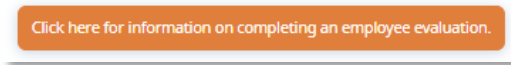




myPerformance FAQs

Introduction to On-demand Training

Please note that Gallagher Personal Support (GPS) is an on-demand resource available for all Employees to help navigate myHR applications with ease. GPS offers just-in-time support and instructions when completing activities in our HR systems.



Look for this guidance within myPerformance modules for instructions for how to complete tasks and answers to many frequently asked questions.

myPerformance System and Cycle FAQs

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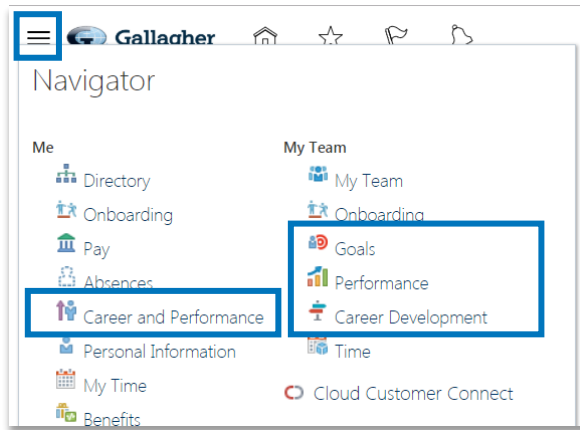
myPerformance System FAQs

Q: How do I access myPerformance? Am I able to access the system when not on the Gallagher Network?

A: You can access myPerformance on and off-network through myHR.

Login to myHR at: www.ajg.com/myHR

- To access your myPerformance modules, click the navigator on the top left → About Me → Career and Performance
- To access your team’s myPerformance modules, click the navigator → My Team → select the desired Career and Performance module



If you are unsuccessful in accessing the site, please send an email to myPerformance@ajg.com.

Q: Where can I access myPerformance training and resources?

A: You can access all of the necessary myPerformance resources both on and off network at www.ajg.com/myPerformance.

Q. Which Web browser is best for accessing myHR/myPerformance?

A: myPerformance will work in any of the common Web browsers. However, myHR and all of the associated modules, including myPerformance, is optimized using the Microsoft Edge and Google Chrome browsers.



Q: Am I able to access myPerformance from my mobile device?

A: Yes. There is no mobile app for myPerformance, but you can access myHR and the Career and Performance modules from your mobile browser by going to www.ajg.com/myHR and using your Gallagher username (e.g., jsmith) and password (the credentials you use to log onto your computer).

Q: Can I access my previous Performance Appraisals in myHR?

A: No. Historical Performance Appraisals prior to 2019 are not available in myHR. However, performance ratings for 2018 and before are accessible in myHR in the Document of Record.

- [How do I review my rating history?](#)
- [How to I review my Employee's rating history?](#)

Q: Why am I having browser resubmission and time out issues in myHR?

A: myHR and the myPerformance modules work optimally when you navigate within the system itself. Avoid using the back and forward arrows in your browser. It's also a good idea to clear your internet cache before extensive use of myPerformance to ensure peak functionality.

If you continue to have issues, contact myPerformance@ajg.com.

Q: Will I lose all of my progress if I forget to save?

A: myPerformance will auto save any details you input every 3 minutes in the background. However, it is a good idea to click Save anytime you have made significant updates to a form or plan to transition to another activity.

Q: Is there a size or limit to attachments in myPerformance?

A: myPerformance gives you the option to attach documents and files to your Performance Goals and Performance Evaluations. The maximum single file size is a 5GB attachment. You may attach up to 10 documents to each form.

Q: Who should I contact with myPerformance questions?

A: If you have questions regarding your eligibility or the myPerformance process, please contact your local HR Business Partner.

If you have technical questions or concerns, please contact the Help Desk at myPerformance@ajg.com.



myPerformance Process Questions

Q: What is the myPerformance process?

A: myPerformance is a continuous and ongoing process that occurs on an annual performance cycle, with Performance Goal setting at the beginning of the performance year and Performance Evaluations at the end of the year. In between these milestones, myPerformance promotes and supports continual performance conversations and activity enabled through additional modules.

Q: What parts of myPerformance are mandatory?

A: Performance Evaluations are mandatory for eligible Employees. You will be considered an eligible Employee and required to complete a 2023 Performance Evaluation if you are hired before October 1, 2023, or if you were part of an acquisition prior to October 1, 2022. There are additional eligibility considerations and exceptions to this, so please work with your local HR business partner if you are unsure of your eligibility.

