People Program Models

Six approaches to bringing your People strategy to life

Lattice

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Introduction

What are people programs?

People programs bring your People strategy to life. They are the sum of the ways companies exchange information with employees to enable their best work — aligning on goals, providing feedback, and taking and responding to employee input. People programs are unique for every company, influenced by culture, stage in the company's lifecycle, available resources, external forces, and more.

The three main components of a people program are goal alignment, input on employee experience, and performance management. Each of these processes needs to be ongoing, but there are a handful of mile markers throughout the year that should be identified and timed in line with your company's general rhythm:

- For goal alignment, **quarterly individual goal setting** between employees and managers

- For performance management, **review cycles** that pull together feedback and achievement over time, and allow for forward-looking conversations

- For input on employee experience, **engagement surveys** that enable leadership and management to set action plans

By design or not, *all* companies have people programs. But that doesn't necessarily mean they're working with the ones best suited for their business. There are a handful of archetypes, or **people program models,** that companies can look to when revisiting their People strategy.

Lattice Advisory Services helps leaders identify and implement people programs that fit their unique needs. Equipped with industry knowledge, customer data, academic research, and market analyses, we've identified six people program models that work for most organizations, each featuring a unique take on performance, engagement, and goals.

Why focus on goals, reviews, and surveys?

The foundation of your people program consists of three key components: goals, performance, and engagement. How you approach each of these will drive your employee experience, company culture, and business outcomes. And other components like manager one-on-ones, career development, and compensation strategy are all informed by these three elements.

Goals

Goal setting enables employees to see how their work connects to your company's mission. Many organizations use goals as the anchor for expectation-setting, feedback, and measuring performance. If performance reviews are meant to determine whether expectations are being met or exceeded, individuals' goals often serve as the expectations themselves.

Companies can opt for various methods and cadences for goals, but quarterly objectives and key results (OKRs) remain a popular option for their versatility and proven effectiveness. Thousands of organizations across every industry use quarterly OKRs, including household names like Google, Adobe, Microsoft, Netflix, and Yahoo.

We detail this approach in *HR's Complete Guide to Goal Setting*, but in summary, OKRs revolve around two essential questions: "**Where do I want to go?**" (Your objective) and "**How will I get there?**" (Your key results). Objectives tend to be ambitious, pushing beyond what seems possible or even comfortable. Key results break down that objective into three to five realistic, actionable components.

Examples of individual OKRs in sales, client service, and recruiting are listed below.

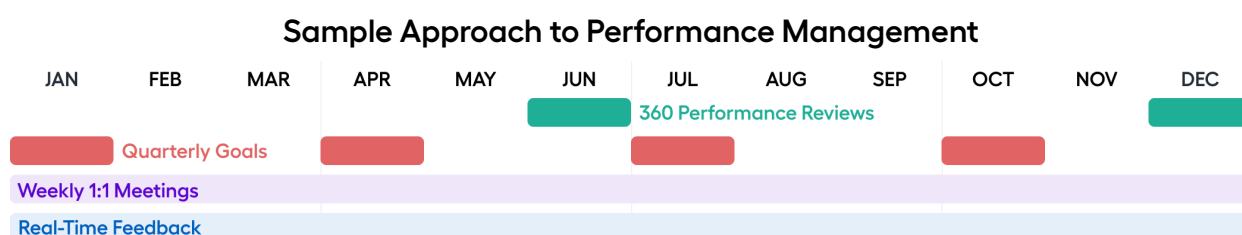| OKR for sales	OKR for client service	OKR for recruiting
OBJECTIVE	**OBJECTIVE**	**OBJECTIVE**
Close $200K in new revenue this quarter.	Delight clients with outstanding service.	Build a best-in-class candidate experience.
KEY RESULTS:	**KEY RESULTS:**	**KEY RESULTS:**
• Demo our product to 100 new sales qualified opportunities • Work with manager on strategies for top five accounts • Attend three industry events	• End the quarter with a service rating of 4.6 or better • Collect feedback from 100 customers • Complete 90% of support requests within first 24 hours	• Implement post-interview surveys • Evaluate five applicant tracking software providers • Conduct five interviewing 101 sessions

While performance review and survey cadence will vary depending on your company's needs, Lattice Advisory Services has found that there are very few companies for whom quarterly goal setting does not work. Goal-setting data from the 2,000 companies that use Lattice shows that over 70% of goal cycles are set to a quarterly cadence.

