This guide gives you a practical way to choose confidently.

WHO THIS GUIDE IS FOR

This guide is designed for **enterprise leaders** purchasing performance management software for organizations with

5,000+

employees.

In enterprises of this scale, purchasing decisions are rarely owned by a single role. They span multiple stakeholder groups, each with distinct priorities, risks, and success metrics.

CHROs and VPs of People

CHROs and VPs of People who see the disconnect between business performance and people performance. Your goals are misaligned, feedback is inconsistent, and outcomes aren't measurable. You need a system that turns sporadic reviews into continuous enablement — one that aligns talent strategy with business goals across global teams without adding friction.

HR Operations and People Systems leads

HR Operations and People Systems leads who spend too much time chasing forms and fixing broken workflows. Managers find the current tool clunky, so they build shadow systems. You need a partner who integrates cleanly, automates workflows, and keeps processes stable while supporting managers across regions and business units.

HRIT and IT leaders

HRIT and IT leaders who must ensure new tools clear security reviews, integrate without creating maintenance burden, and scale reliably. You need confidence in SSO, data governance, vendor risk assessment, and performance under load — especially when supporting phased rollouts across regions.

People Managers and Team leaders

People Managers and Team leaders who are tired of performance management that feels like performance theater. Annual reviews arrive too late to help. You want simple workflows that help you coach in the moment and proactively manage team performance.

Executive Sponsors

Executive Sponsors who secure funding and build coalitions across departments. You care about measurable impact: improved retention, higher goal completion, and ROI that justifies the investment.



WHAT WE'LL COVER

You'll learn how to evaluate vendors based on what predicts success at enterprise scale: manager adoption that changes coaching behavior, flexible goal-setting that keeps pace with strategy, trustworthy data that informs decisions, and support for complex organizational structures.

Compare common vendor models

See how continuous performance enablement platforms, HRIS modules, traditional review tools, hybrid employee engagement platforms, and custom builds differ, and which operating models they support best at scale.

Evaluate vendors using a 3-step process

Move beyond feature checklists to assess manager adoption, configurability, data credibility, integration depth, and change support.

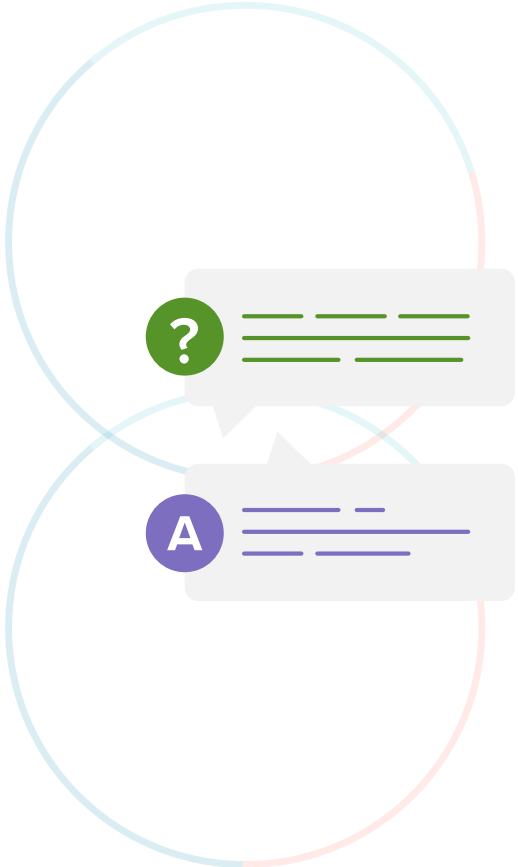


Ask better questions during demos and reference checks

Use targeted prompts to uncover how vendors handle enterprise complexity, phased rollouts, and real-world manager behavior.

Verify before you scale

Choose the right deployment approach — focused, phased, or proof-of-concept — and validate whether a vendor's workflows match how your organization actually runs.



