



The Filipino Offshore Leadership System



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Leading Filipino Offshore Teams

Manager's Toolkit

Everything you need to build a team that performs, stays, and grows.



Why This Matters

Your Filipino team has what it takes to deliver.

They're loyal. Adaptable. Great with people. The question is whether they feel safe enough to show it.

This toolkit helps you create that environment *and* keep it. When you get this right, you get fewer surprises, less rework, and a team that actually sticks around.

What Kapwa means for you as a manager

Kapwa is a Filipino concept. Roughly: we're all in this together. It's not just cultural. It's a leadership approach.



What you do	Why it matters culturally	What happens as a result
Build trust early	Filipino teams value relationships. Trust first, task second.	People feel safe to speak up.
Set clear expectations	Employees won't always push back on unclear instructions. They'll just try to figure it out.	Less miscommunication = less rework.
Ask questions, not just for updates	Silence doesn't mean agreement. It often means respect and uncertainty.	You catch problems before they grow.
Follow up in writing	Indirect communication is the norm. Written clarity removes guesswork.	Fewer misunderstandings.
Trust them to lead	People perform best when they feel included and trusted.	A team that owns its work.

What this toolkit helps you do

You own the day-to-day. HR is there for the complicated stuff policy, compliance, escalations. This toolkit covers everything in between.

Use it to:

- **Get new people up to speed faster.**
- **Catch problems early before they become expensive.**
- **Have real conversations about performance.**
- **Build a team that can eventually run without you hovering.**
- **Reduce the risk of losing good people.**



Who Does What?

Person	Their job
You (the manager)	Day-to-day leadership, coaching, feedback, performance conversations, documentation.
Client / Business Lead	Sets the business direction and priorities.
HR Business Partner	Complex cases, policy questions, compliance.

The Employee Life Cycle

Here’s how to think about the full journey — from day one to the day they leave.



Stage	What you do	Tools available
Onboarding	Set clear expectations. Introduce how the team works. Start building trust.	Onboarding Checklist, Role Guide, Culture Guide
Goal Setting	Align their goals to what the business actually needs. Include behaviour, not just output.	SMART+Impact Template, Goal-Setting Script
Coaching & Check-ins	Give regular feedback. Watch for overload. Keep the conversation going.	GROW Coaching Template
Quarterly Review	Check progress. Course-correct early. Note what’s working and what isn’t.	Quarterly Review Form, Discussion Guide
Annual Review	Look at the full year. Plan their development. Talk about salary, benefits, and where they’re headed.	Annual Review Template, IDP, Pay-for-Performance Guide
Career Growth	Have real conversations about their future. Update their development plan.	IDP Template, Career Development Guide
Exit	Capture what they know. Do an exit interview. Leave the door open.	Exit Checklist, Knowledge Capture Form

Your annual calendar

Plan your year so you're not caught off guard. Note: the "ber months" (September–December) are the start of the holiday season in the Philippines. Plan for celebrations, not just deadlines.

Quarter	What to focus on	Cultural moments to acknowledge
Q1 (Jan–Mar)	Set goals for the year. Run performance and career conversations. Kick off development plans. Review salaries.	Welcome the new year. Recognise last year's wins. Plan around Holy Week.
Q2 (Apr–Jun)	Mid-year check-in. Review development progress. Keep the coaching going.	Birthdays, work anniversaries, team-building moments.
Q3 (Jul–Sep)	Realign goals if needed. Q3 review. Check in on where people are at.	"Ber months" start — acknowledge the season. Celebrate milestones.
Q4 (Oct–Dec)	Year-end review. Holiday planning. Leave coordination. Year-end recognition.	All Souls Day. Holiday baskets. Year-end celebrations. Shut-down planning.
Every month	1:1s. Feedback. Workload check. Celebrate small wins.	Personal shout-outs, family milestones, team recognition.

Reminder

Recognition goes a long way. A shout-out during a team call. A message on a work anniversary. These are not extras — they're how trust gets built over time.



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MANAGER'S TOOLKIT | MODULE 02

The Employee Relationship Cycle

Coaching, Feedback, and Performance Enablement

How to build strong relationships, develop talent, and sustain high performance across the full employee journey.



MODULE OVERVIEW



What's In This Module

This module guides managers through building and sustaining strong employee relationships at every stage of the lifecycle. Coaching, feedback, and performance enablement are built in throughout. When you do this consistently, you build trust, keep people engaged, and develop a team that delivers.

Section	What It Covers
The Employee Relationship Lifecycle	The full journey from onboarding to exit, with manager actions, tools, and cultural notes for each stage.
Coaching Philosophy	The principles behind effective coaching for Filipino teams.
Coaching Conversations Framework	A step-by-step structure for every coaching conversation.
The GROW Coaching Model	How to use Goal, Reality, Options, and Way Forward in practice.
Feedback Best Practices	What to do, what to watch out for, and sample language.
Performance Enablement	How to set conditions for high performance throughout the lifecycle.
Manager Tips for Filipino Teams	Practical reminders for culturally informed leadership.
Coaching Session Tracker	A documentation tool for tracking coaching conversations over time.



FOUNDATION



The Employee Relationship Lifecycle

The employee lifecycle describes the stages of an employee's journey, from onboarding to exit. At each stage, managers have a clear role: **build strong relationships, develop talent, and sustain high performance.**

This module focuses on the relationship and coaching layer that sits across all lifecycle stages. The tools here do not replace the stage-specific modules. They run alongside them.



The employee lifecycle is not just a process. It is a relationship that managers actively shape at every stage.

Stage	Objective	What You Do	Tools	Cultural Notes
Onboarding	Build clarity, confidence, and cultural alignment from Day 1	Set expectations, clarify role, introduce workflows, meet the team and stakeholders, 30-60-90 day success roadmap, integrate Filipino principles	Onboarding Checklist, Role Guide, Culture Guide	Establish shared understanding of team norms, relationships, and shared responsibilities
Goal Setting	Align individual goals with company and client objectives	Align individual and team goals to business impact, set skill development goals, define clear success metrics	SMART+Impact Template, Goal-Setting Script	Include behavioral and cultural expectations; link goals to team harmony and collaboration



Stage	Objective	What You Do	Tools	Cultural Notes
Coaching and Check-ins	Drive continuous improvement and prevent performance drift	Continuous feedback, workload monitoring, performance support, early escalation guidance, real-time feedback, capacity and well-being check	GROW Coaching Template	Career conversations quarterly; monitor quiet dedication to prevent burnout; celebrate small wins
Quarterly Review	Evaluate progress and recalibrate	Track progress, course-correct, flag risks, KPI and SLA review, strengths and growth areas, client feedback, engagement discussion, adjust goals	Quarterly Review Form, Discussion Guide	Highlight skill development, career aspirations, and cultural contributions
Annual Review	Holistic performance evaluation	Consolidate quarterly performance, full-year summary, behavioral and core value assessment, impact on team and clients, discuss IDP, salary, benefits, and career progression	Annual Review Template, IDP, Pay-for-Performance Guide, Total Rewards Summary	Formalize career conversations; reinforce team alignment and shared success
Development and Career	Support retention through growth	Plan career progression, align roles to skills and aspirations, leadership readiness discussions, skill expansion, cross-functional exposure, mentorship, update IDPs	IDP Template, Career Development Guide	Tie growth plans to team and business outcomes; celebrate achievements
Offboarding and Exit	Preserve culture and learn from transitions	Knowledge transfer, exit interview, retain institutional knowledge	Exit Checklist, Knowledge Capture Form	Maintain continuity, learnings, and respect for contributions



Lifecycle Flow



IDPs are initiated during the annual review and updated continuously in coaching sessions. Career conversations happen quarterly during coaching and check-ins, and formally during the annual review.





COACHING FOUNDATION

 **Coaching Philosophy**

Good coaching builds capability, supports growth, and strengthens relationships. For Filipino teams, it should be rooted in shared responsibility, respect, and harmony.

Coaching is not a once-a-quarter event. It's the ongoing conversation that keeps performance on track and keeps people engaged.

The managers who do this well do not wait for problems. They coach before problems appear.



The best coaching conversations are the ones employees don't realize are coaching. They just feel like someone is genuinely invested in their success.

Key Coaching Principles

Principle	What It Means	Why It Matters for Filipino Teams
Proactive and Continuous	Regular check-ins prevent escalation. Do not wait for quarterly reviews.	Filipino employees may not raise concerns voluntarily. Regular touchpoints create the opening.
Filipino-Aligned	Use supportive, respectful language. Encourage dialogue without confrontation.	Directness without warmth can feel harsh. Relationship-first communication gets better results.



Principle	What It Means	Why It Matters for Filipino Teams
Goal-Oriented	Link every coaching conversation to individual, team, and business objectives.	Employees stay more engaged when they see how their development connects to something meaningful.
Development-Focused	Identify skill gaps and growth opportunities in every conversation.	Filipino employees respond well to growth conversations. Promotions and development are deeply valued.
Workload and Wellbeing Aware	Recognize quiet dedication and prevent burnout.	Employees may silently overcommit out of respect. Checking capacity is a coaching responsibility.





What Coaching Is and What It Is Not

Coaching Is 	Coaching Is Not 
An ongoing conversation woven into check-ins	A formal session held only when something goes wrong
Two-way: the manager asks, listens, and responds	One-way: the manager tells the employee what to do
Forward-looking: focused on growth and next steps	Backward-looking: focused only on past mistakes
Relationship-based: built on trust and safety	Transactional: focused only on output and results
Proactive: addresses issues before they escalate	Reactive: only activated when performance drops





TOOL 01

Coaching Conversations Framework

Use this framework for every coaching conversation, whether it is a quick check-in or a structured session. The steps are the same. What changes is the depth of each one.



Step	What You Do	Filipino Cultural Note
Set the Tone	Begin with rapport or recognition of recent contributions. Spend a few minutes on the person before the topic.	Builds psychological safety and trust. Employees perform better in conversations that feel relational, not transactional.
Review Goals and Progress	Discuss achievements, challenges, and KPIs. Be specific. Reference actual examples, not general impressions.	Ask clarifying questions. Avoid blame. Filipino employees may interpret critical framing as personal.
Identify Development Needs	Explore skill gaps, career aspirations, and learning opportunities. Frame it as a partnership.	Encourage self-reflection. Employees who are invited to assess themselves are more honest and more committed to change.



Step	What You Do	Filipino Cultural Note
Problem-Solve Together	Co-create solutions for blockers or workload issues. Do not just hand them the answer.	Collaborative approach. Validate the employee's perspective before offering solutions. This preserves dignity and builds ownership.
Agree on an Action Plan	Define next steps, priorities, and measurable outcomes. Be specific about who does what by when.	Confirm understanding. Document accountability. Follow up in writing after the conversation.
Close on a Positive Note	Recognize effort and contributions. End the conversation on momentum, not uncertainty.	Reinforce motivation and shared responsibility. Employees should leave feeling supported, not evaluated.

Manager Tip

Use the GROW Coaching Template (Goal, Reality, Options, Way Forward) for all structured coaching sessions. It is available as a standalone tool in this toolkit.

Sample Coaching Conversation: Full Flow

Here is what a full coaching conversation looks like in practice. Adapt the language to your context and relationship.

Step 1: Set the Tone

Manager: *Hey, how are you doing? How was your week outside of work? (Listen. Share something yourself. This is not small talk. It is the foundation of trust.)*

Step 2: Review Goals and Progress

Manager: *Let's talk about where things stand on your goals this month. Walk me through how you are tracking on [specific goal].*

Manager: *What has been going well? What has been harder than expected?*

Step 3: Identify Development Needs

Manager: *Looking at what you just shared, where do you feel you want to grow? What skills would make this easier for you?*

Manager: *Is there anything you have been wanting to learn or try that we have not made space for yet?*

**Step 4: Problem-Solve Together**

Manager: *Based on what we discussed, what do you think the best next step is? I have some thoughts too, but I want to hear yours first.*

Step 5: Agree on an Action Plan

Manager: *Let's lock in the actions from today. You will handle [specific task] by [date]. I will support by [specific action]. I will send a summary of this after our call.*

Step 6: Close on a Positive Note

Manager: *I want to recognize the work you put into [specific contribution] this month. It made a real difference. I am looking forward to seeing where you take things next.*





TOOL 02

The GROW Coaching Model

GROW is the coaching framework used throughout this toolkit. It stands for Goal, Reality, Options, and Way Forward. It works for any coaching conversation, from a quick check-in to a structured development session.



Stage	The Question It Answers	Sample Questions to Ask
Goal	What does the employee want to achieve?	What are you trying to accomplish? What would a great outcome look like? How will you know when you have achieved it?
Reality	What is the current situation?	Where are things right now? What has already been tried? What is working and what is not? What obstacles are getting in the way?
Options	What could the employee do?	What options do you have? What else could you try? What would you do if you knew you could not fail? What have others done in this situation?
Way Forward	What will the employee actually do?	What is your next step? When will you do it? What support do you need? How confident are you on a scale of 1 to 5?



GROW in Practice: A Short Example

Goal

Manager: *What are you trying to work on this quarter?*

Employee: *I want to get better at managing client expectations during projects.*

Reality

Manager: *Where are things right now? What does that challenge look like in practice?*

Employee: *Sometimes I agree to timelines that are too tight, and then I have to go back and reset expectations. It feels uncomfortable.*

Options

Manager: *What are your options for handling that moment when the timeline feels tight?*

Employee: *I could ask for more time before committing. I could flag it immediately instead of hoping I can make it work.*

Way Forward

Manager: *What is your first step?*

Employee: *Before I commit to any timeline, I will check in with the team first.*

Manager: *Great. Let's check in on this in our next 1:1. I will also share some language you can use when resetting expectations with a client.*





GROW Coaching Session Template

Use this template to document your GROW coaching sessions. Keep it brief. The goal is to have a record, not to write an essay.