Implementing top-down OKRs for the first time is a significant commitment, requiring executive, manager, and employee participation. But even if your company doesn't have formal OKRs in place just yet, managers should still collaborate with reports to set quarterly goals. Having manager-employee expectations is a prerequisite for effective, more equitable performance reviews. Lattice research also shows that employees who feel aligned with their manager on their goals had 42% higher engagement than those who didn't.

Performance Reviews

Performance reviews provide employees with the progress markers they need to know whether they're on the path of success. At larger companies without feedback cultures, they may represent one of the few times employees can get a read of how they're doing. They're an opportune time to discuss both past results and the future state — including career growth opportunities.

Goal setting and reviews dovetail together, but that doesn't mean companies with quarterly goals *need* to conduct quarterly reviews. How often you run reviews depends on your organization's speed of change and how quickly employees move up the ladder. The faster employee expectations change, the more frequently they should discuss performance with their managers.

Sample Approach to Performance Management

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

360 Performance Reviews

Quarterly Goals

Weekly 1:1 Meetings

Real-Time Feedback

Reviews represent mile markers for employees and their managers, but they shouldn't be the only time performance is discussed. Manager one-on-ones and ad hoc feedback and praise should feature year-round, filling the gaps between reviews. This approach to feedback keeps performance a year-round priority and helps ensure neither employees nor organizations are left feeling blindsided. Think of reviews as the tent poles for your overall performance program, while continuous feedback, one-on-ones and updates are the tent itself. Without the reviews, all you've got is a flat tarp — with them, you've got an actual structure.

Engagement Surveys

Surveying empowers company leaders to assess the employee experience and engagement levels across the organization. They're also the best way to collect input on other focus areas like belonging, satisfaction, and manager effectiveness. As with performance management, there isn't a "one-size-fits-all" approach to engagement surveying.

The state and trajectory of your company — and even external events, like pandemics and other crises — should influence how often it runs employee surveys. For example, "hypergrowth" companies' employees might experience significant changes quarter over quarter, as headcount and business processes change at breakneck speed. In cases like these, leadership teams may need a more timely read of how those changes impact employees' motivation and ability to produce quality work.

Faster-changing context → More frequent
Slower-changing context → Less frequent

Higher team autonomy → More frequent
Higher team collaboration → Less frequent

Team autonomy is another factor to consider when determining survey cadence. When teams have more autonomy, they can run experiments and make decisions independent of the rest of the company. They're also able to react to survey results and implement changes quickly. More collaborative organizations may need additional time to analyze results and agree on the next steps.

Lastly, remember that quarterly or semi-annual surveys should not stand alone. To bridge the gaps between larger surveys, conduct more frequent pulse surveys. These short, one-to-five question surveys allow you to get a more continuous picture of your employee engagement strategy's effectiveness. You can learn more about pulse surveys in *How to Use Real-Time Engagement to Build a Winning Culture*.

6 People Program Models to Consider

Goal setting, performance management, and engagement surveys are the three foundational components to your people program. But as already discussed, the combination and timing of these will need to reflect several factors, including your business's pace of change, the speed at which employees progress, and how independently teams operate. Goal, review, and survey cadence will also inform other components of your People strategy, including employee development, compensation cycles, and more — making them especially important to get right.

Lattice has enabled over 2,000 companies to deliver on their People strategies and build award-winning workplaces. We've worked with organizations that conduct quarterly, semi-annual, and annual reviews and engagement surveys — and a handful that defy categorization. Those experiences gave Lattice Advisory Services a deeper understanding of not just what models companies *can* choose but which they *should* choose. We've broken these down into six easy-to-remember archetypes.