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COMPARING 5 PERFORMANCE MANAGEMENT VENDOR TYPES



Different performance management vendors optimize for different outcomes: enablement vs. standardization, flexibility vs. governance, speed vs. suite control. This section breaks down the major categories so you can quickly identify which ones likely match your operating model best.

CONTINUOUS PERFORMANCE MANAGEMENT PLATFORMS

Examples: Betterworks, Lattice

Best for: Mid-to-large enterprises replacing annual reviews with continuous performance across teams. Organizations where manager adoption and workflow flexibility matter more than single-vendor IT control.

Core capabilities to look for:

- » **Flow-of-work integrations:** Performance actions happen inside Slack, Teams, Outlook, and Gmail instead of a separate system
- » **Flexible goal frameworks:** Supports OKRs, KPIs, and project milestones in the same platform, configurable by department
- » **Real-time analytics:** Dashboards surface goal progress, feedback frequency, and engagement signals early enough to intervene
- » **AI-guided coaching support:** Nudges prompt check-ins when goals drift, bias alerts flag problematic language, and summaries reduce manager effort
- » **Configurable templates:** Different review cycles, questions, and workflows by division or region

How they work: A product manager's OKR drifts 15% behind target. A nudge appears in Teams: "Check in with Sarah about Q2 launch timeline."

The manager clicks, sees recent goal updates and last month's feedback in context, and schedules a 15-minute conversation.



The check-in happens in the flow of work, not after logging into a separate system.

Sarah adjusts the key result based on shifting priorities, and the change cascades to aligned goals automatically.

AI doesn't replace managerial judgment. It removes friction so managers can actually use it when timing matters.

WHAT TO EVALUATE DURING DEMOS

How does it prompt behavior change?

- » **Ask:** Show us what happens when a goal drifts. Does the system nudge action, or wait for the manager to remember? How does it guide new managers?

How do managers give feedback in Slack or Teams?

- » **Ask:** Ask the vendor to show you the exact workflow. Is it a native experience (feedback form opens in Slack), or does it redirect to a browser? How long does it take to complete the process?

Can you run OKRs in product and KPIs in sales — in the same platform?

- » **Ask:** Show us how product sets quarterly OKRs while sales tracks monthly KPIs. Can we configure different goal types by department without creating separate systems? At 5,000+ employees, how do you maintain consistency while supporting local flexibility?

Does calibration detect bias in rating distributions?

- » **Ask:** If women in engineering receive lower ratings than men for the same competencies, does the system flag it? Can we configure custom calibration grids (9-box, impact vs. risk) by division?

What does a 12–14 week Phase 1 rollout actually include?

- » **Ask:** What milestones happen in weeks 1–4, 5–8, and 9–14? Who leads change management — your team, our team, or shared? What does ongoing support look like post-launch? At 2,500+ employees, can the vendor support phased rollouts across time zones? Do they have enterprise customer references?



Trade-offs:

- » **Requires HRIS integration:** Must sync org structure, reporting lines, and employee data from your system of record
- » **Benefits from change readiness:** Unlocking the full ROI of the software requires operationalizing the continuous performance model, which can take time.
- » **Vendor maturity varies:** Mid-market tools work well under 2,500 employees. At enterprise scale (5,000+ employees, multi-geo, complex permissions), evaluate whether the vendor can handle your level of configurability and phased rollout complexity

Enterprise fit: Strong for organizations prioritizing manager adoption, continuous coaching, and flexible workflows. Requires commitment to change management and willingness to integrate with existing HRIS.

HRIS/ERP PERFORMANCE MODULES

Examples: SAP SuccessFactors, Workday Performance, Oracle HCM

Best for: Large enterprises (10,000+ employees) wanting single-vendor control and deep finance integration. Organizations where IT simplicity outweighs workflow flexibility.

Core capabilities to look for:

- » **Native data syncv:** Performance data lives in the same system as payroll, org structure, and compensation
- » **Security model alignment:** Permissions, SSO, and compliance already configured
- » **Suite consolidation:** One vendor relationship for IT to manage

WHAT TO EVALUATE DURING DEMOS

Can it support continuous feedback, or just annual cycles?