Employee Name and Date:

Goal: What does the employee want to achieve?

Reality: What is the current situation? What obstacles exist?

Options: What options did the employee identify?

Way Forward: What specific actions were agreed? By when?



Manager Follow-Up: What will you do to support the employee?

Next Check-In Date:

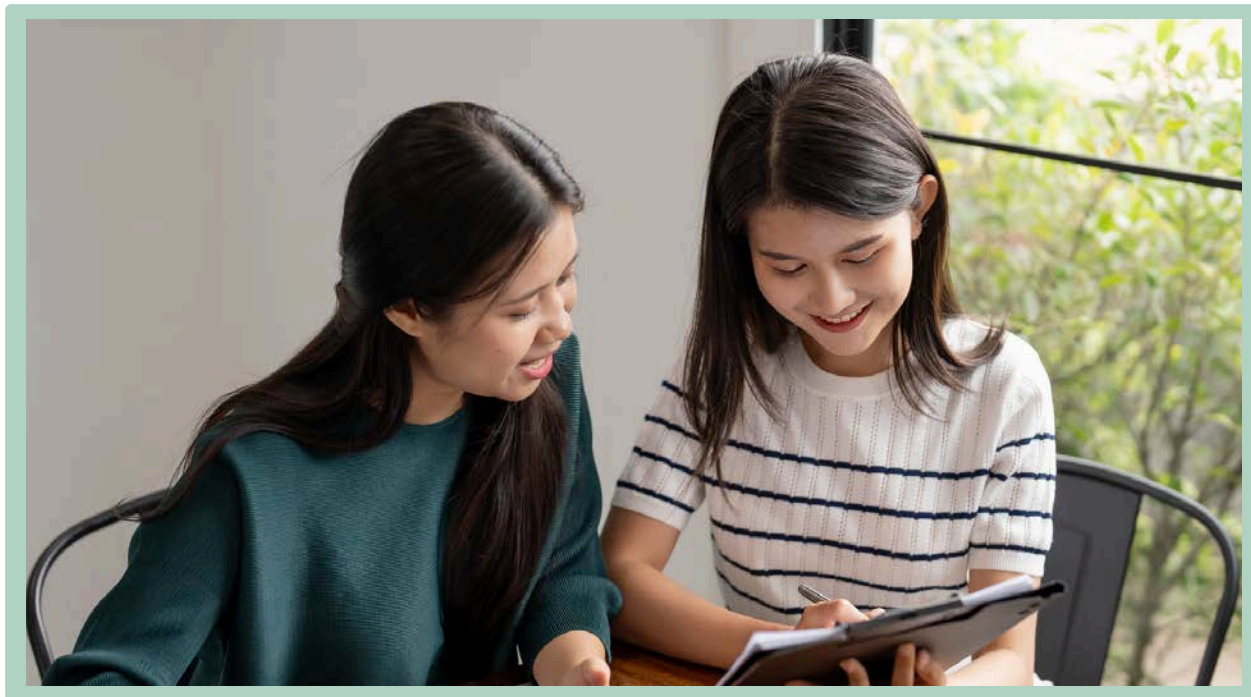




TOOL 03

Feedback Best Practices

Feedback is one of the most powerful tools a manager has. For Filipino teams, how you deliver feedback matters as much as what you say. Tone, timing, and context all shape whether feedback lands as support or as criticism.



Do's

Practice	Why It Matters	Example
Give feedback privately	Public correction damages dignity and trust in Filipino culture. Even gentle correction can feel humiliating if others are watching.	Schedule a quick call or message rather than raising concerns in a group chat or team meeting.
Use positive reinforcement	Starting with what is working makes employees more receptive to what needs to improve.	"I appreciate the effort you put into this. There are a couple of things I want to refine with you."
Be specific and behavior-focused	Vague feedback is not actionable. Personality-based feedback feels like a personal attack.	Instead of "You need to communicate better," say "In our last three client calls, the updates were sent after the deadline. Let's work on that."
Encourage dialogue	Feedback should be a conversation, not a verdict. Check for understanding and invite the employee's perspective.	"How does that land for you? What are your thoughts?"
Monitor workload	Overloaded employees cannot act on feedback. If capacity is the issue, address that first.	"Before we dig into this, how is your workload feeling right now?"



Watch Out For

Watch Out For	What It Looks Like	What to Do Instead
Blunt criticism	Delivering feedback without warmth or context. "This was wrong. Fix it."	Frame feedback with acknowledgment first. "I can see you worked hard on this. Let me share what I think we can strengthen."
Assuming silence is fine	Taking a quiet response or a quick yes as agreement or understanding.	Probe gently. "It seems like you might have some thoughts on this. I want to hear them."
Overloading employees	Giving too much feedback at once, or assigning new goals without checking existing capacity.	Prioritize. Pick the one or two things that will make the biggest difference and focus there.
Public correction	Raising performance concerns in front of peers or in group settings.	Always correct privately. Recognize publicly.
Feedback only when wrong	Only giving feedback when something goes badly, so feedback becomes associated with problems.	Give regular positive feedback. Make recognition a routine, not an exception.

Sample Manager Language

Opening with appreciation before raising a concern:

Manager: *I appreciate your effort on this. I noticed some areas we can improve together. Let's work on solutions.*

Checking workload before giving feedback:

Manager: *How are you managing your workload right now? I want to make sure any feedback I give is actually actionable for you.*

Opening dialogue after sharing feedback:

Manager: *Thank you for taking this on. What challenges are you facing? I want to understand your perspective before we agree on next steps.*

Probing gently when the employee goes quiet:

Manager: *I notice you went a bit quiet there. That usually means something is on your mind. What are you thinking?*

Closing a feedback conversation:

Manager: *I want to check: how did this conversation feel for you? Is there anything you want to add or push back on?*



TOOL 04

Performance Enablement

Performance enablement is about creating the conditions where people can do their best work. It goes beyond feedback and coaching. It is about making sure employees have the clarity, resources, recognition, and career support they need to perform consistently.



Your job as a manager is not just to evaluate performance. It is to enable it.

The 5 Enablement Levers

Lever	What It Means	How to Apply It
Clear Expectations	Employees understand their objectives, deliverables, and quality standards.	Set SMART + Impact goals. Confirm understanding in writing. Revisit expectations every quarter.
Skill Development	Employees have access to training, coaching, and stretch opportunities.	Include development goals in every IDP. Connect stretch assignments to career aspirations, not just business need.



Lever	What It Means	How to Apply It
Regular Check-ins	Managers monitor progress and adjust guidance early, before issues grow.	Use the 1:1 cadence from Module 3. Do not skip check-ins during busy periods. That is when they matter most.
Recognition and Motivation	Personal and professional achievements are celebrated consistently.	Recognize in public. Correct in private. Do not wait for big milestones. Small wins matter in Filipino teams.
Career Support	IDP discussions and career aspirations are woven into coaching, not saved for the annual review.	Ask about career goals in quarterly check-ins. Update IDPs regularly. Show employees a path forward.

Linking Enablement to the Coaching Cycle

Performance enablement works best when it is connected to a consistent coaching rhythm. Use this as your reference for when to activate each lever.

Coaching Moment	Enablement Focus
Monthly 1:1	Workload check, recognition, any blockers to clear.
Quarterly check-in	Goal progress, skill development update, career conversation.
Mid-year review	Performance against goals, IDP review, stretch opportunity discussion.
Annual review	Full-year performance, IDP planning, salary and career progression.
Anytime a concern surfaces	Address it immediately. Do not wait for the next scheduled check-in.

Manager Tip

Link coaching to quarterly reviews, annual reviews, and development conversations to maintain a continuous improvement loop. Coaching that exists in isolation does not stick.

CULTURAL GUIDE

Manager Tips for Filipino Teams

These are not rules. They are reminders. The most effective managers of Filipino offshore teams apply these consistently, not just when something goes wrong.



Tip	Why It Matters	What It Looks Like in Practice
Balance empathy with accountability	Filipino employees respond to managers who care. But care without accountability does not drive performance.	Acknowledge the effort. Then be clear about the expectation. Both things can be true at once.
Celebrate wins frequently, personal and professional	Recognition is a primary engagement driver in Filipino culture. Employees remember being seen.	Shout out a birthday in the team call. Acknowledge a work anniversary in writing. Celebrate a project close-out, even a small one.
Encourage transparency in workloads and questions	Silent overcommitment is one of the most common issues in Filipino offshore teams. Employees say yes, then struggle alone.	Ask about workload directly and regularly. Make it safe to say no or to ask for help.



Tip	Why It Matters	What It Looks Like in Practice
Apply Filipino principles in every interaction	Kapwa, malasakit, and pakikisama are not background culture. They are active leadership tools.	Connection before task. Relationship before feedback. Shared identity before individual accountability.
Monitor workload and prevent silent burnout	Burnout in Filipino employees often goes unannounced. By the time it shows up, the employee is already disengaged or planning to leave.	Watch for quieter participation, longer hours, and shorter responses. Ask before it becomes a problem.
Integrate career conversations into coaching	Filipino employees value career progression deeply. Saving this only for the annual review signals that you are not invested in their future.	Ask about career goals in monthly 1:1s. Reference the IDP in quarterly check-ins. Mention it before it becomes urgent.





TOOL 05

Coaching Session Tracker

Use this tracker to maintain a running record of coaching conversations for each employee. Consistent documentation supports performance reviews, IDP updates, and Confirmation of Permanent Employment decisions.

Why Document?

Undocumented coaching is difficult to reference during performance reviews and impossible to defend in formal processes. A brief record after each session is all you need.





Individual Coaching Log

Employee Name: _____

Role: _____

Date	Session Type	Key Topics Discussed	Actions Agreed	Follow-Up Completed
	1:1 Check-in			
	Goal Review			
	GROW Session			
	Feedback			
	Development			
	1:1 Check-in			
	Quarterly Review			
	1:1 Check-in			
	Goal Review			
	GROW Session			
	Annual Review			
	Development			

Coaching Quality Self-Check

Run through this after every coaching conversation. It takes less than two minutes and keeps your coaching sharp over time.

- Did I start with rapport before moving to the topic?
- Did I ask more than I told?
- Did I check workload and capacity?
- Did I invite the employee to identify their own solutions?
- Did I close with specific, agreed actions?
- Did I send a written follow-up after the conversation?
- Did I recognize effort or contribution at some point?
- Did I document the session?



QUICK REFERENCE

 **Module 02 at a Glance**

Use this as a quick reference for the tools and frameworks in this module.

Tool	When to Use
Lifecycle Overview Table	Any time you need to orient yourself to what stage an employee is at and what your priorities should be.
Coaching Conversations Framework	Every coaching conversation. Use the six-step flow as your default structure.
GROW Coaching Model	Structured coaching sessions focused on a specific development goal or challenge.
GROW Session Template	After every GROW session. Document goals, reality, options, and way forward.
Feedback Best Practices	Before giving feedback. Use as a prep checklist.
Sample Manager Language	When you need the right words. Adapt to your relationship and context.
Performance Enablement Levers	When planning how to support an employee's performance over the coming quarter.
Coaching Session Tracker	After every coaching conversation. Keep a running log for each employee.
Coaching Quality Self-Check	After every coaching conversation. Quick self-assessment to stay sharp.

Principle	The One-Line Reminder
Kapwa	We are in this together. Connection before task.
Malasakit	Genuine care builds the trust that makes everything else work.
Pakikisama	Team harmony matters. Build relationships, not just accountability.
Hiya	Employees avoid embarrassment. Correct privately. Always.

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MANAGER'S TOOLKIT | MODULE 03

Onboarding and the **First 6 Months**

Building Clarity, Confidence, and Trust

Why and how the first six months shape the entire leadership relationship.



MODULE OVERVIEW



What's In This Module

This module guides managers through the first six months of an employee's journey. It covers every tool, conversation, template, and cultural insight you need to onboard with confidence and build a foundation for long-term performance.

Section	What It Covers
<u>Why This Matters</u>	The cultural and operational case for getting onboarding right.
<u>Relationship Journey and Filipino Culture</u>	How to build trust, create safety, and apply malasakit in practice.
<u>The 1-6 Month Journey at a Glance</u>	The four-phase framework: Clarity, Alignment, Ownership, Confirmation.
<u>1. Onboarding Checklist (Day 0-30)</u>	What to cover in the first month, with conversation prompts.
<u>2. Vision Setting</u>	How to connect the employee's role to business impact.
<u>3. Culture and Values Alignment</u>	Making behavioral expectations explicit from Day 1.
<u>4. Goal Setting (SMART + Impact)</u>	Templates, capacity checks, and KPI planning.
<u>5. Check-In Guide (1-6 Months)</u>	Cadence, focus areas, and prompts for each phase.
<u>6. Organization Points of Contact</u>	Who to go to for what, and how to set escalation expectations.
<u>7. Performance Discussion Guide</u>	Step-by-step conversation framework for structured feedback.
<u>8. 30/60/90/180-Day Evaluation</u>	How to track progress and confirm permanent employment fairly.
<u>180-Day Leadership Checkpoint</u>	A self-check for managers before the confirmation decision.



Why This Matters

The first six months determine whether employees stay quiet or contribute confidently.

Managers who set clear expectations, invite dialogue through regular check-ins, and provide early feedback enable Filipino employees to ask questions, share insights, and perform confidently, rather than managing uncertainty in silence.

When managers get this stage right, concerns surface earlier, misalignment is corrected sooner, and teams operate with fewer surprises and less rework.

What Employees Are Learning in These First 6 Months

The first six months shape how employees perform long-term. This stage is about more than what people deliver early on. Employees are learning:

- **How safe it is to ask questions.**
- **How expectations are clarified.**
- **How feedback is handled.**
- **Whether speaking up leads to support or consequences.**



Understanding the Filipino Cultural Context

For Filipino employees, this phase is especially important. Many are raised to listen to and follow elders and authority figures. Questioning or challenging someone in a leadership position can feel disrespectful.