Individual Goal Cycle

Employee Survey Cycle

	2X4 2 Reviews x 4 Surveys / year	**4X4** 4 Reviews x 4 Surveys / year	**ADAPTIVE** Project- or Anniversary-based Reviews x 2-4 Surveys / year
1X2 1 Review x 2 Surveys / year	**2X2** 2 Reviews x 2 Surveys / year	**4X2** 4 Reviews x 2 Surveys / year	

QUARTERLY

QUARTERLY

SEMI-ANNUAL

ANNUAL   **SEMI-ANNUAL**   **QUARTERLY**   **NON-CALENDARED**

Performance Cycle

For each of the above, we'll share the ideal company profile and examples of the model in practice. Each of these recommended programs assumes a quarterly goal-setting cadence, with one exception being the "adaptive" model. As discussed earlier, Lattice data shows that quarterly renewal remains the most popular option for individual goals, and our People Consultants recommend them in virtually all cases.

The 2x2 Model
Semi-Annual Reviews and Surveys

Who it's for:

- Companies of any size with predictable growth
- Industries not subject to frequent, destabilizing change
- Workplaces with ample cross-team collaboration

Call it the "Goldilocks" of the program models. In most cases, Lattice Advisory Services finds that semi-annual reviews and surveys give organizations the right mix of agility and practicality. This model also works for companies growing at a slower and faster clip — as long as that growth is *stable*.

Even in workplaces still developing their feedback culture, conducting semi-annual reviews gives individuals enough opportunity to reflect on and course-correct performance issues. On the surveying front, running semi-annual surveys and more frequent pulses also gives HR leaders and managers enough data to work with without risking survey fatigue.
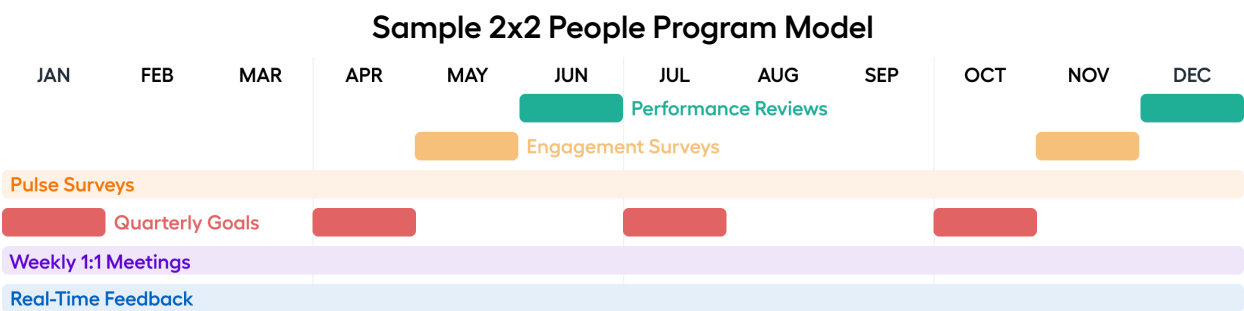
From Lattice Advisory Services:

"An approach we've seen work well is to conduct your first engagement survey before annual planning to get a baseline. That way, your results can influence that plan and you can course-correct six months later."

— **Julia Markish**, Director, Advisory Services

What it might look like:

- **Semi-annual reviews**: Annual 360-degree performance review, with a lighter cycle in the opposite quarter, incorporating ongoing feedback and updates

- **Semi-annual surveys**: Annual baseline engagement survey prior to the annual planning cycle, with a lighter survey in the opposite quarter, with pulse surveys in-between

- **Quarterly goals:** Organization renews goals annually and leadership reviews quarterly, individuals renew goals quarterly and review monthly with their managers