- » Most HRIS modules were built for compliance-driven annual reviews.
- » **Ask:** Can managers give feedback in Slack or Teams, or must they log into the HRIS? Can employees request feedback outside of scheduled review windows?

Can goals adjust mid-quarter as strategy shifts?

- » HRIS platforms often lock goals to review periods.
- » **Ask:** If our Q2 priorities change in May, can teams edit OKRs without breaking cascades? How long does it take to make those changes? At scale, can different divisions run different goal frameworks simultaneously?

Is calibration flexible or rigid?

- » Many HRIS modules assume one calibration model for the entire company.
- » **Ask:** Can we configure different grids (performance vs. potential, impact vs. risk) by division? Does the system detect bias in rating distributions across regions or departments?

How quickly does the vendor innovate?

- » HRIS vendors release updates annually or quarterly, not monthly.
- » **Ask:** When was your last major feature release? How do you prioritize customer feedback?

What does a 12–14 week Phase 1 rollout actually include?

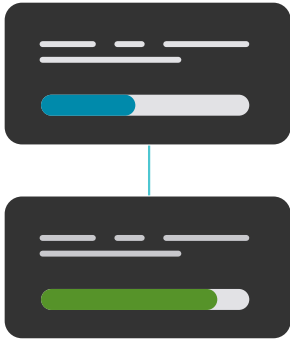
- » **Ask:** What milestones happen in weeks 1–4, 5–8, and 9–14? Who leads change management — your team, our team, or shared? What does ongoing support look like post-launch? At 2,500+ employees, can the vendor support phased rollouts across time zones? Do they have enterprise customer references?

Trade-offs:

- » **Extended deployment timelines:** Implementations are usually scoped as multi-month projects, with performance implemented alongside other HR or ERP components.
- » **Steep learning curve:** Complex interfaces and workflows emphasize governance and standardization, which can slow down adoption.
- » **Rigid workflows:** At scale, difficult to support different review cycles by division or region

Enterprise fit: Strong for organizations prioritizing single-vendor IT strategy and deep finance integration. Weak for organizations prioritizing manager enablement, continuous feedback, and workflow flexibility across diverse business units.





TRADITIONAL REVIEW-FOCUSED PLATFORMS

Examples: PerformYard, Trakstar, ClearCompany

Best for: Teams ready to move off of spreadsheets that need customizable review cycles.. Organizations running structured annual or quarterly reviews.

Core capabilities to look for:

- » **Review-centric workflows:** Structured annual or quarterly reviews with customizable templates
- » **360-degree feedback:** Peer and upward feedback collection
- » **Goal tracking:** Basic alignment and progress tracking, limited real-time updates

WHAT TO EVALUATE DURING DEMOS

Does it support continuous feedback, or just scheduled reviews?

- » **Ask:** Can managers give feedback outside of formal review windows? How does spontaneous recognition work?

Can managers access it in Slack or Teams, or only via desktop login?

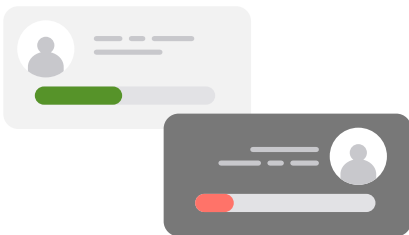
- » **Ask:** Show us how a manager completes a check-in. How many clicks? Where does it happen?

How flexible is goal-setting when priorities shift mid-quarter?

- » **Ask:** If a team's goals change in March, how quickly can we adjust without breaking the review cycle?

Does it integrate with your HRIS, or require manual data entry?

- » **Ask:** How do you sync org structure and reporting lines? What happens when someone changes managers?