Over time, this cultural conditioning reinforces harmony, politeness, and indirect communication.

As a result:

- Concerns may remain unspoken.
- Questions may be delayed out of respect for authority.
- "Yes" may reflect willingness to try, not full clarity.
- Silence may signal hesitation rather than alignment or agreement.

*This **does not** indicate disengagement or lack of ownership. It reflects deeply ingrained social norms rooted in kapwa, the Filipino value of shared humanity and responsibility to preserve relationships.*





Managers play a critical role in reshaping this dynamic at work.

By explicitly inviting dialogue, checking understanding, modeling openness, and responding calmly, managers gradually create psychological safety.

This shift takes time. Employees may have spent years being taught to avoid challenging authority.

Consistent leadership makes a measurable difference.

When Safety Is Established

- Concerns are raised earlier.
- Misunderstandings are corrected sooner.
- Performance risks are addressed before they escalate.
- Delivery becomes more predictable.



Relationship Journey and Application of Filipino Culture

Core Principle: Building relationships based on trust creates a safe space. That is *the* foundation for Filipino employees to speak up, ask questions, and take initiative.

Manager Tip

Personal connection is not a nice-to-have. In Filipino teams, it directly supports confidence and performance.

For Filipino Teams

Dynamic

What It Means in Practice

Personal connection supports professional confidence

Employees who feel seen as people (*not just workers*) perform better and speak up earlier.

Safety enables honesty

When employees trust their manager, they raise concerns instead of absorbing them silently.

Structure reduces fear of mistakes

Clear expectations and normalized mistakes during learning remove the anxiety of getting things wrong.





How to Build Trust and Create a Safe Space

Get to Know Employees on a Personal Level

Spend the first few minutes of every check-in on life outside work. Ask about their weekend, their family, what they're looking forward to.

This signals *malasakit*, a Filipino term embodying deep compassion and sincere concern. It makes employees feel seen as people, not just employees.



What is Malasakit?

Malasakit (*mah-lah-SAH-kit*) is a unique Filipino value that has no direct English translation. It means caring about someone *so deeply* that you treat their problems as your own. Not just feeling sorry for them. Actually doing something about it.

When managers lead with malasakit, Filipino employees feel seen, safe, and supported enough to speak up and give their best.

Explicitly Invite Questions

Do **not** assume employees will ask if something is unclear. They may not, out of respect for your time or authority. Make it **explicit** and make it **routine**.

Sample language you can use:

Manager: *I want to make sure we are fully aligned. What questions do you have so far?*

Manager: *There are no wrong questions here. What feels unclear?*

Manager: *What questions are you hesitant to ask? I want to hear those especially.*



How to Build Trust and Create a Safe Space

Normalize Mistakes During Learning



Filipino employees may be especially reluctant to make mistakes in front of authority. Set the tone early that mistakes during the learning period are expected and useful.

Manager: *In your first 30 days, your job is to learn. Making mistakes is part of that. What matters is that we catch them early and figure it out together.*

Follow Verbal Discussions With Written Summaries

After any key conversation, send a brief written summary. This removes the risk of misinterpretation and gives employees a reference point they can return to without having to ask again.

Example follow-up message after a check-in:

Manager: *Great chat earlier. Just summarizing what we covered: [key points]. Your priorities for this week are [tasks]. Let me know if anything feels unclear.*



How to Build Trust and Create a Safe Space

Ask Employees to Explain Their Understanding Back

Do not just ask if something is clear. That will almost always get a yes. Instead, ask them to explain it back to you.

Manager: *Can you walk me through how you are thinking about this task? I want to make sure we are on the same page.*

Manager: *What are your next steps after our conversation today?*

Manager Outcomes When Done Well

When trust and clarity are established early:

- Fewer late escalations and surprises.
- Reduced miscommunication and rework.
- Issues addressed closer to the root cause.

When trust is present, managers spend less time firefighting and more time leading.



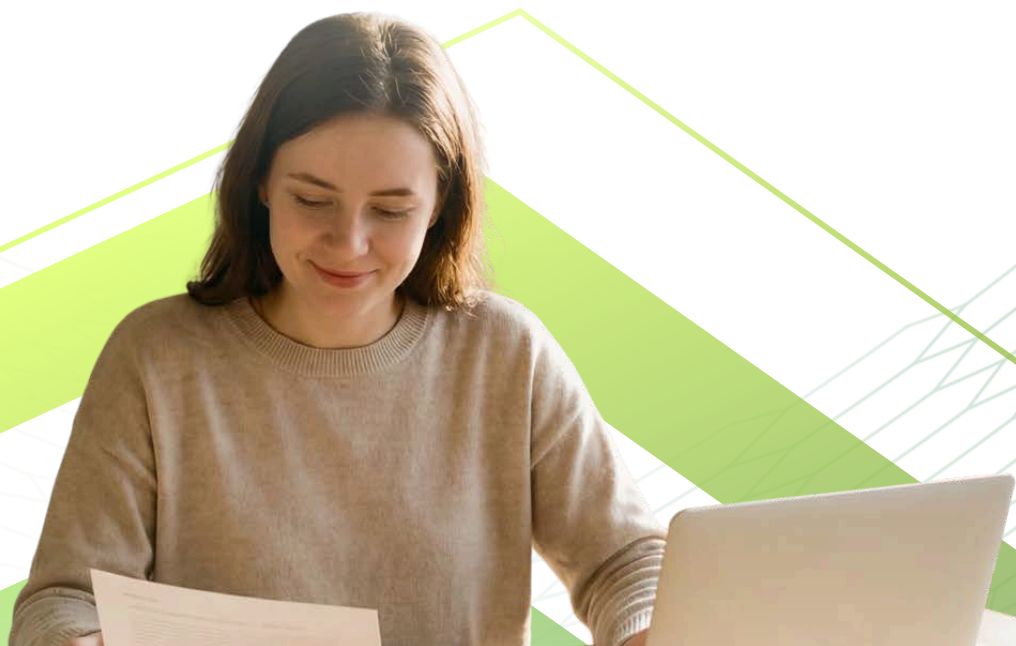
The 1-6 Month Manager Journey at a Glance



Timeline	Manager Priority	What It Achieves
Month 1: Clarity	Set expectations, explain the role, establish communication rhythms	Reduces uncertainty and builds early confidence
Months 2-3: Alignment	Set SMART + Impact goals, monitor progress, provide structured feedback	Ensures alignment on expectations and performance standards
Months 4-5: Ownership	Increase independence, assess readiness, reinforce accountability	Builds confidence and operational reliability
Month 6: Confirmation of Employment	Conduct formal performance review and confirm permanent employment	Ensures fair, evidence-based employment confirmation decisions

Manager Tip

When clarity and trust are built early, employees speak up sooner, alignment happens faster, and performance becomes more predictable.





Manager-Guided Operational Cycle: Day 0 to Month 6

Timeframe	Manager Focus	What Must Happen	Key Tools
Month 0-1	Foundation and Safety	Onboarding walkthrough, vision and role context, culture and values alignment, weekly check-ins	Onboarding Checklist, Vision Script, Culture and Core Values Guide
Month 2-3	Alignment and Confidence	Goal setting (SMART + Impact), bi-weekly check-ins, 30/60-day performance feedback	Goal Setting Template, KPI Guide, Performance Discussion Guide
Month 4-5	Ownership and Growth	Monthly check-ins, early readiness assessment, permanent employment trajectory review	Check-In Guide, Performance Evaluation Form
Month 6	Confirmation of Permanent Employment	Performance evaluation, confirmation discussion, clear outcome and next steps	Performance Evaluation Form, Confirmation of Permanent Employment Notice

In the Philippines, employees undergo a probationary period of up to six months. At the end of this period, managers conduct a formal review to determine whether employment will be confirmed on a permanent basis. This is commonly referred to locally as "regularization."

In this toolkit, we use the term Confirmation of Permanent Employment for clarity and global consistency.



TOOL 01

Onboarding Checklist for Managers

Day 0-30 | Manager Focus: Create clarity, predictability, and early trust.



Silence in the first month often signals hesitation. Filipino employees may avoid asking questions to maintain harmony or avoid seeming like a burden to their manager.

Employees are silently asking: "How supported will I be here?"

Recommended Check-In Cadence

Period	Format	Purpose
Month 1	Weekly 1:1s (30-45 minutes)	Clarity, reassurance, early course-correction
Months 2-3	Bi-weekly 1:1s	Performance alignment, confidence-building
Months 4-6	Monthly 1:1s	Growth, ownership, permanent employment readiness

Manager Tip

Frequent check-ins early reduce rework and anxiety later. They're an efficiency tool, not a time cost.



What to Cover in the First 30 Days

- Role scope and priorities.
- Tools, workflows, and expectations.
- Communication norms and response times.
- Core values and behavioral expectations.
- What success looks like in the first 3-6 months.
- Key performance targets and how they will be evaluated.
- How Confirmation of Permanent Employment works.

Manager Tip

Clarity in Month 1 prevents confusion in Month 4.





Onboarding Checklist: Manager Guide (Day 0-30)

Use this checklist in your first 30 days with a new employee. Tick each item off as you complete it.

A. Role and Expectations

- Review role scope and key responsibilities.
- Clarify 90-day priorities.
- Explain how success will be measured (targets and behaviors).
- Share core values and what they look like in practice.
- Confirm the employee understands their key deliverables for Month 1.

B. Communication and Workflow

- Review tools and workflows.
- Define response time expectations.
- Clarify escalation paths.
- Introduce Organization Points of Contact.
- Confirm preferred communication channels (email, Slack, etc.).

C. Relationship and Safety

- Schedule weekly 1:1s for Month 1.
- Explicitly invite questions in your first conversation.
- Share feedback norms (private vs. public recognition and correction).
- Normalize mistakes during the learning period.
- Send a written summary after your first 1:1.

Starter Conversation Prompts

Use these in your first few check-ins to open dialogue and build psychological safety.

- 1. Check for clarity:** *"What feels clear so far? What feels unclear?"*
- 2. Surface hidden questions:** *"What questions are you hesitant to ask? I really want to hear those."*
- 3. Build confidence:** *"What would help you feel more confident this month?"*
- 4. Set relationship norms:** *"Is there anything about how we work together that you would like to understand better?"*
- 5. Get a temperature read:** *"On a scale of 1-5, how clear do you feel about your priorities right now? What would move that number up?"*



Reminder

Silence does not equal alignment. Follow up in writing after every key discussion.



TOOL 02

Vision Setting

Team and Business Overview | Vision-Setting Script

Manager focus: Help employees understand how their work fits into the bigger picture.

Manager Tip

You don't need a polished deck. A clear explanation of why the role exists and what success looks like is enough to build ownership.



Without context, Filipino employees may focus on task completion over impact, and hesitate to suggest improvements.

Why Vision Setting Matters

Filipino employees show higher commitment when they see how their role contributes to team success, client outcomes, and business impact. Vision setting reduces task-only thinking and increases ownership.

Without Vision Setting	With Vision Setting
Employees focus on completing tasks	Employees understand the impact of their work
Improvements are rarely suggested	Employees proactively flag better ways of doing things
Employees hesitate to take initiative	Employees feel empowered to act
Work feels transactional	Work feels meaningful and connected to a larger purpose

Vision Setting Script

Use this script in your first week with a new employee. Adapt it to your team and business context.

Step 1: The Big Picture

Manager: *Our team is responsible for [describe the team's core function and output]. We exist because [explain the business reason the team exists].*

Step 2: Why It Matters

Manager: *Our work impacts the business and our clients by [describe the direct business or client impact]. When we do this well, [describe what happens as a result].*

Step 3: Your Role in That Impact

Manager: *Your role contributes by [describe how this specific role creates value]. The work you do makes a difference because [connect their tasks to the bigger outcome].*

Step 4: What Success Looks Like in the First 6 Months

Manager: *In the first six months, strong performance will look like [describe specific, observable behaviors and results]. You will know you are on track when [describe indicators of success].*

Step 5: What I Expect From You

Manager: *Here is what I expect from you as we work together: proactive and open communication, early flagging of concerns before they grow, willingness to ask clarifying questions, and active participation in team discussions. Your voice matters here.*

After the Vision Conversation

Once you have shared the vision, check for genuine understanding.

Manager: *How does your role connect to what we just discussed? Can you walk me through it in your own words?*

Manager: *What part of what I shared resonates most with you?*

Manager: *Is there anything you want to understand better about the team or the business?*



TOOL 03

Culture and Values Alignment

Behavioral Expectations | Manager Focus: Make how we work together explicit.

Manager Tip

Clearly naming behavioral expectations creates safety. It doesn't reduce respect for leadership.



If expectations around speaking up or challenging ideas are not stated, employees will default to silence to preserve harmony.

Sample Manager Language for Culture Setting

Make questions safe: *On this team, asking questions and raising concerns early is encouraged. It helps us prevent issues later. There is no such thing as a bad question here.*

Make disagreement safe: *If you disagree with a direction, I want to hear it. You can come to me directly, or raise it in our 1:1. The way we disagree matters though. Let's be direct, respectful, and focused on what is best for the team and the client.*

Set feedback as two-way: *Feedback goes both ways here. I will give you feedback regularly and privately unless it is a recognition moment, in which case I will share it with the team. I also want feedback from you on how I can support you better.*



A. Meeting Participation

Expectation	How We Do It on This Team
Level of participation in meetings	
How to raise a concern in a meeting	
How to disagree respectfully	
What happens if you are not sure	

B. Feedback Norms

Norm	How We Do It on This Team
How recognition is given (public vs. private)	
How correction is given (public vs. private)	
How often feedback is shared	
How to give feedback to your manager	

C. Ownership and Escalation

Situation	What to Do
Decisions you can make independently	
Situations that require manager input	
Situations that require escalation	
Who to contact when your manager is unavailable	

TOOL 04

Goal Setting (SMART + Impact)

Manager Focus: Translate expectations into clear, achievable goals.