Sample 2x2 People Program Model

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

Performance Reviews

Engagement Surveys

Pulse Surveys

Quarterly Goals

Weekly 1:1 Meetings

Real-Time Feedback

The 2x4 Model
Semi-Annual Reviews and Quarterly Surveys

Who it's for:

- Companies of any size with predictable growth
- Industries not subject to frequent, destabilizing change
- Workplaces with largely independent/autonomous teams

This model is best suited for organizations with autonomous teams. In cases where teams work on specialized projects that don't intersect, company-wide surveys won't give you enough specificity. Landing on a mix of questions that apply to everyone's day-to-day also won't be feasible, making it difficult for teams to map a response. Department-level surveys can give you the specific, actionable feedback you need in cases like these.

Still, there's value in identifying trends across the business, since elements like psychological safety and belonging apply universally. Companies that implement the 2x4 should consider alternating between company-wide and department surveys every quarter.
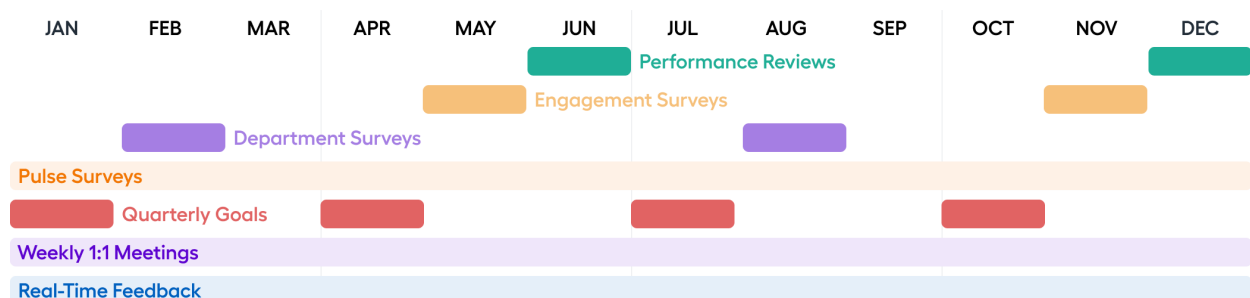
From Lattice Advisory Services:

"Consider a law firm with separate practices, like family law, intellectual property, and trial law. Each has its own needs and cultures, and because they operate independently, they can make decisions and changes faster — allowing for more frequent, team-focused questions."

– **Julia Markish**, Director, Advisory Services

What it might look like:

- **Semi-annual reviews**: Annual 360-degree performance review, with a lighter cycle in the opposite quarter, incorporating ongoing feedback and updates
- **Quarterly surveys**: Annual baseline engagement survey, lighter survey in the opposite quarter, lighter-weight team-focused surveys in-between
- **Quarterly goals:** Organization renews goals annually and leadership reviews quarterly, individuals renew goals quarterly and review monthly with their managers

Sample 2x4 People Program Model

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

Performance Reviews

Engagement Surveys

Department Surveys

Pulse Surveys

Quarterly Goals

Weekly 1:1 Meetings

Real-Time Feedback

The 4x2 Model
Quarterly Reviews and Semi-Annual Surveys

- Those with predictable growth and few abrupt business changes
- Employee roles and responsibilities shift quickly

When roles and responsibilities change so fast that your annual or semi-annual reviews can't keep up, it's worth giving managers and employees additional touchpoints along the way. In environments like these, the 4x2 empowers managers to give relevant, timely feedback.

This approach aligns with quarterly goals, meaning that OKRs could guide the conversation. Still, it's important to encourage one-on-ones and ongoing feedback, as employees need a chance to course-correct *before* the review. Another way to distinguish these reviews is to split them into **performance** and **development** reviews. In the calendar below, note that performance reviews occur in January, but development reviews are scheduled every remaining quarter. The latter encourages teams to reflect on progress and set growth goals.

From Lattice Advisory Services:

"Consider an established direct sales company where sales representatives advance quickly through the ranks. They might move between job levels within months, not years. A business like this would be a prime candidate for this model."