Trade-offs:

- » **Limited continuous feedback:** Best for formal review cadences, not real-time enablement
- » **Desktop-centric experience:** Often lacks flow-of-work integrations
- » **Enterprise gaps:** Multi-language support, complex permissions, and global configurability often require workarounds



Enterprise fit: Works for organizations under 2,500 employees or divisions running simple annual cycles. Struggles with global complexity and continuous coaching at scale.

ENGAGEMENT PLATFORMS WITH PERFORMANCE ADD-ONS

Examples: Culture Amp, Glint, Qualtrics

Best for: Organizations prioritizing culture and sentiment data. Teams needing real-time engagement insights alongside basic performance tracking.

Core capabilities to look for:

- » **Pulse surveys and culture measurement:** Continuous engagement tracking
- » **Basic goal-tracking features:** Often bolt-on, not core product
- » **Review templates:** Simple performance assessments

WHAT TO EVALUATE DURING DEMOS

How deep is the performance functionality?

- » **Ask:** Can this replace our current performance system, or does it supplement it? What's missing?

Does it support calibration, compensation linkage, or talent analytics?

- » **Ask:** Can we run talent reviews and succession planning in this platform? How does it connect performance to pay decisions?

How flexible is goal-setting when priorities shift mid-quarter?

- » **Ask:** If a team's goals change in March, how quickly can we adjust without breaking the review cycle?

Does it integrate with your HRIS, or require manual data entry?

- » **Ask:** How do you sync org structure and reporting lines? What happens when someone changes managers?

Trade-offs:

- » **Shallow performance depth:** Limited calibration, no compensation linkage, basic talent analytics
- » **Survey fatigue risk:** Frequent pulses can overwhelm employees
- » **Requires separate platform:** Most enterprises still need a dedicated performance system

Enterprise fit: Works as a companion to performance platforms, not a replacement. Strong for engagement measurement, weak for manager enablement and talent decisions.

LOW-CODE AND CUSTOM BUILDS

Examples: Internal IT-built systems, low-code platforms customized for performance

Best for: Organizations with workflows so unique that off-the-shelf tools can't support them. Teams with dedicated engineering resources for ongoing maintenance.

Core capabilities to look for:

- » **Maximum control:** Tailor every workflow, field, and permission to your exact needs
- » **Unique integrations:** Connect to proprietary systems or internal tools
- » **Full data ownership:** Performance data never leaves your infrastructure

WHAT TO EVALUATE DURING DEMOS

Who owns ongoing maintenance and feature development?

- » Custom systems require dedicated engineering resources.
- » **Ask:** Do we have a team to maintain this long-term? What happens when the original builders leave?

Can it scale to 2,500+ employees without performance degradation?

- » **Ask:** Have we load-tested this at scale? What happens when 200 managers try to calibrate simultaneously across global time zones?

What's the true cost of ownership over three years?

- » **Ask:** How much time will our team spend building new features, fixing bugs, and updating integrations? What's the opportunity cost of this work?

How will you drive manager adoption without a vendor's change management support?

- » **Ask:** Who trains managers? Who builds guides, nudges, and coaching workflows? Who responds when adoption stalls?

Trade-offs:

- » **High administrative burden:** Ongoing ownership increases time, energy, and cost
- » **Technical debt accumulates:** Quick wins create brittle systems that break under scale
- » **Low adoption risk:** Without a vendor's UX and enablement expertise, managers often revert to spreadsheets

Enterprise fit: Rarely sustainable at scale. Works for organizations with mature engineering teams, clear long-term ownership, and workflows so unique that no vendor can support them. Most enterprises underestimate the total cost of ownership.



3 STEP EVALUATION PROCESS

Selecting a performance management partner is a multi-stage decision that unfolds over time. The steps below guide that evaluation, helping you move from initial clarity to a confident decision based on fit, not guesswork.



STEP 1: DEFINE YOUR NON-NEGOTIABLES

Start by clarifying what success looks like before you review vendors.

Which criteria are must-haves versus nice-to-haves? For most enterprise teams, non-negotiables include manager adoption, data credibility, configurability, and integration depth.