Why SMART + Impact?

Most goal-setting frameworks stop at SMART. That tells employees what to do. The Impact layer tells them why it matters.

When employees understand both, they take more ownership, make better decisions, and stay more engaged when things get hard.

Manager Tip

Always pair goal-setting with a capacity check to prevent silent burnout.

A quick yes may reflect politeness or effort, not true capacity. Filipino employees may agree to unclear or unrealistic goals out of respect.





The SMART + Impact Framework

Component	The Question It Answers	Example
Specific	What exactly is expected?	Complete client onboarding documentation for all new accounts within 5 business days of contract signing.
Measurable	How will success be tracked?	100% of onboarding docs submitted on time, tracked in the project management tool.
Achievable	Is this realistic given workload and resources?	Confirmed with employee that current workload allows for this target.
Relevant	Does this align with team or business priorities?	Directly supports our client satisfaction and retention targets.
Time-bound	When must this be completed?	Ongoing target, reviewed quarterly.
Impact	Why does this goal matter?	Late onboarding documentation delays client go-live and damages trust. Getting this right reduces escalations and strengthens the client relationship.





SMART + Impact Goal Template

Use this template for each goal. Complete all fields before finalizing with the employee.

Goal Title

Specific Outcome (What exactly needs to happen?):

Success Metric (How will we measure it?):

Timeline (By when?):

Business / Client Impact (Why this matters):

Dependencies / Support Needed:



Capacity and Alignment Check

Complete this before finalizing any goal. Because yes may reflect politeness rather than true capacity, always have this conversation explicitly.

Current workload considerations:

Competing priorities:

Employee confidence level (1-5, where 5 = fully confident):

What support is needed to succeed?

Reminder

Confirm goals verbally during discussion and follow up in writing to prevent misalignment.

Ask: "Can you walk me through how you plan to approach this goal?"



Individual KPI Planning Sheet

Use this to plan and track KPIs across the team. Limit to key priorities. Overloading KPI lists defeats the purpose.

KPI	Target	Measurement	Frequency	Weight	Business Impact

Goal-Setting Review Questions

Before wrapping up any goal-setting conversation, run through these:

- Are these goals realistic within the current workload?
- Is success clearly defined so both of you would agree on whether it was met?
- Does the employee understand how each goal connects to business outcomes?
- Has the employee confirmed their capacity to take this on?
- Have you followed up in writing?

Why This Template Matters

Clear, impact-linked goals:

- Reduce rework and missed expectations.
- Prevent silent burnout.
- Improve accountability.
- Enable fair and defensible Confirmation of Permanent Employment decisions.
- Strengthen long-term performance alignment.





TOOL 05

1-6 Month Check-In Guide

Manager Focus: Normalize feedback and reduce uncertainty.

Month 1: Clarity and Confidence

The goal of Month 1 check-ins is to reduce uncertainty and build early trust. Keep these conversations warm, specific, and forward-looking.

Check-in Prompts

Manager: What feels clear so far?

Manager: What feels overwhelming or uncertain?

Manager: What support would help you most this week?

Manager: Is there anything you have been hesitant to ask?

Manager: How are you finding the team and the working environment so far?

What to Watch For

- Vague or brief answers. These may signal the employee is holding back.
- Consistently positive responses with no concerns raised. Probe gently.
- Signs of overload: longer hours, quieter participation, delayed responses.





Months 2-3: Alignment

The goal of Months 2-3 check-ins is to ensure goals are clear, performance is on track, and any early blockers are surfaced before they grow.

Check-in Prompts

Manager: How is progress toward your goals this month?

Manager: Are there any blockers I can help you remove?

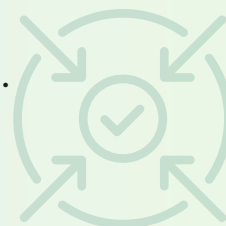
Manager: Is your current workload sustainable? What is feeling heavy?

Manager: Is anything unclear about expectations or priorities?

Manager: What has gone well that we should keep doing?

What to Watch For

- Goals that are consistently described as on track but with no specifics. Ask for evidence.
- Workload concerns that only come out when asked directly.
- Hesitation before answering, which may signal an unspoken concern.





Months 4-6: Ownership

The goal of Months 4-6 check-ins is to build independence, assess readiness, and prepare for the Confirmation of Permanent Employment discussion.

Check-in Prompts

Manager: What can you handle fully independently now?

Manager: Where do you still want more guidance or support?

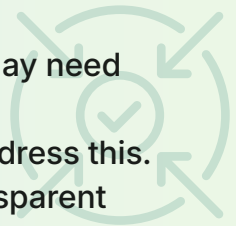
Manager: Where do you want more challenges or complexity?

Manager: How are you feeling about your growth here over the past few months?

Manager: Is there anything about your role or the team that you would like to change or improve?

What to Watch For

- Employees who still hesitate to make decisions independently. They may need more explicit permission.
- Employees who are performing well but have not been recognized. Address this.
- Concerns about the permanent employment review surfacing. Be transparent about the process.





Check-In Tracker

Use this to document key takeaways from each check-in. Keep it brief but consistent.

Date	Check-In Focus	Key Takeaways	Actions Agreed	Follow-Up Done
	Month 1			
	Month 1			
	Month 2			
	Month 2			
	Month 3			
	Month 4			
	Month 5			
	Month 6			





TOOL 06

Organization Points of Contact

Manager Focus: Reduce hesitation around escalation and support.

Manager Tip

Explicitly encourage appropriate escalation. It prevents small issues from becoming larger problems.



Filipino employees may hesitate to reach out beyond their manager due to respect for hierarchy. They need explicit permission and clear direction on who to contact.

Why This Matters

Clear points of contact reduce delays in resolving issues and prevent small problems from becoming large ones. When employees know exactly who to reach out to, and feel safe doing so, they stop absorbing problems in silence.

Organization Points of Contact Guide

Fill in this template and share it with every new employee in their first week. Update it whenever contacts change.



Concern Type	Contact Person	Channel	Expected Response Time
HR questions	[HR POC Name]	Email	1-4 working days
Payroll and benefits	[Payroll POC Name]	Email	1-4 working days
IT concerns	[IT POC Name]	Email	1-2 working days
Escalations	[Client Identified POC]	Email / Collaboration Platform	1 working day
Direct manager	[Your Name]	[Your preferred channel]	[Your response time]
Backup when manager unavailable	[Backup Name]	[Channel]	[Response time]

SLA may vary depending on the nature of the issue raised.

How to Introduce the POC Guide

Manager: *I want to make sure you always know who to reach out to, and that you feel comfortable doing so. Here is a guide of who handles what. You should never feel like you have to figure something out alone or wait for me if someone else can help you faster.*

Manager: *If you are ever unsure who to contact, just message me and I will point you in the right direction.*





TOOL 07

Performance Discussion Guide

Manager Focus: Deliver feedback that is clear, respectful, and constructive.

Manager Tip

Open performance conversations by framing them as alignment and support, not judgment.



Tone and delivery matter as much as content. Public correction or abrupt feedback can damage trust quickly and take a long time to repair.

This guide should be used alongside the official Performance Evaluation Form. It is designed to help managers run structured, clear, and culturally aware performance conversations at any point in the 1-6 month journey.

Step 1: Pre-Discussion Preparation

Before the conversation, review:

- Agreed goals and KPIs.
- Performance metrics and outputs.
- Behavioral competencies (how the work was done, not just what was delivered).
- Prior feedback given.
- Development commitments.
- Any documented performance concerns.

Ensure your rating is:

- Based on patterns, not isolated incidents.
- Consistent with the official 1-5 definitions.
- Defensible if reviewed later.



Step 2: Open the Conversation

Start personal. Build the relationship before discussing performance. This is a two-way conversation, so be ready to share something yourself.

Manager: How are you? How was your weekend?
Manager: Why was that significant to you?
(Share something personal about your own week as well. This models openness.)

Step 3: Set Context

Manager: This discussion is about alignment and growth. I want this to be a two-way conversation. I will share observations based on what I have seen, and I want to hear your perspective too. Feedback is based on what I have observed, and questions are encouraged throughout.

Step 4: Review Goals and KPIs (Performance: What)

Discuss goal by goal. For each goal:

- Restate the agreed target.
- Review actual results.
- Assign a rating using the 1-5 scale.
- Explain the evidence behind the rating.

Rating	Description	What It Looks Like
5: Exceptional	Far exceeds expectations	Exceeds all goals consistently; role model behavior; often helps others reach their goals too.
4: Exceeds	Often exceeds expectations	Consistently high-quality output; takes initiative; goes beyond what is asked.
3: Meets	Consistently meets expectations	Completes all assigned tasks reliably; meets deadlines; delivers quality work.
2: Needs Improvement	Below expectations	Requires frequent coaching or follow-up; some targets missed; improvement plan may be needed.
1: Unsatisfactory	Fails to meet expectations	Goal achievement is minimal; frequent errors or missed deadlines; formal intervention required.

Manager: How do you assess your own performance on this goal? Walk me through how you are thinking about it.



Step 5: Review Behavioral Competencies (Performance: How)

Use the same 1-5 scale to rate each competency area:

- Communication.
- Collaboration.
- Initiative.
- Accountability.
- Alignment with team values.

For each area, discuss: specific examples, positive impact, improvement areas, and patterns observed. Focus on behavior and observable outcomes. Avoid personality-based statements.

Step 6: Capacity and Sustainability Check

This step is especially important for Filipino teams. Employees may absorb overload in silence rather than raise concerns.

- Manager:** *Were there moments where the workload felt too heavy?*
- Manager:** *Did you hesitate to raise concerns at any point? What held you back?*
- Manager:** *Is anything currently unclear about expectations or priorities?*

This prevents: silent burnout, overcommitment, and late escalation.

Step 7: Development and Growth

Before finalizing ratings, shift the conversation forward. Co-create next steps with the employee.

Rating Range	Development Focus
Ratings 4-5	Stretch opportunities and leadership exposure. What bigger challenges are they ready for?
Rating 3	Skill refinement and consistency. What would move them from reliable to exceptional?
Ratings 1-2	Clear improvement plan with timeline. What specific behaviors need to change, and by when?

Manager: *Based on what we discussed, here are the areas we can strengthen and build on. I want us to work on this together. What support do you need from me?*

Step 8: Summarize Overall Rating

- Provide the overall rating and clear rationale.
- State expectations moving forward.
- Confirm alignment with the documented evaluation form.

Step 9: Close With Clarity

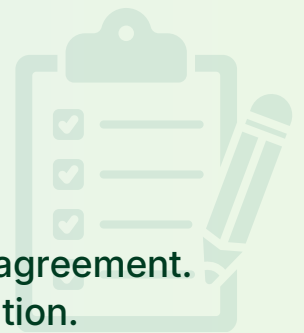
Manager: *How does this feedback land for you?*

Manager: *What questions do you have?*

Manager: *Let me summarize what we agreed on today and I will send this to you in writing after our conversation.*

Manager Reminders (Kapwa-Informed)

- Deliver feedback calmly and respectfully.
- Correct privately. Recognize publicly.
- Be direct, but not abrupt.
- Invite questions explicitly. Do not assume silence means agreement.
- Pause and check understanding throughout the conversation.





TOOL 08

30 / 60 / 90 / 180-Day Evaluation

Confirmation of Permanent Employment | Manager Focus: Close the onboarding loop with documented performance evidence.

Manager Tip

There should be no surprises at the 180-day stage. The final outcome should reflect patterns already discussed, documented, and aligned throughout the first six months.

The six-month review marks the formal decision point for confirming permanent employment. This decision should reflect a progression of documented conversations held at 30, 60, and 90 days, not a single isolated assessment.

Individual KPI Planning Sheet

Use the Performance Evaluation Form at each checkpoint to:

- Assess goals and KPIs using the 1-5 rating scale.
- Evaluate behavioral competencies (how work is done, not just what is delivered).
- Document observable evidence. Ratings must align with specific examples.
- Identify performance trends: improving, stable, or declining.
- Clarify expectations and next steps.





Tracking Performance Across Checkpoints

Checkpoint	Focus	Key Question
30 Days	Onboarding trajectory and clarity. Ratings may reflect the learning curve and adjustment period.	Is the employee building the right foundations?
60 Days	Alignment and capability growth. Identify early risk signals or skill gaps.	Is the employee on track with expectations?
90 Days	Stability and increasing independence. Performance should show growing consistency.	Is the employee developing the right behaviors?
180 Days	Sustained performance and behavioral alignment. Ratings must reflect consistent results and readiness for employment confirmation.	Is this employee ready for permanent employment?

A 180-day confirmation decision should not be based on potential alone. It should be based on demonstrated, repeatable performance.

Confirmation of Permanent Employment Decision

At the end of the first 6 months, determine which of the following applies. The decision must align with documented ratings, prior feedback discussions, performance consistency, and behavioral alignment with core values.





Decision Options

- Confirm Permanent Employment
- Extend Evaluation Period (if legally permitted)
- Do Not Confirm Employment (Unsuccessful Probationary)

Evidence-Based Rationale (required for all decisions):

Business Impact of Doing This Well

When Done Well	The Result
Evaluations are consistent and documented	Early risks are addressed before escalation.
Managers reduce reactive performance issues	Decisions are defensible and fair.
Employee trust in leadership increases	Long-term performance becomes more predictable.
Retention improves	Teams are more stable and capable over time.