– **Julia Markish**, Director, Advisory Services

What it might look like:

- **Quarterly reviews**: Annual 360-degree performance review, lighter quarterly check-ins

- **Semi-annual surveys**: Annual baseline engagement survey prior to the annual planning cycle, with a lighter survey in the opposite quarter, with pulse surveys in-between

- **Quarterly goals** Organization renews goals annually and leadership reviews quarterly, individuals renew goals quarterly and review monthly with their managers

Sample 4x2 People Program Model

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

Performance Review

Development Reviews

Engagement Surveys

Pulse Surveys

Quarterly Goals

Weekly 1:1 Meetings

Real-Time Feedback

The 4x4 Model
Quarterly Reviews and Surveys

- Workplaces where goals, roles, and responsibilities shift quickly
- Business or market context in flux
- Highly independent, autonomous teams

For some companies, change is the only constant. Employee roles and responsibilities might change quarter by quarter. Promotions might take just months, not years, to earn. The business may be subject to dramatic pivots or explosive headcount growth, effectively being forced to reinvent itself every few months. In environments like these, more frequent reviews and surveys may be what's needed to keep up.
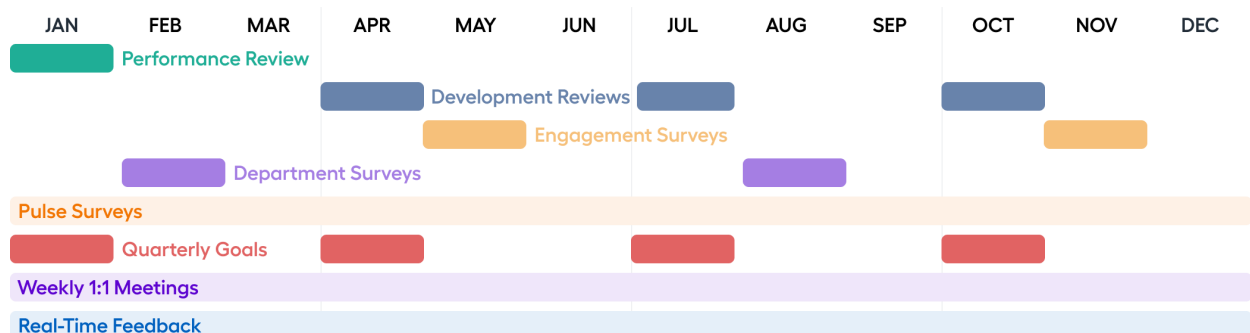
From Lattice Advisory Services:

"The 4x4 is often the ideal model for startups. A fast-growing company in a fast-changing environment would most benefit from quarterly check-ins with their employees and quarterly look-backs on their employees' work. Anything less frequent risks missing important opportunities for course corrections"

– **Julia Markish**, Director, Advisory Services

What it might look like:

- **Quarterly reviews**: Annual 360-degree performance review, quarterly lighter check-ins
- **Quarterly surveys**: Annual baseline engagement survey, lighter survey in the opposite quarter, team-focused surveys in-between
- **Quarterly goals**: Organization renews goals semi-annually and leadership reviews quarterly, individuals renew goals quarterly and review monthly with their managers

Sample 4x4 People Program Model

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

Performance Review

Development Reviews

Engagement Surveys

Department Surveys

Pulse Surveys

Quarterly Goals

Weekly 1:1 Meetings

Real-Time Feedback

The 1x2 Model
Annual Reviews and Semi-Annual Surveys

Who it's for:

- Monolithic organizations with static employee expectations
- Little to no variation in business or market
- Ample cross-team dependencies

This model features just one review and two surveys, making it one of the most lightweight models available. While easy to administer, it's reliant on managers to follow through on performance conversations during one-on-ones. While developing a culture of ongoing feedback is advisable, reviews serve as a nudge to ensure these conversations are happening.