Write them down. Agree on them with your stakeholders — CHRO, HR Ops lead, executive sponsors, a sample of people managers, and at least a few end-users. These standards become your filter for every partner.

QUESTIONS TO ASK INTERNALLY:

1. Do we need multi-language support for global teams?
2. Are we running different review cycles by division (quarterly OKRs in product, annual reviews in operations)?
3. How mature are our managers at continuous coaching? Will the platform need to guide them, or can we assume they'll adopt it naturally?
4. What integrations are non-negotiable (HRIS sync, Slack, Teams, API access)?
5. What's our timeline? Can we commit 12–14 weeks for Phase 1 — the typical enterprise rollout timeline — or do we need faster deployment?



This clarity helps you determine which vendor approach — HRIS module, enablement platform, or custom build — fits your operating model.

Red flag: Scheduling demos before you have internal consensus on priorities.



STEP 2: COMPARE VENDORS CONSISTENTLY

Once you've defined your non-negotiables and identified the vendor approach that fits, create a broad set of viable options and use the evaluation scorecard (see below) to compare them on the same criteria.

Score vendors on what predicts adoption, not just what features exist. If managers won't use it daily, the rest doesn't matter. These should be short meetings where you're evaluating broad fit — not diving into technical details yet.

What to score during initial demos:

- » **Manager adoption:** How deeply do they train managers to coach, not just navigate? What's their typical adoption rate at 90 days post-launch? Does the system change behavior or just digitize forms?
- » **Enterprise configurability:** Can we run different templates, cycles, and goal frameworks by division? Does it support multi-language and role-based permissions for complex org structures?
- » **Analytics & visibility:** Do dashboards surface real-time insights, or just completion metrics? Can we drill down by team and see early warning signals?
- » **Integration & technical fit:** Does performance happen in Slack and Teams, or do managers log into a separate system? How clean is the HRIS sync?
- » **Vendor support & scalability:** Who leads change management? What does a typical 12–14 week Phase 1 rollout include? Can the platform handle 5,000+ employees without breaking?

QUESTIONS FOR VENDORS DURING INITIAL DEMOS:

- 1.** Walk us through how you onboard managers. What training do you provide on coaching, not just navigation?
- 2.** Show us how a manager gives feedback in Slack or Teams. Is it a native action or a redirect?
- 3.** Can we configure different review templates and goal frameworks by department without creating separate systems?
- 4.** How do you ensure performance data is fair and unbiased? Does calibration detect rating patterns that suggest bias?
- 5.** What does ongoing support look like after launch? Who's our primary contact during peak review cycles?

Have multiple stakeholders score independently, then compare results. Patterns emerge quickly and help narrow the field.

Red flag: Allowing enthusiasm over a single demo to override the rubric.





STEP 3: SHORTLIST 2–3 FINALISTS FOR DEEPER EVALUATION

A tight shortlist forces focus. Instead of running broad RFPs with 10 vendors, select 2–3 that score highest on your priorities.

This allows for meaningful in-depth discovery calls, hands-on product walkthroughs, and early visibility into working style. You'll learn whether their change-management playbook matches your culture and whether their customer success team actually shows up.

QUESTIONS FOR REFERENCE CALLS:

1. How long until managers adopted the system? What percentage were actively using it at 90 days?
2. How responsive is support during peak review cycles? Did they scale their team to match your needs?
3. How many employees were you managing when you implemented? Did the vendor scale support as you grew?
4. If you could redo the implementation, what would you change?
5. Would you choose this vendor again?

Red flag: A “shortlist” so long that you can’t evaluate any partner deeply.



ENTERPRISE PERFORMANCE MANAGEMENT SCORECARD

Score each vendor 1–5 (1 = poor fit, 5 = excellent). Adjust weights to match your priorities.