MANAGER SELF-CHECK

180-Day Leadership Checkpoint

Before Month 6, ask yourself these questions honestly. This is not about being a perfect manager. It is about being a consistent one.

Safety and Dialogue

- Have I made it safe to ask questions from Day 1?
- Have I explicitly invited questions, or just assumed employees would ask?
- Have I responded calmly when concerns were raised, so employees will raise them again?

Clarity and Expectations

- Have I clarified expectations, or assumed they were understood?
- Have I followed up in writing after key conversations?
- Have I checked for genuine understanding, not just a yes?

Capacity and Wellbeing

- Have I checked capacity, not just accepted yes when asking about workload?
- Have I watched for signs of silent burnout or overcommitment?
- Have I celebrated wins, both big and small?

Documentation

- Have I documented feedback conversations consistently throughout the six months?
- Is the 180-day decision based on patterns of evidence, not a single assessment?
- Can I defend my rating if it is reviewed?

This stage determines whether your team becomes quiet and compliant, or confident, proactive, and invested. The difference is in how you led the first six months.



Outcome of This Stage

When managers follow this guided cycle consistently:

- Faster role stabilization and productivity.
- Earlier identification of risks, reducing escalation.
- Fewer misunderstandings and less rework.
- Increased employee initiative and ownership.
- Clear, defensible permanent employment decisions.
- Stronger retention and more predictable team performance.

Psychological safety is not just cultural. It directly improves delivery, efficiency, and scalability. It is an optimization strategy, not a soft initiative.





QUICK REFERENCE

Module 03 at a Glance

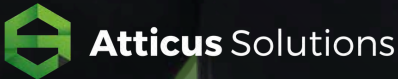
Use this summary page as a quick reference throughout the first six months.

Month	Priority	Key Actions	Tools to Use
Month 1	Clarity and Safety	Onboarding checklist, vision setting, culture and values alignment, weekly check-ins, written follow-ups	Onboarding Checklist, Vision Script, Culture and Values Template, POC Guide
Month 2	Alignment	Set SMART + Impact goals, bi-weekly check-ins, 30-day performance feedback	Goal Setting Template, KPI Sheet, Performance Discussion Guide
Month 3	Alignment	60-day performance feedback, goal review, capacity check	Performance Evaluation Form, Check-In Guide
Month 4	Ownership	Monthly check-ins, increase independence, early readiness assessment	Check-In Guide, Performance Evaluation Form
Month 5	Ownership	Monthly check-ins, development conversations, permanent employment trajectory review	Check-In Guide, Performance Evaluation Form
Month 6	Confirmation	180-day performance evaluation, confirmation of permanent employment discussion, clear outcome and written summary	Performance Evaluation Form, Confirmation Notice



Documents and Tools Referenced in This Module

Tool	When to Use
Onboarding Checklist (Day 0-30)	First week with every new employee.
Vision-Setting Script	First week. Explain the big picture and the role's impact.
Team Culture and Values Template	First week. Make behavioral expectations explicit.
SMART + Impact Goal Template	Months 2-3 and ongoing for quarterly goal alignment.
Individual KPI Planning Sheet	Months 2-3. Set and track key performance indicators.
1-6 Month Check-In Guide	Every check-in throughout the six-month period.
Check-In Tracker	After every check-in. Document key takeaways and actions.
Organization POC Guide	First week. Share with every new employee.
Performance Discussion Guide	30, 60, 90, and 180-day performance conversations.
Performance Evaluation Form	30, 60, 90, and 180-day formal evaluations.
Confirmation of Permanent Employment Notice	Month 6. Formal documentation of the employment decision.



MANAGER'S TOOLKIT | MODULE 04

Performance Management

Sustaining Clarity, Accountability, and Growth

Strong onboarding builds trust. Clear expectations create direction. Performance management ensures that clarity and accountability continue throughout the employee's entire journey.



MODULE OVERVIEW



What's In This Module

This module covers the full performance management cycle. It gives managers the frameworks, conversation guides, templates, and cultural tools to manage performance consistently, proactively, and fairly across Filipino offshore teams.

Section	What It Covers
<u>Why This Matters</u>	The case for performance management that is both structured and culturally aware.
<u>The Performance Management Cycle</u>	The five-stage cycle that keeps clarity and accountability continuous.
<u>1. Goal Setting</u>	How to set clear, impact-linked goals. Includes templates and a quick-check tool.
<u>2. Ongoing Coaching and Feedback</u>	The Kapwa Coaching Model and how to guide performance in real time.
<u>3. Quarterly Performance Conversations</u>	Structure, prompts, and flow for quarterly reviews.
<u>4. Annual Performance Review</u>	How to evaluate results and behaviors fairly and consistently.
<u>5. Performance Improvement Plan (PIP)</u>	The full PIP workflow, with templates and cultural guidance.
<u>6. Calibration and Decision-Making</u>	How to ensure consistency across ratings and decisions.
<u>7. Documentation and Follow-Up</u>	What to document, why it matters, and how to do it efficiently.
<u>8. Business Continuity (BCP)</u>	How to manage performance during disruptions specific to the Philippines.
<u>Performance Management Summary</u>	The key principles and a self-check for managers.



Why This Matters

Without regular alignment, coaching, and feedback, even capable employees lose clarity about expectations or hesitate to raise concerns. Performance drifts quietly, and by the time a manager notices, the gap has grown larger than it needed to be.

For Filipino teams, performance conversations are closely tied to relationships, respect, and psychological safety. Employees are more likely to engage, ask questions, and improve when feedback is delivered constructively and within a supportive relationship.

When Performance Management Is Structured and Culturally Aware	The Result
Employees raise issues early	Problems are smaller and cheaper to solve.
Alignment on expectations happens faster	Less rework, fewer missed deadlines.
Feedback is delivered respectfully	Employees receive it, act on it, and trust the process.
Coaching is continuous, not episodic	Performance does not wait for reviews to improve.
Cultural dynamics are acknowledged	Filipino employees feel seen and supported, not just evaluated.

Performance management is not a one-time evaluation. It is the ongoing leadership practice that keeps your team clear, capable, and committed.





The Performance Management Cycle

Performance management moves through five key stages. Each stage reinforces clarity, accountability, and trust. The cycle is continuous: it does not end after the annual review. It starts again.

Stage	Purpose	Frequency
1. Goal Setting	Align expectations and define success metrics.	Annually, with quarterly alignment
2. Ongoing Coaching and Feedback	Reinforce strengths and address issues early.	Continuous, in every 1:1 and check-in
3. Quarterly Performance Conversations	Review progress and adjust priorities.	Every quarter
4. Annual Performance Review	Evaluate overall performance and development.	Annually
5. Performance Improvement (if needed)	Structured support for sustained improvement.	As needed, when coaching alone is insufficient





The Employee Lifecycle Overlay

Performance management maps to the employee lifecycle. Here is how the five stages connect to the broader journey.

Lifecycle Stage	Performance Management Focus
Familiarization (0-1 month)	Onboarding, clarity, early check-ins. Goal setting begins at Month 2.
Ownership (1-3 months)	Goal setting, early feedback, accountability building.
Two-Way Communication (3-6 months)	Coaching, quarterly review, identifying blockers.
Confident Contributor (6-12 months)	Stretch assignments, recognition, quarterly and annual reviews.
Capability Builder (1 year+)	Annual reviews, PIPs if needed, succession planning, long-term growth.



STAGE 01

Goal Setting: Creating Clarity and Alignment

Manager focus: Ensure employees clearly understand expectations, priorities, and how their work contributes to team and company objectives.

Manager Tip

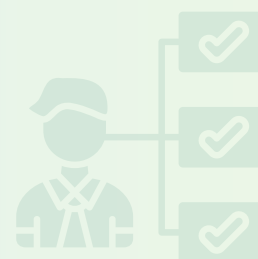
Treat goal setting as a collaborative discussion, not a documentation exercise. Ask what the employee sees as their biggest priorities, what challenges might affect delivery, and what support they need. This increases ownership and engagement.



Filipino employees may say yes quickly out of respect for authority, even if expectations are unclear or unrealistic. To confirm alignment, ask: Can you walk me through how you plan to approach this goal?

Manager Responsibilities

- Define clear performance objectives.
- Align individual goals with team priorities.
- Confirm expectations and success metrics.
- Document goals for monitoring and evaluation.



Goals should follow the SMART + Impact framework introduced in Module 3. This section focuses on how goal setting operates throughout the ongoing performance cycle, not just at onboarding.



Goal Setting Template

Use this for each employee at the start of the year and at each quarterly alignment. Complete all fields before the goal-setting conversation.

Employee Name:

Goal Title:

Specific Outcome (What exactly needs to happen?):

Success Metric (How will we measure it?):

Timeline (By when?):

Business / Client Impact (Why this matters):

Capacity Check (Is the workload realistic?):





Goal Setting Example

Goal	KPI / Metric	Weight
Billable Utilization	80%	25%
NPS	100%	25%
Project / SMA Hours	85% Completion	25%
Training and Development	-	15%
Attendance and Reliability	100% attendance	10%

Goal-Setting Quick Check

Run through this before finalizing any goal.

- Is the goal specific and measurable?
- Is the success metric clear?
- Is the workload realistic?
- Does the employee understand the business impact?
- Has the employee confirmed their capacity to take this on?
- Have you followed up in writing?



STAGE 02

Ongoing Coaching and Feedback: Guiding Performance in Real Time

Performance management should not happen only during formal review cycles. Continuous coaching and feedback reinforce strong performance and address small gaps before they grow into large ones.

Manager Responsibilities

- Provide timely feedback on work output.
- Recognize strong performance and effort.
- Address performance gaps early.
- Offer guidance and development support.



Regular coaching prevents small issues from becoming major performance concerns.

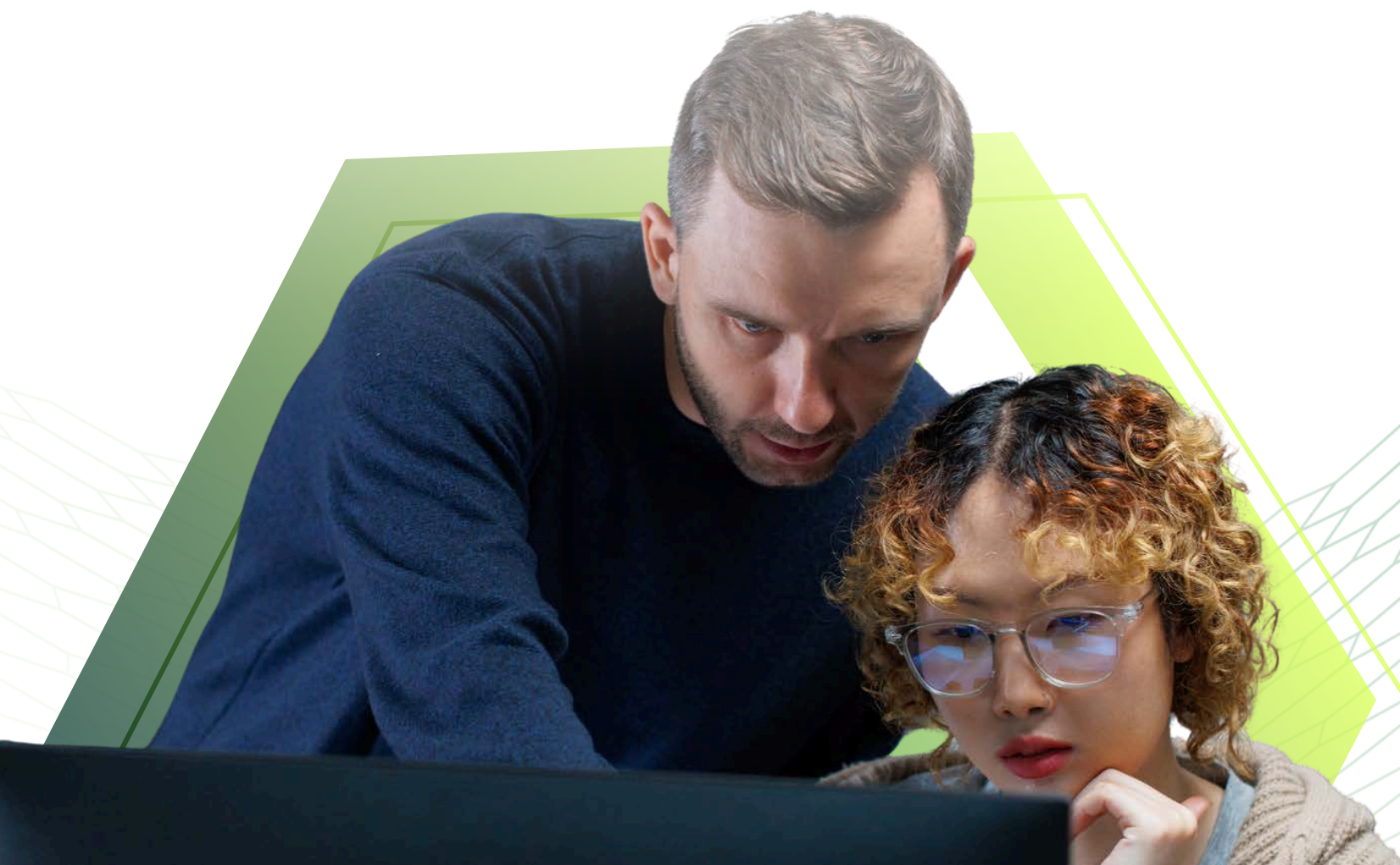




The *Kapwa* Coaching Model

Filipino employees respond best to coaching that preserves dignity, respect, and relationship harmony. When feedback respects this relationship dynamic, employees are more receptive to improvement discussions.