In most cases, Lattice Advisory Services recommends choosing a more robust model. Still, there are environments where the 1x2 may be a viable option. Companies with static employee expectations and little variation in their business might find it suitable, as long as managers and employees exchange feedback year-round. Smaller organizations without formalized job levels may also find use from the model in the short term.
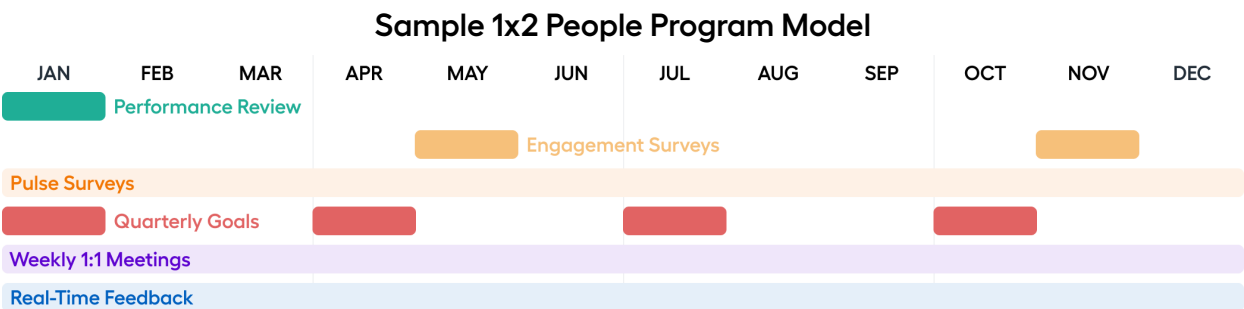
From Lattice Advisory Services:

"There isn't a model where we don't recommend running at least two surveys per year. Even in the absence of business uncertainty, sentiment will reflect factors like peer relationships, manager effectiveness, culture, and external events."

– **Julia Markish**, Director, Advisory Services

What it might look like:

- **Annual reviews:** Annual 360-degree performance review
- **Semi-annual surveys:** Annual baseline engagement survey with a lighter survey in the opposite quarter, with pulses keeping track of critical metrics and initiatives in-between
- **Quarterly goals:** Organization renews goals annually, individuals renew goals quarterly

Sample 1x2 People Program Model

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

Performance Review

Engagement Surveys

Pulse Surveys

Quarterly Goals

Weekly 1:1 Meetings

Real-Time Feedback

The Adaptive Model
Flexibility for Project-Based Work

Who it's for:

- Project-based business models
- Workplaces where employees move quickly through roles or between teams
- Highly independent, autonomous teams

The "adaptive" model is suited for organizations whose work doesn't fit neatly on a traditional calendar. These companies tend to operate as project-based businesses, with goals and reviews aligning to the start and completion of those assignments.

In this model, reviews align to the middle and end-points of a project. There are also some job tracks where anniversary-based cycles are more appropriate. In both cases, it may still make sense to have an annual check-in for calibration or if the company ties performance to compensation. Conducting both company and department-level surveys may be advisable given that individual teams may be working on different projects and hardly interface at all.
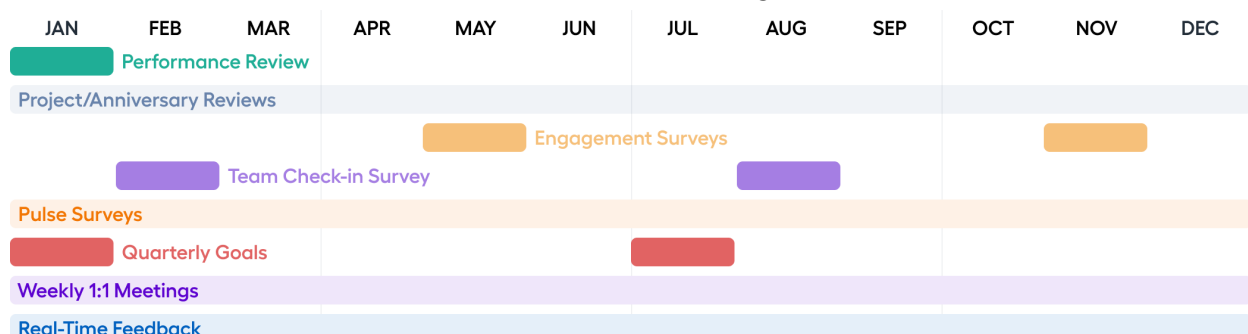
From Lattice Advisory Services:

"When employees are evaluated primarily on completing an assignment, that project's timeline *could* dictate your goal-setting cadence. For example, while a year-long consultant-client relationship might lend itself to quarterly goals, shorter engagements may need a more compressed timeline."

– **Julia Markish**, Director, Advisory Services

What it might look like:

- **Non-calendar-driven reviews**: Project-based or anniversary-based reviews
- **Quarterly surveys**: Annual baseline engagement survey, lighter survey in the opposite quarter, lighter-weight team-focused surveys in-between
- **Quarterly goals**: Individuals renew goals on a per-project basis

Sample 'Adaptive' People Program Model

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC

Performance Review

Project/Anniversary Reviews

Engagement Surveys

Team Check-in Survey

Pulse Surveys

Quarterly Goals

Weekly 1:1 Meetings

Real-Time Feedback

Finding Your Model

Each of the people program models we've discussed has a purpose and fit. Whatever approach you choose, it must match your organization's size, pace of change, structure, and company culture.

It's also important to be realistic when implementing new people programs. Consider the time commitment involved and your HR and management teams' bandwidth. What kind of change management would need to occur to implement the model? Are you able to commit enough resources to achieve this? The models we described may represent the ideal, but only you can identify what's actually realistic given business realities.

While quarterly cadences for reviews and surveys drive higher engagement scores, not all organizations have the resources and bandwidth to implement them. **For that reason, the 2x2 model offers the right mix of practicality and impact for most companies.** Not only has Lattice Advisory Services seen it succeed at most of the companies we support, we've also researched their efficacy. Our data shows that companies that adopt semi-annual (or more frequent) cadences are:

- Less likely to perceive their HR team's work as "low value"
- Less likely to report frustration with professional growth opportunities
- More likely to perceive performance management as a strategic focus
- More likely to grow headcount over time

If needed, take it slower by working toward your ideal program incrementally. Sometimes, it means settling into a less frequent cadence for the foreseeable future, like going for a 2x2 even if 4x2 or 4x4 is the "right" solution for your business. When it comes to performance reviews and surveys, more is more — when feasible. With respect to engagement scores, our research shows that semi-annual cadences lead to better outcomes than annual ones. Similarly, running reviews and surveys annually may not be ideal, but it's better than not running them at all.

If you're on the fence about which approach is best for your company, our team can help. Lattice helps leaders identify and implement the people program that best fits their unique needs. We'll work with you to first understand your business cadence, trajectory, team autonomy, and other considerations. From there, we'll prescribe a model that doesn't just address reviews, surveys, and goals, but also includes recommendations on:

- Employee development planning
- Compensation cycle timing
- Engagement survey questions and length
- Equitable performance management
- HR analytics and survey action planning
- Pulse survey best practices

To learn how Lattice can help you build an engaged, high-performing workplace that delivers results for individuals and the business, schedule a call with us today.

About Lattice

Lattice is a people management HR software company that aims to help companies drive and retain engaged, high-performing teams.

Lattice's product offerings include a continuous performance management suite as well as engagement surveys and analytics. With Lattice, it's easy to launch 360 reviews, share ongoing feedback and public praise, facilitate 1:1s, set up goal tracking, and run employee engagement surveys.

By combining performance management, employee engagement, and career development in one solution, HR teams get powerful analytics that leads to actionable insights. Lattice is the only company that offers all three of these tools in one solution.

Lattice works with companies who aspire to put people first and see people as part of how they'll be successful. Whether redefining the beauty industry or building self-driving cars, all of our customers have one thing in common: they value their employees and want to invest in the growth and success of their people.

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