Dimension (Weight)	What to Evaluate	Excellent (5–4)	Poor (2–1)	Red Flags
Manager Adoption & Behavior Change (25%)	Do managers use it daily? Does it change coaching habits?	Managers check in 2x/month; feedback flows continuously; coaching becomes routine	Rolled out without training; managers revert to spreadsheets; shadow systems persist	Few managers log in after launch; tool feels like compliance theater
Enterprise Configurability (20%)	Can you support multiple workflows, languages, and org structures?	Separate templates by division; multi-language support; role-based permissions; flexible goal frameworks	One-size templates; manual workarounds for global teams; rigid permissions	Vendor claims “fully configurable” but requires professional services for every change
Analytics & Visibility (20%)	Can leaders see what’s happening in real time and drill down by team?	Real-time dashboards; drill-down to individual level; goal progress tracking; early warning signals	Delayed reporting; completion metrics only; no team-level visibility	Must request custom reports from IT; data refreshes weekly or monthly
Integration & Technical Fit (20%)	Does it sync with your HRIS, support SSO, and work in daily tools?	HRIS auto-sync; native Slack/Teams actions; SSO/MFA support; mobile-first; API access	Manual data entry; notifications only; desktop-only; limited API	Managers log into separate system for every action; no HRIS integration

Score each vendor 1–5 (1 = poor fit, 5 = excellent). Adjust weights to match your priorities.

Dimension (Weight)	What to Evaluate	Excellent (5–4)	Poor (2–1)	Red Flags
Data Quality & Fairness (10%)	Can you trust the data for talent decisions? Does it detect bias?	Bias detection in calibration; audit trails; consistent rating standards; compensation linkage	Opaque scoring; inconsistent metrics; no visibility into rating patterns	No audit trails; unexplainable ratings; goals disconnected from reviews
Vendor Support & Scalability (5%)	Does the vendor help you drive adoption and scale without breaking?	Proven 5,000+ employee rollouts; dedicated success team; change management playbook; reliable at scale	Generic onboarding; sparse post-launch support; unclear escalation path	Vendor disappears after go-live; platform slows during peak cycles; no training resources

HOW TO USE THIS SCORECARD

- 1. Adjust weights** to match your scale (e.g., increase Enterprise Configurability to 25% if you're managing 10,000+ employees across multiple regions, or increase Integration & Technical Fit to 25% if your tech stack is complex)
- 2. Gather evidence** from demos, reference calls, and documentation
- 3. Score each dimension**, calculate weighted totals, and compare vendors
- 4. Monitor post-implementation** — treat this as a living framework and revisit scores after your first review cycle



MAKING THE RIGHT DECISION

Performance management software functions as a long-term operating partner. The vendors that deliver results align with how your managers coach, how your goals adapt, and how your culture operates.

By using a structured evaluation framework, you move past sales pitches to see how each vendor actually runs:

- » How they train managers
- » How they integrate into workflows
- » How they handle data quality and bias
- » How they support you when adoption stalls

The right partner strengthens your operations by supporting confident coaching, keeping goals aligned as strategy shifts, and ensuring performance data informs decisions as work happens.

When a vendor's operating model supports continuous enablement — not annual management — performance becomes a durable advantage rather than a recurring reset.



About Betterworks

This guide is presented by Betterworks, so it's important to acknowledge the perspective behind it.

Betterworks is employee performance management software designed for enterprise organizations. The platform brings goals, feedback, and growth together in one system powered by real-time data. As a result, managers coach with confidence, HR spot patterns earlier, and the business moves faster when empowered through these performance workflows.

Betterworks is built to function as a long-term partner rather than a standalone review tool or rigid HRIS. The platform is designed to fit how organizations run — supporting complex enterprise structures, including multiple departments, locations, and hierarchies.

At the same time, the framework in this guide is intended to help organizations evaluate any performance management vendor objectively. The scorecard and evaluation process focus on what matters most in real deployments. Organizations evaluating Betterworks can apply the same criteria outlined throughout this guide.

To explore the platform in more detail, [speak with a Betterworks expert by requesting a consultation today.](#)

Talk to a performance management specialist:



Get in Touch



betterworks.com