Step	What You Do	Example Language
Connection First	Begin with rapport or recognition of effort.	"I want to start by recognizing the work you put into [specific task] this week."
Context Second	Explain the situation or observation clearly.	"I noticed that [specific situation]. I wanted to talk through it with you."
Feedback Third	Describe the behavior or outcome that needs improvement.	"What I observed was [specific behavior]. The impact was [specific result]."
Solution Together	Involve the employee in identifying solutions.	"What do you think would help here? I have some thoughts too, but I want to hear yours first."
Clear Expectations	Confirm what success looks like moving forward.	"Going forward, what I need to see is [specific behavior]. Does that feel clear?"





Coaching in Practice: Before and After

Manager Tip

Before giving feedback, ask yourself: Did I acknowledge the employee's effort? Did I clearly describe the behavior or outcome? Did I invite the employee into the solution?



Direct criticism delivered abruptly may feel personal. Focus feedback on observable behaviors, outcomes, and improvement actions. Avoid personality-based comments.

Instead of This

Say This

"This needs to be fixed."

"I appreciate the work you have done on this. Let's review a few improvements so the outcome is even stronger."

"You are not communicating well."

"I noticed the last three client updates were sent after the deadline. Let's talk about what is getting in the way and how we can fix it."

"Why did this happen?"

"Walk me through what happened here. I want to understand the full picture before we figure out next steps."

Delivering feedback in a team meeting

Sending a private message or scheduling a 1:1 to address the concern.



Real-Time Feedback Prompts

After strong performance:

Manager: I want to call out the work you did on [specific task]. The way you handled [specific detail] made a real difference. That is exactly the kind of contribution I want to keep seeing.

When addressing a gap early:

Manager: I wanted to flag something before it becomes a pattern. On [specific task], I noticed [observation]. I do not think it is a big issue yet, but I want to make sure we address it now while it is small.

When checking in on a recurring issue:

Manager: Last time we spoke, we agreed on [action]. How is that going?
What is making it easier or harder?



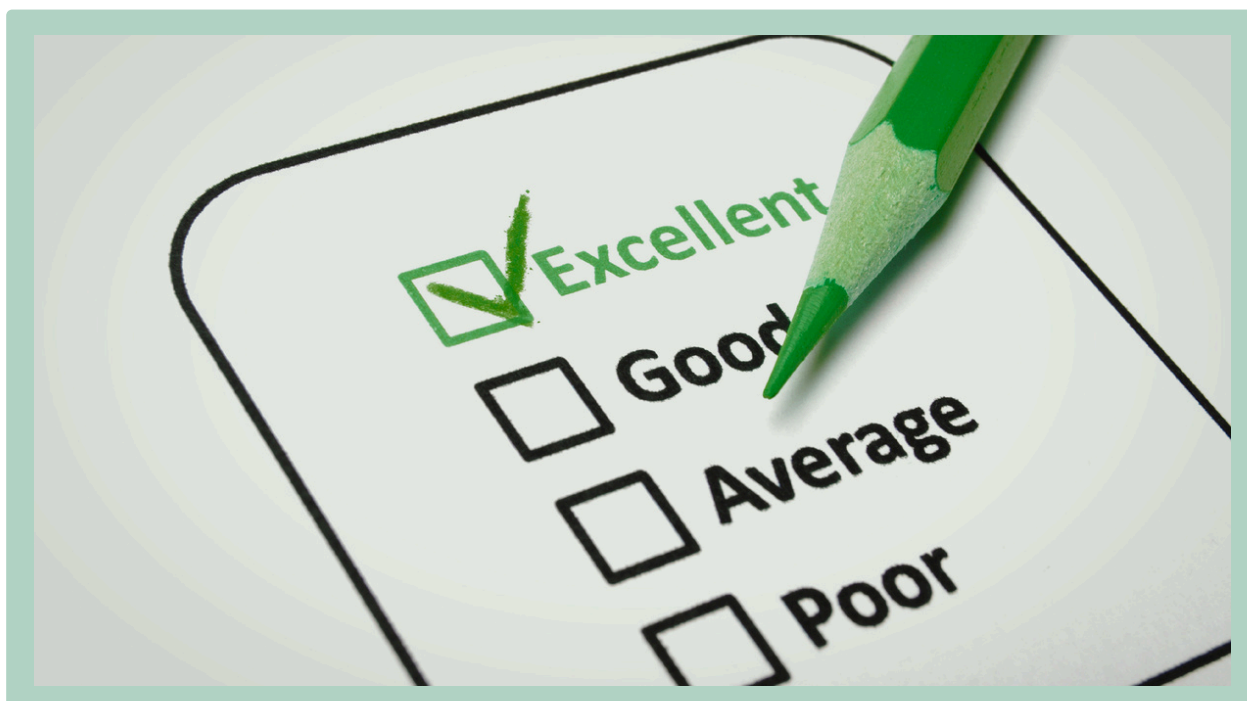
STAGE 03

Quarterly Performance Conversations: Maintaining Alignment

Quarterly reviews provide structured opportunities to evaluate progress and adjust priorities. They should feel development-focused, not purely evaluative. Think of them as a chance to zoom out, look at the full picture, and make sure the employee is still on the right track.

Manager Tip

Encourage reflection by asking open questions. What progress are you most proud of this quarter? What challenges slowed you down? What support would help you succeed next quarter?



Filipino employees may hesitate to openly discuss mistakes or challenges due to hiya, the desire to avoid embarrassment. Create a safe environment for honest discussion. Start by sharing something you yourself found challenging this quarter.

Manager Responsibilities

- Review progress toward goals.
- Discuss strengths and challenges.
- Provide coaching and guidance.
- Adjust goals when business priorities change.





Quarterly Conversation Flow

Step	What Happens	Sample Prompts
1. Start with Recognition	Acknowledge specific contributions from the quarter before anything else.	"Before we get into the review, I want to recognize [specific contribution]. That stood out this quarter."
2. Review Goals and Results (What)	Go through each goal. Share the rating and evidence. Invite the employee to share their own assessment.	"How do you assess your performance on this goal? Walk me through your thinking."
3. Discuss Behaviors (How)	Discuss how the work was done, not just what was delivered.	"What has your collaboration with the team looked like this quarter? Where did you take initiative?"
4. Identify Development Opportunities	Connect current performance to future growth.	"Based on this quarter, what is the one area you want to develop most in the next three months?"
5. Agree on Next Steps	Confirm actions, priorities, and any goal adjustments.	"Let's agree on the top three priorities for next quarter and what support you need from me."





Quarterly Review Documentation

Employee Name and Quarter:

Goal 1: Result and Rating (1-5):

Goal 2: Result and Rating (1-5):

Goal 3: Result and Rating (1-5):

Behavioral Competency Notes:

Development Focus for Next Quarter:

Agreed Actions and Next Steps:



STAGE 04

Annual Performance Review: Evaluating Results and Behaviors

The annual review consolidates performance discussions from the full year. It should not introduce new feedback. Employees should already understand their performance standing from quarterly reviews and coaching discussions.

Performance is evaluated across two dimensions: what was achieved and how it was achieved. Separating these ensures a balanced, fair evaluation.



Filipino employees value respectful communication and relationship harmony. Deliver feedback with balance: acknowledge achievements, explain improvement areas, and emphasize future development. This order matters.

The Two Dimensions of Performance

Dimension	What It Covers	Examples
Performance Results (What)	Goal completion, KPI achievement, output quality	Billable utilization at 85%, NPS score of 9.2, all project deliverables submitted on time
Behavioral Competencies (How)	Communication, collaboration, initiative, accountability, alignment with company values	Consistently flagged issues early, proactively supported teammates, took ownership of client escalation



Rating Scale

Rating	Description	What It Looks Like
5: Exceptional	Far exceeds expectations	Exceeds all goals consistently. Role model behavior. Often helps others reach their goals too.
4: Exceeds	Often exceeds expectations	Consistently high-quality output. Takes initiative. Goes beyond what is asked.
3: Meets	Meets expectations	Completes all assigned tasks reliably. Meets deadlines. Delivers quality work.
2: Needs Improvement	Below expectations	Requires frequent coaching or follow-up. Some targets missed. Improvement plan may be needed.
1: Unsatisfactory	Fails to meet expectations	Goal achievement is minimal. Frequent errors or missed deadlines. Formal intervention required.

Annual Review Conversation Flow

Step	What Happens
1. Open Personally	Start with rapport. This is the most important review of the year. The relationship layer matters even more here.
2. Set the Frame	"This is a conversation about the full year: what you achieved, how you worked, and where you are going. I want it to be two-way."
3. Review Results	Go through each goal. Share evidence. Invite the employee's self-assessment. Assign ratings using the 1-5 scale.
4. Review Competencies	Walk through each behavioral competency. Share specific examples. Rate using the 1-5 scale.
5. Capacity Check	Ask about workload, any silent pressures, and whether anything held them back from performing at their best.
6. Development and Career	Discuss IDP, career goals, and growth opportunities. This is where the annual review intersects with career management.
7. Overall Rating and Summary	Share the overall rating, the rationale, and expectations moving forward. Confirm alignment.
8. Close with Clarity	"How does this land for you? What questions do you have? I will send a summary after this conversation."



Annual Review Documentation

Employee Name and Review Period:

Overall Performance Rating (1-5) and Rationale:

Key Achievements This Year:

Behavioral Competency Summary:

Development and IDP Notes:

Agreed Actions and Career Conversation Outcomes:



STAGE 05

Performance Improvement Plan (PIP)

A PIP is used when performance gaps persist despite coaching and feedback. The purpose is structured improvement. It is a tool for clarity and accountability, applied with respect and care.

Manager Tip

Focus improvement plans on specific behaviors and measurable outcomes. Instead of saying Improve communication, say Provide weekly project updates every Friday. Specificity removes ambiguity and makes the plan fair.



Employees may verbally agree even when uncertain. Confirm alignment by asking: Can you summarize the improvement plan in your own words?

A PIP should never come as a surprise. If an employee reaches this stage, they should already be aware of the performance concern from prior coaching conversations.



PIP Workflow

Week	Focus	Manager Actions	Employee Actions
Week 1	Clarify the Issue	Identify performance gaps, define measurable improvement targets, document expectations and timeline	Confirm understanding of expectations, agree to improvement goals
Week 2	Coaching and Support	Provide guidance and feedback, conduct weekly check-ins, offer training or tools if needed, focus on removing blockers	Implement agreed actions, raise blockers early
Week 4	Midpoint Review	Assess progress toward improvement goals, identify remaining gaps, determine if additional support is needed	Self-assess progress, raise any concerns or barriers
Week 8	Final Evaluation	Determine outcome: improvement achieved, extended monitoring period, or escalation to HR for further action	Demonstrate sustained improvement against agreed targets





PIP Template

Employee Name:

PIP Start Date and Review Date:

Performance Gap

(What specifically needs to improve? Be observable and measurable):

Improvement Target

(What does success look like? How will it be measured?):

Timeline (By when must improvement be demonstrated?):

Support Provided

(What resources, training, or coaching will the manager provide?):

Check-In Dates (Week 2, Week 4, Week 8):

Midpoint Review Notes (Week 4):

Final Evaluation Outcome and Rationale (Week 8):

PIP Conversation Guide

Opening the PIP conversation:

Manager: I want to have an honest conversation with you today. Over the past few weeks, we have discussed [specific performance concern]. I want to make sure we address this together with a clear plan. I am not here to put you on notice. I am here to make sure you have what you need to succeed.

Presenting the improvement targets:

Manager: Here is what I need to see over the next eight weeks: [specific targets]. I will support you by [specific actions]. We will check in weekly so nothing catches us off guard.

Closing and confirming understanding:

Manager: Can you walk me through the plan in your own words? I want to make sure we are fully aligned before we start.





STAGE 06

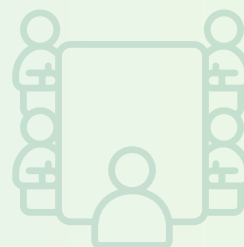
Calibration and Decision-Making

Calibration ensures that performance ratings are applied consistently across the team and organization. It protects against bias, ensures high performers are recognized accurately, and ensures development opportunities are fairly distributed.

What Calibration Addresses	Why It Matters
Rating consistency	Two employees with similar performance should receive similar ratings, regardless of who their manager is.
High performer recognition	Top performers should be identified accurately and rewarded accordingly.
Fairness across the team	Development opportunities, compensation adjustments, and promotions should follow consistent criteria.
Manager bias	Calibration creates a check on individual manager tendencies to rate too high, too low, or too narrowly.

What Calibration Discussions May Influence

- Promotions.
- Compensation adjustments.
- Development opportunities.
- Succession planning.



HR leads calibration discussions. Managers should come prepared with documented evidence for every rating. Undocumented ratings are difficult to defend in calibration.

Manager Prep Checklist for Calibration

- All employee ratings are documented with specific evidence.
- Ratings are based on patterns across the review period, not recent incidents.
- All ratings are consistent with the official 1-5 scale definitions.
- High performers have been identified and documented.
- Any PIP cases or risk employees are flagged for HR.





STAGE 07

Documentation and Follow-Up

Documentation is not a bureaucratic requirement. It is the evidence base that makes every performance decision defensible, fair, and clear. In the Philippines, undocumented actions are treated as non-existent in labor proceedings. Proper documentation protects both the manager and the employee.

If it was not documented, it effectively did not happen.

What to Document

What	Why	How
Performance goals	Provides the baseline against which all evaluations are made.	Document in writing after every goal-setting conversation. Share with the employee.
Coaching discussions	Creates a record of guidance given, issues raised, and actions agreed.	Use the Coaching Session Tracker from Module 2. Keep it brief but consistent.
Review outcomes	Documents the formal record of quarterly and annual performance ratings.	Complete the Performance Evaluation Form for every review. Store it in the employee's file.
Improvement plans	Provides the evidence base for any further action and protects against legal risk.	Use the PIP Template. Document every check-in and the final outcome.
Feedback conversations	Shows a pattern of coaching before escalation.	A brief written note after every significant feedback conversation is sufficient.