Performance Goals are strongly recommended and may be mandatory for your division, region, or function. Check with your Manager to determine how your team utilizes Performance Goals.

Additional modules including Check-ins, Ongoing Feedback, and Career Development are available in myPerformance to better enable you to own your performance experience, drive your development, and grow your career at Gallagher. These modules are not mandatory but are available to provide you with the confidence, resources, and platform you need to be successful. They can be documented in the myPerformance system and are also leading practices that Employees are encouraged to participate in to own their career and performance experience.

To learn more about myPerformance and its enhancements, visit <http://www.ajg.com/myPerformance>

Q: I am a Manager and I can only see my Career and Performance modules. How do I access my team's information?

A: myPerformance separates your personal Career and Performance module information from your team's information. Try clicking on the navigator on the top left of the screen. Under **My Team**, you can select **My Team** for a view of your team, or you can click directly into the module you wish to review.

Q: What happens if my line Manager changes during the performance year?

A: myPerformance will automatically carry over your current Performance Goal Plan to your new Manager. It is up to you and your new line Manager to determine if your Performance Goals should be updated or if new ones need to be created. At the end of the year, your current Manager will be responsible for completing the Manager Evaluation portion of the Performance Evaluation. Both you and your new Manager have the option to request feedback from the former Manager to incorporate their feedback into your evaluation.



Performance Goals

Q: What does it mean to cascade goals?

A: Leading Performance Goal practices align individual Employees, teams, and organizational goals. To achieve annual goal alignment at Gallagher, executive leadership reviews their business outcomes and sets their divisional Dominant Priorities in alignment with the global business priorities. The divisions then cascade these goals to their regions, functions, and teams to link and align their Performance Goals to achieve individual and organizational success. myPerformance gives Managers the platform to cascade Performance Goals to their teams to align their work efforts. Work with your Manager to best understand how your team develops and/or cascades Performance Goals.

Q: Is there a character limit to goal descriptions?

A: There is a 4,000 character limit for Goal descriptions. If you are exceeding that limit, you may be providing too much detail for the goal description and may consider using the comments section to include some of that detail. If more space is required, you can attach the details to the goal in an external document.

Q: Do Performance Goals need to be approved?

A: No, Performance Goals that are either updated or created by an Employee will not need to be approved by their Manager. Managers will not be notified of updates, and please be sure to connect regarding relevant goal additions or updates.

Q: Can I copy or move Performance Goals over from year to year in myPerformance?

A: In myPerformance, you will be able to **Copy** or **Extend** existing Performance Goals from one year to the next. **Copying** a Goal will allow you to create an identical version of the Goal and allow you to update the details. If you choose to **Extend** a Performance Goal, you will extend the target completion date of the Goal into the following year, creating a multi-year Goal with the same properties.

Q: How do I edit a Performance Goal if the description and details are greyed out?

A: If the Goal description and details are greyed out, then you do not have the ability to edit the Goal. Utilize the Goal comments to document any pertinent information of the Goal you are wishing to change.



Q: Can I add attachments to my Performance Goals?

A: Yes. At the bottom of the goal detail page there is an **Add Attachment** button. One attachment has a size limit of 5GB and you can attach up to 10 documents total.

Q: My team's Performance Goals were assigned by HR. If I have a new team member starting, will they have the Performance Goals automatically assigned as well?

A: New Employees will not have goals automatically populated in their Goal Plan. myPerformance updates on a weekly basis and new Employees will have access to their current year Goal Plan within a week of their start date, but Performance Goals will not be automatically assigned. They will need to work with their Manager to create their Performance Goals or have the Manager assign their own goals to them.

Q: What happens if I click Cancel in the Performance Goal detail page?

A: If you click **Cancel** on the Performance Goal detail, you will exit out of the Goal details and remove any updates or edits you may have made.

Q: Is there a sliding scale for Performance Goal progress in myPerformance?

A: In myPerformance you can update your Performance Goal progress by selecting the closest increment that most represents your completion percentage (0%, 25%, 50%, 75%, or 100%).



Performance Evaluations

Q: What is the Performance Evaluation process?

A: At the end of the year, an Employee's performance is summarized and assessed. Managers provide an annual performance rating based on the Employee's performance on their goals, as well as how the Employee accomplished their work and goals and exhibited alignment with cultural values. Performance Evaluations provide an opportunity for both the Employee and Manager to align on performance results and expectations.

The process kicks off at the end of the performance year (usually around December) and typically follows the steps below:

1. The Employee completes a self-evaluation, where they have the option to document progress on their Performance Goals and provide examples of their performance throughout the year.
2. Manager reviews an Employee's self-evaluation and provides a rating. They have the option to provide comments on their Performance Goals, give examples of their performance, and comment on their performance as a whole.
*Note: The myPerformance system will automatically sync your prior year's goals with the current year's performance cycle.
3. Employee and Manager have a Performance Evaluation conversation, during which they discuss the Employee's performance for the year, strengths, developments, career aspirations, and in many cases, expectations and goals for the next year.

Q: What information needs to be included in a Performance Evaluation?

A: A Performance Evaluation is an annual summary of an Employee's performance and conversation with their Manager to recognize great work, discuss developmental opportunities, and consider career aspirations. For more information on completing Performance Evaluations as an Employee and/or a Manager, take a few minutes to review the [Performance Evaluation Overview](#).

Q: Is the Performance Evaluation conversation mandatory?

A: Yes, the Performance Evaluation conversation is mandatory. Employees and Managers use this time to discuss and align on past and current performance results, and future expectations. The Managers use this opportunity to explain the Employee's performance rating and provide feedback.

If you have questions or concerns regarding the Performance Evaluation conversation, please contact your local HR Business Partner.



Q: Can I include feedback from matrix Managers or other colleagues in my Performance Evaluation?

A: Yes. Both Employees and Managers both have the opportunity to request feedback from colleagues for consideration in the Performance Evaluation. When making the feedback request, you can select whether you would like the feedback to be visible to the Employee or Manager.

For detailed guidance about how to request feedback in myHR, reference "*Need Help? Ask GPS*" in myHR or www.ajg.com/myPerformance for one-page guides.

Q: Are there Mid-year Reviews in myPerformance?

A: As of now, there isn't the capability to do formal Mid-year Reviews in myPerformance. However, myPerformance does have the Check-in capability, which gives Employees and Managers the opportunity to own and document any performance conversation. These can include small, ad-hoc check-ins or more detailed performance conversations, similar to a Mid-year Review.

Q: Can I add attachments to my Performance Evaluation?

A: Yes. At the bottom of the Performance Evaluation form there is an **Add Attachment** button. One attachment has a size limit of 5GB and you can attach up to 10 documents total.

Q: Can I update my Performance Goals after I start the Performance Evaluation?

A: Yes you can! You can review your goal plan and add comments through the Goals screen of your Performance Evaluation, and you can edit the goal progress or description within the Performance Goal module. You will be able to update your goals until the Performance Evaluation is submitted by your Manager.

Q: Can I transfer an Employee's Performance Evaluation?

A: The myPerformance system will recognize a change in reporting and automatically move an Employee's performance documents to their new Manager. This auto-transfer process is continual and is not dependent on a time frame. The myPerformance system also provides a manual transfer option to be used as needed. Both Managers and HR have the ability to transfer an Employee's Performance Evaluation. *Note that Performance Evaluations should only be transferred to other Managers. If transferred in error, please submit a request to myPerformance@ajg.com.

Q: What happens if I accidentally submit my Performance Evaluation accidentally or too soon?

A: You can email myPerformance@ajg.com or your local HR business Partner to have them move the Evaluation back to the desired step.



Q: When will my Employees see their performance rating and comments?

A: When a Manager completes a Performance Evaluation and “Submits” it, Employees will receive notification of the evaluation with the performance rating and comments. If Managers wish to have the Performance Conversation prior to submitting, save the form (or allow it to auto save) and come back and submit when it’s appropriate.

Q: Do I need to sign-off and acknowledge my Performance Evaluation?

A: No, Employees are not required to sign-off and acknowledge that they have had a Performance Evaluation conversation with their Manager. If you have any questions after your Performance Evaluation conversation, please contact your local HR Business Partner.



Check-ins

Q: What are Check-ins?

A: Check-ins are the conversations you have, typically with your Manager, about the work you do with the goal of improving performance and enabling professional growth. Check-ins:

- Are the cornerstone of ongoing performance management and driving towards better results.
- Build trust and strengthen the working relationships of Employees. Successful working relationships lead to Employees and Managers having more engagement and enjoyment of their work and create environments that increase influence, innovation, creativity and success.
- Allow team members to set expectations for the near term, review priorities, comment on recent work, and provide course correction, coaching, or important new information. Most importantly these conversations can lead to better results.
- Can give clarity regarding what is expected of each team member and why, what great work looks like, and how each can do his or her best work.