Documentation Best Practices

- Write it the same day. Memory fades quickly. A brief note immediately after a conversation is more accurate than a detailed write-up a week later.
- Be factual and specific. Document what was observed and agreed, not your interpretation of the person's character.
- Send a written follow-up to the employee after every key conversation. This creates shared accountability and removes ambiguity.
- Store documentation consistently. Use whatever system your organization uses. The important thing is that it is findable.
- Involve HR early for complex cases. If a situation feels like it may escalate, loop in HR before it does.





STAGE 08

Business Continuity and External Factors

Managers should evaluate performance while recognizing operational realities that may affect employees working from the Philippines. The goal of performance management is not to penalize employees for circumstances beyond their control. It is to ensure clear expectations, accountability, and continuity of operations.

External Factor	Impact on Operations	Manager Response
Typhoons and Severe Weather	Employee unable to travel, power outages, internet disruption	Set expectations for early communication. Have a task turnover plan ready.
Internet Service Interruptions	Connectivity loss, delayed communication, missed meetings	Establish an SMS or mobile backup contact method. Define update frequency.
Power Outages	Device shutdown, inability to work, data loss risk	Encourage backup power solutions. Define a check-in protocol.
Transportation Disruptions	Late starts, inability to reach alternative work locations	Clarify remote-first expectations. Confirm home setup is adequate.

Setting Expectations Early

Managers should proactively discuss these realities with employees before disruptions occur. Setting this expectation early prevents confusion and positions the employee to respond well when it happens.

Manager: I understand that the Philippines often experiences typhoons, power interruptions, or internet disruptions. If these situations affect your ability to work, please communicate as early as possible, provide clear turnover of urgent tasks, and keep the team updated on your status. We are not going to penalize you for the weather. We do need you to communicate early so we can cover for you.



Business Continuity Communication Plan

Every employee should know exactly what to do if they lose connectivity. Define this clearly and share it in writing during onboarding.

Step	Action Required
1	Immediately notify the manager or designated team contact via SMS or mobile message.
2	Provide a brief update: nature of the issue (internet outage, power outage, etc.) and estimated restoration time if available.
3	If urgent work is affected, coordinate task turnover or endorsement to the assigned backup or teammate.
4	Provide periodic updates until connectivity is restored.

Practical Continuity Measures

Managers may encourage employees to prepare backup options:

- Secondary internet connections (mobile hotspot or backup provider).
- Feasible power backup solutions.
- Alternative work locations during extended outages.

The Buddy System

Teams may implement a buddy system where a designated colleague temporarily covers urgent tasks during unexpected disruptions. This reinforces team collaboration and shared responsibility.

Buddy System Component	What It Covers
Backup coverage identification	Each team member has a designated buddy who covers critical tasks during disruptions.
Clear turnover procedures	The buddy knows where key files, contacts, and tasks are. Handover happens without a briefing.
Visibility of who steps in	The whole team knows the buddy system. There is no ambiguity about who covers what.

Filipino employees may hesitate to report disruptions early if they feel they are causing inconvenience to the team. Emphasize that early communication is encouraged and appreciated. It allows the team to adjust plans and maintain service continuity.



OPTIONAL

Optional Performance Enhancements

Managers may strengthen performance management through additional practices. These are not required but are recommended for high-collaboration roles and teams focused on long-term growth.

Enhancement	Best For	How to Activate
360-Degree Feedback	Collaboration-heavy roles, managers, team leads	Coordinate with HR. Collect structured feedback from peers, direct reports, and clients.
Recognition Highlights	Teams where engagement or motivation needs reinforcing	Add a recognition moment to every team meeting. Document contributions in a shared tracker.
Career Development Discussions	All employees, especially those at the 12-month mark	Run a dedicated career conversation separate from the performance review. Use the IDP as the anchor.





SUMMARY

Performance Management Summary

Effective performance management ensures employees always know what is expected of them, how they are performing, and how they can improve.

For Filipino teams, successful managers balance clear expectations with relationship-based leadership. This creates an environment where employees feel supported while remaining accountable for results.

When Applied Consistently	The Team Becomes
Clear expectations are set and confirmed	Confident. Employees know what good looks like and are not guessing.
Coaching is continuous, not episodic	Proactive. Employees raise issues early because they know they will be heard.
Feedback is delivered respectfully	Receptive. Employees act on feedback because it is delivered within a relationship of trust.
Documentation is consistent	Protected. Decisions are defensible and fair.
Cultural dynamics are acknowledged	Engaged. Filipino employees feel seen, respected, and invested in the team's success.

Manager Self-Check

Run through these questions regularly, not just before review season.

- Are my employees clear on what is expected of them?
- Am I giving feedback regularly, not just when something goes wrong?
- Have I checked capacity recently, not just accepted yes?
- Am I coaching proactively, before issues escalate?
- Are my ratings based on patterns and evidence, not recent events?
- Have I documented key conversations?
- Do my employees know where they stand?
- Have I recognized contributions recently?

Performance management is not what you do to employees. It is what you do with them.



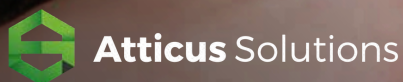
QUICK REFERENCE

Module 04 at a Glance

Stage	Frequency	Key Tools
Goal Setting	Annually, with quarterly alignment	Goal Setting Template, KPI Sheet, SMART + Impact Framework
Ongoing Coaching and Feedback	Continuous, every 1:1 and check-in	Coaching Session Tracker (Module 2), Sample Language Guide
Quarterly Performance Conversations	Every quarter	Quarterly Review Form, Quarterly Documentation Template
Annual Performance Review	Annually	Annual Review Template, Rating Scale, Annual Documentation Form
Performance Improvement Plan	As needed	PIP Template, PIP Conversation Guide
Calibration	Aligned with review cycles	Rating documentation, HR coordination
Documentation	After every key conversation	Coaching Session Tracker, Performance Evaluation Form
BCP Planning	At onboarding, updated annually	BCP Communication Plan, Buddy System Setup



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MANAGER'S TOOLKIT | MODULE 05

Employee Engagement

Sustaining Motivation, Connection, and Performance

Strong onboarding builds trust. Clear performance management builds accountability. Without engagement, both weaken over time.



MODULE OVERVIEW



What's In This Module

This module equips managers with the tools, habits, and cultural understanding to lead engagement intentionally and consistently. Engagement is not an event. It is the ongoing experience your team has of feeling valued, connected, and invested in their work.

Section	What It Covers
Why This Matters	Why engagement is a performance driver, and how disengagement shows up in Filipino teams.
Filipino Culture and Engagement	The cultural dynamics that shape engagement for Filipino employees.
3 Key Engagement Habits	The three habits every manager should practice consistently.
Tool 01: Engagement Activities	Types of activities, a planning framework, and a sample engagement calendar.
Tool 02: Team Milestone and Celebration Log	How to track and acknowledge wins employees may not share themselves.
Tool 03: Mental Health Awareness	How to use 1:1s as temperature checks and recognize signs of struggle.
Tool 04: Well-Being Check-In Guide	Prompts and structure for well-being conversations.
Tool 05: Employee Engagement Survey	How to use survey data to drive meaningful improvement.
Tool 06: 360-Degree Leadership Feedback	How to gather, receive, and act on multi-directional feedback.
Cultural Anchors for Engagement	Filipino holidays, family milestones, and collective wins.
Leadership Checkpoint	A structured self-check for managers on engagement leadership.



Why This Matters

For Filipino employees, engagement is closely tied to relationships, harmony, and feeling valued. Disengagement rarely shows up as complaints. It appears quietly through reduced participation, lower initiative, emotional withdrawal, and eventual attrition.

By the time a manager notices the signs, the employee is often already halfway out the door. Intentional engagement prevents this.

What Disengagement Looks Like in Filipino Teams	What It Usually Means
Quieter in meetings, less likely to contribute ideas	The employee does not feel safe or valued enough to speak up.
Stops raising concerns or asking questions	Trust has eroded. They have learned that speaking up does not help.
Consistent overtime with no escalation	Silent overcommitment. They are absorbing pressure rather than flagging it.
Declining quality or missed deadlines	Burnout or disengagement has reached the point of affecting output.
Reduced participation in team activities	A sense of disconnection from the team. Belonging has weakened.

Managers who intentionally lead engagement create teams that remain motivated, perform consistently, and stay committed long-term.





The Business Case for Engagement

Performance management maps to the employee lifecycle. Here is how the five stages connect to the broader journey.

When Engagement Is Strong	The Result
Employees feel valued and recognized	Higher satisfaction and lower attrition.
Employees feel safe to speak up	Issues surface earlier, reducing escalation and rework.
Teams celebrate wins together	Stronger cohesion, better collaboration, higher morale.
Managers check in on well-being regularly	Burnout is caught early. Performance stays stable.
Recognition is consistent	Employees stay motivated between the big milestones.

Higher Engagement = Satisfaction + Performance + Retention





CULTURAL FOUNDATION

Filipino Culture and Engagement

Filipino employees place strong value on relationships, harmony, and shared experiences at work. Engagement is strengthened when managers create opportunities for connection, recognition, and collective celebration.

What Managers Should Know

Cultural Dynamic	What It Means for Engagement
Employees hesitate to highlight their own achievements	Filipino humility means wins often go unacknowledged unless the manager actively surfaces and celebrates them.
Employees avoid raising concerns directly	Disengagement and frustration are rarely stated outright. Managers need to create the opening and ask directly.
Employees prioritize team harmony over personal recognition	Group activities and collective wins often matter more than individual spotlighting.
Family is central to Filipino identity	Recognizing personal milestones such as a new child, graduation, or marriage signals genuine care and builds loyalty.
Celebrations are culturally significant	Skipping milestones and shared moments consistently creates distance between managers and the team.

Because of these dynamics, intentional recognition, regular check-ins, and shared celebrations are not optional extras. They are the foundation of engagement in Filipino offshore teams.



CORE HABITS

3 Key Engagement Habits for Managers

Consistently practicing these three habits naturally strengthens engagement over time. They require no budget and no special event. They require consistency.

Habit 1: Recognize Effort Weekly

Filipino employees often show humility and may hesitate to highlight their own achievements. Managers should actively acknowledge effort, collaboration, and positive contributions every week.

Recognition can be simple:

- Verbal appreciation during a meeting.
- A quick message in the team chat.
- A short acknowledgment during a check-in.

Consistency matters more than formality. A brief, genuine acknowledgment every week is worth more than a formal recognition event once a year.



Sample recognition language:

Manager: Thank you for supporting the team during the X project last week. The way you handled the client's concern and maintained composure in a difficult conversation is a great example to the team.

Manager: I noticed how you helped onboard the new hire. That kind of support means a lot to everyone, including me.

Manager: I want to call out the work you put into [specific task] this week. It made a real difference and I want to make sure that gets recognized.



Habit 2: Conduct Monthly Engagement Check-Ins

Managers should hold conversations that go beyond performance discussions to understand employee energy and well-being. These are separate from goal reviews. The focus is on the person, not the output.

These conversations help surface:

- Workload pressure.
- Motivation levels.
- Team dynamics.
- Emerging concerns before they become problems.

Monthly engagement check-in prompts:

Manager: How has your workload been feeling lately?

Manager: What has been energizing or draining recently?

Manager: Is there anything we could improve as a team?

Manager: What has been going well that I should make sure we keep doing?

Manager: Is there anything you have been holding back from raising? I want to hear it.

Habit 3: Celebrate Team Milestones

Celebrating wins reinforces motivation and strengthens team connection. In Filipino teams, celebrations do not need to be elaborate. Simple shared moments can significantly strengthen engagement.

Examples of milestones worth celebrating:

- Project completion or go-live.
- Positive client feedback.
- Work anniversaries and birthdays.
- Team achievements during busy periods.
- Personal milestones: new child, graduation, marriage.

Manager Tip

Participation signals value. Your presence in the celebration matters more than the activity itself. Recognition does not require rewards. Attention and gratitude already build engagement.



TOOL 01

Engagement Activities

Manager focus: Strengthen connection through shared experiences that feel inclusive, familiar, and meaningful.

In Filipino workplaces, engagement works best when it feels collective rather than individual, uses food, celebration, and shared moments, and recognizes effort without forcing spotlight pressure.

Avoid activities that feel forced or exclusionary. Filipino employees value harmony and inclusion over individual spotlighting. The goal is for everyone to feel part of something, not singled out.