Q: What do the performance ratings mean for Check-ins?

A: Managers have the option to provide a rating for the Employees to document their current performance as “On Track” or “Off Track” based on the conversation. What is discussed, as well as support for the rating should be documented in the comments.

On Track means the Employee’s performance is meeting and/or exciting expectations, and Off Track means the Employee’s performance does not currently meet expectations.

Q: Are the Check-in ratings included in the Annual Performance Evaluations?

A: No. The ratings are optional and do not factor into the annual Performance Evaluation. However, Managers and Employees should consider these factors as they determine an annual performance rating.

Q: How often should I have Check-ins?

A: There is no perfect timing or structure to a Check-in. They can be completed at any cadence based on availability and needs.

For guidance on timing, structure, format, and more, review the short Check-in Overview course at www.ajg.com/myPerformanceCheckinsOverview.



Q: Can I create a Check-in with someone who isn't my direct Manager/Employee?

A: Check-ins can occur among any colleagues at Gallagher, however, myHR currently allows Check-ins to be documented between Employees and their direct line Manager only.

Q: How many Check-ins can I create?

A: There is no limit to the amount of Check-ins that can be created in myHR.

Q: Can I edit a Check-in that's already created?

A: Yes. Check-ins can be edited throughout the year. It's recommended that you create a new Check-in document for each occurrence to help keep track of performance conversations over time.

Q: Can I delete a Check-in?

A: Check-ins can be deleted ONLY if the other individual (Employee or Manager) has not edited the Check-in form. Once the fields have been edited, Check-ins cannot be deleted.

Q: Where do I edit/create Check-ins for my Employees?

A: The Check-in screen for your Employees is in a different location than where you would go to submit one for yourself. To find your Employee's Check-ins, go to myTeam → Select the Employee name → and then Performance on the left side bar.

Note you may have to click "Show More" to view all of the options on the left side bar.

Q: Will I be notified of a Check-in?

A: You will receive an email notification and a bell notification in myHR when a Check-in document has been created by your Employee or Manager. You will only receive a notification upon creation and not when the document has been edited.



Career Development

Q: What is Career Development?

A: Career Development is the collaborative planning, conversations, and activities that Employees, supported by their Manager, engage in to accomplish professional growth and goals. At Gallagher, Employees are the architects of their own careers and can use myPerformance to help drive their own development.

Check out this quick [overview](#) for more information on Career Development, including Gallagher's Career Development Framework and how to use myPerformance.

Q: What are Career Development Goals?

A: Career Development Goals are goals defined by an Employee to support long term growth and development.

Q: How are Career Development Goals different than Performance Goals?

A: Performance Goals are the goals that Employees set annually that define their performance objectives and targets for the annual performance year. These are based on the Employee's role, and business or team objectives. Career Development goals are long-term and focus on ongoing personal and career growth. Career Development goals are unique and personal to the Employee.

Q: Why am I unable to see my Career Development Goals or my Employee's Career Development Goals?

A: Check the Zoom setting on your web browser. If your browser is set to a high zoom, the goals may not appear.

Q: Do I need my Manager to approve my Career Development Goals?

A: No, Career Development Goals do not need to be submitted for Managerial approval. Because Career Development Goals are personal and long term, Employees should collaborate with their Managers for help in their development.



Q: Do Career Development Goals get pulled into my annual Performance Evaluation?

A: No. Career Development Goals operate differently than Performance Goals, and are not pulled into Performance Evaluations. As mentioned above, Performance Goals are the goals that Employees set annually that define their performance objectives and targets for the annual performance year. These are based on the Employee's role, and business or team objectives. Career Development goals are long-term and focus on ongoing personal and career growth. Career Development goals are unique and personal to the Employee.

Q: What is a Career Statement?

A: A career statement is your chance to define your personal career brand, show off your strengths, shout about your achievements and share your career aspirations. It should be a small, bite-sized representation of who you are as a professional, and what you have to offer in terms of experience and ambition.

Q: What are Career Preferences?

A: Career Preferences are potential career conditions that you should consider as you think about your long term development. This information is there for you to help get started on thinking about your career development, the opportunities and considerations, and to help frame any career development conversations.

Q: What are Tasks for Career Development Goals?

A: Tasks are an optional feature for defining Career Development Goals. These allow you to define the details and steps you plan to complete to achieve your goals.