Types of Engagement Activities

Type	Examples	Purpose
Connection and Togetherness	Team salu-salo (in-person gatherings), virtual kamustahan sessions, project go-live reflections, team building or company retreats, client visits	Build connection and reinforce shared identity
Recognition and Celebration	Birthday and work-anniversary acknowledgments, end-of-project appreciation moments, gratitude shout-outs during meetings or in group chats	Reinforce motivation and show employees they are seen
Cultural and Family Moments	Observing Filipino holidays and festive seasons, acknowledging personal and family milestones such as new child, graduation, marriage	Signal genuine care and deepen loyalty
Well-Being	Regular engagement check-ins, kamustahan conversations, mental wellness activities	Sustain energy, catch burnout early, maintain morale



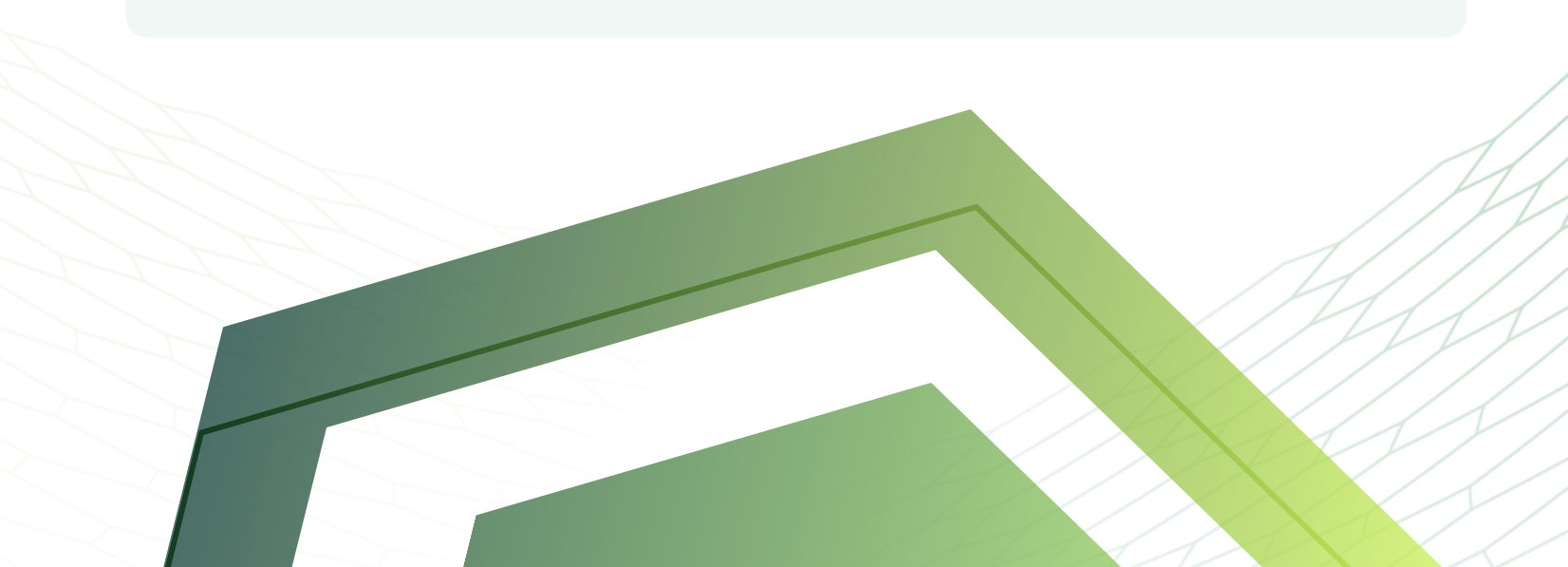
Engagement Activity Planner

Use this to plan engagement activities intentionally across the quarter. Spontaneous recognition is valuable. Planned engagement is sustainable.

Mode	Planned Activity	Date / Frequency	Owner	Notes
Social		Monthly		
Recognition		Weekly		
Cultural		As relevant		
Well-being		Monthly		
Milestone		Quarterly		

Recommended Engagement Frequency

Frequency	Type of Engagement
Weekly	Light recognition: verbal appreciation, team chat shout-out, acknowledgment in a check-in.
Monthly	Team activity or shared moment: virtual coffee, kamustahan, team update celebration.
Quarterly	Milestone celebration or reflection: project close-out, quarterly win recognition, team retrospective.
Annually	Retreat or recognition event: year-end celebration, awards, team offsite if applicable.





Sample Engagement Calendar

Month	Suggested Activity
January	Team momentum kick-off and strategic planning session.
February	Appreciation week. Recognize individual contributions publicly.
March	Mental wellness activity or dedicated well-being 1:1 check-ins.
April	Holy Week acknowledgment. Plan around leave and rest.
June	Mid-year celebration. Acknowledge first-half achievements.
August	Kamustahan session. Check in on team energy heading into Q3.
September	Client visit or project highlights. Celebrate team impact.
November	Virtual or in-person thanksgiving. Family-oriented recognition.
December	Year-end gratitude and recognition. Holiday celebrations and planning.





TOOL 02

Team Milestone and Celebration Log

Filipino employees often downplay their achievements out of humility or respect. This means wins go unacknowledged unless the manager actively tracks and surfaces them.

Use this log to maintain a running record of contributions and milestones worth recognizing. Review it before every team meeting and every check-in.

Why This Works

Tracking wins means recognition becomes specific and timely, not vague and delayed. Employees notice the difference between a manager who says good job and a manager who says I saw what you did on Thursday and it made a difference.

What to Track

- Project completions and go-lives.
- Positive feedback from clients.
- Process improvements suggested or implemented.
- Extra effort during peak or high-pressure periods.
- Team collaboration and peer support moments.
- Personal milestones: birthdays, anniversaries, life events.



Team Milestone and Celebration Log

Date	Employee	What Happened	How It Was Recognized	Follow-Up Needed

Recognition Language Guide

Use specific, observable language when recognizing contributions. Generic praise is better than nothing. Specific praise builds trust.

Specific recognition examples:

Manager: Thank you for supporting the team during the X project last week. You stepped in when things were tight and it made a real difference.

Manager: I noticed how you helped onboard the new hire. You did not have to do that and the team saw it. It means a lot to us.

Manager: The way you handled the client concern, staying calm and professional in a difficult moment, is the standard I want the whole team to see.

Manager: I want to acknowledge the extra hours you put in during the go-live. That kind of commitment does not go unnoticed.





TOOL 03

Mental Health Awareness and Support

Manager focus: Create psychological safety in the workplace. Use 1:1s as temperature checks. You are not a therapist. Your role is to notice, ask, and connect employees to the right support.



Ask gently. Listen carefully. Avoid rushing to solutions. The most important thing you can do is make the employee feel heard before you do anything else.

Recognition Language Guide

Changes in behavior are often the first sign that an employee is struggling. Watch for:

Signal	What It May Indicate
Changes in energy or tone in meetings	Stress, anxiety, or disengagement building quietly.
Reduced participation or withdrawal	The employee is pulling back. Trust or motivation has decreased.
Consistent overtime or working outside hours	Silent overcommitment or fear of falling behind.
Increased errors or missed deadlines	Burnout has reached the point of affecting output.
Shorter responses, less proactive communication	The employee is withdrawing. This often precedes attrition.



Understanding the Filipino Cultural Context

Filipino employees may hesitate to share personal struggles because they:

- Are resilient and patient by cultural conditioning.
- Avoid complaining out of respect for the team and manager.
- Feel responsible for family stability and do not want to appear weak.
- Do not want to burden their manager.

What You May See	What It Often Means
Silence when asked how they are doing	Politeness may be masking real stress.
Consistently saying everything is fine	Trust has not been fully established yet.
Declining social participation	A sense of disconnection or emotional withdrawal.

Silence does not always mean okay. Trust must come before honesty. Your job is to create the conditions where honesty feels safe.



Key Temperature Check Areas in 1:1s

- Workload and pace: is it sustainable?
- Emotional energy: how is the person actually doing?
- External stressors: only if they are willing and comfortable to share.
- Sense of support and safety: do they feel they can raise concerns?



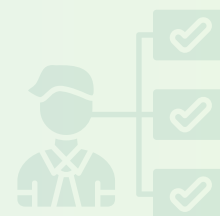


Mental Health Resources

Managers should be familiar with what is available and encourage access without stigma.

Resource Type	Manager's Role
Psychology consultations	Know they exist. Encourage access proactively. Never wait for a crisis.
Accredited mental health clinics	Refer employees to HR for details. Do not try to manage this yourself.
Teleconsultation services	Useful for employees who may be reluctant to attend in person.
Employee Assistance Programs (EAPs)	If available, remind employees regularly that these exist and are confidential.

Manager's role: Encourage use of mental health resources without stigma. Support access. Do not diagnose. Refer employees to HR or Atticus for details. Your job is to notice and connect, not to provide the support yourself.





TOOL 04

Well-Being Check-In Guide

Use this guide during monthly engagement check-ins or whenever you sense an employee may be struggling. Keep the tone warm and conversational. This is not an interrogation. It is a signal that you care.

Mental Health Resources

Opening

Manager: How have things been feeling for you lately, at work and on a personal level?

Manager: What has been taking up most of your energy lately?

Workload

Manager: What feels manageable right now? What feels challenging?

Manager: Are there any processes or workflows that have been draining your energy lately?

Manager: Is there anything on your plate right now that we should look at together?





Support

Manager: Are you comfortable raising your concerns with me? I want to make sure you feel safe doing that.

Manager: What kind of support would help you most right now?

Manager: Is there anything I could do differently that would make things easier for you?

Closing

Manager: What is one thing I or we can do better to support you going forward?

Manager: I am glad we talked. Let's make sure we keep this conversation going. You do not have to wait for our scheduled check-in to reach out.

After the Check-In

- If the employee shared concerns, follow up in writing with any agreed actions.
- If you observed signs of struggle but the employee did not open up, note it and check in again the following week.
- If the situation requires HR support, loop them in early. Do not wait for a crisis.
- If the employee needs mental health resources, provide the referral with warmth, not alarm.

Well-Being Check-In Tracker

Date	Employee	Topics Covered	Concerns Flagged	Actions Taken	Follow-Up Date



TOOL 05

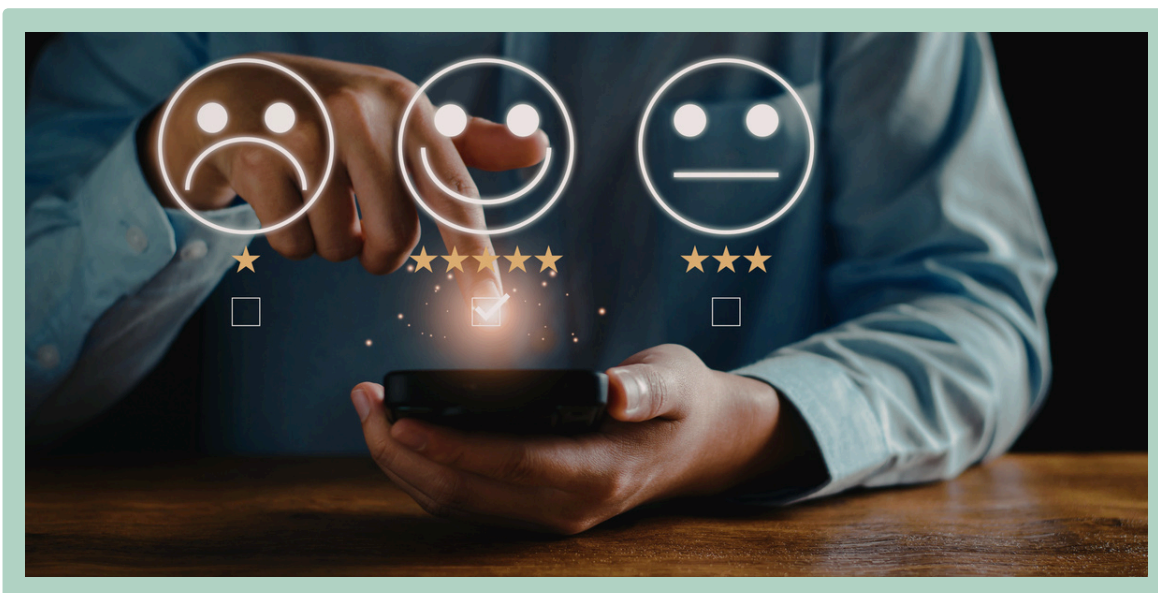
Employee Engagement Survey

The Employee Engagement Survey measures employee sentiment before and after engagement initiatives. Conducting both pre-activity and post-activity surveys helps determine whether engagement efforts are effective and where improvements are needed.

A survey link is distributed to employees to gather structured and confidential feedback. Results identify engagement drivers, areas of concern, and overall morale trends.

Manager Tip

Feedback without action reduces trust. Visible follow-through builds credibility. Even small, tangible improvements communicated clearly can significantly strengthen employee trust and engagement.



Employees may provide neutral or minimal responses out of politeness or deference to authority. Silence does not always indicate satisfaction. Look beyond surface-level scores. Examine patterns, tone in open-ended responses, and participation rates.

Manager Responsibilities

- Encourage participation without pressuring responses.
- Reinforce confidentiality and psychological safety so employees feel secure providing honest input.
- Review results with openness, not defensiveness.
- Share findings with the team and outline next steps.
- Treat survey results as development insights, not personal criticism.





How to Close the Loop After a Survey

Step	What to Do	Sample Language
1. Acknowledge the results	Share headline findings with the team. Be transparent about what came up.	"Here is what the survey told us. These were the themes that came through most clearly."
2. Identify what to act on	Pick two or three concrete improvements to focus on. Do not try to fix everything.	"Based on what we heard, here are the two things we are going to focus on this quarter."
3. Communicate the actions	Tell the team exactly what you are doing and why.	"You said [specific theme]. We are going to address that by [specific action]."
4. Follow through visibly	Do what you said you would do. Report back on progress.	"Last quarter you told us [issue]. Here is what has changed since then."
5. Run the next survey	Close the loop by measuring whether the changes made a difference.	"We want to check whether the changes we made actually helped. We are running the survey again next quarter."





TOOL 06

360-Degree Leadership Feedback

The 360-Degree Leadership Feedback program gives leaders a comprehensive view of their leadership from multiple perspectives. It gathers insights from clients, direct managers, peers, and direct reports.

All responses are treated confidentially to encourage honest and constructive feedback.



Employees may hesitate to provide upward feedback unless psychological safety is clearly reinforced. Communicate confidentiality clearly, position the process as developmental rather than evaluative, and reinforce that feedback will not result in negative consequences.

What This Is For

Best For	Why
People managers across departments	Leadership is multi-directional. Seeing yourself from multiple angles drives better leadership.
Roles requiring high collaboration	360 feedback surfaces blind spots in how collaboration and communication are actually experienced.
Development-focused leadership reviews	When the goal is growth, not just evaluation, 360 data gives richer and more actionable insight.
Succession planning and leadership readiness	Helps identify whether a high performer is also a strong leader in the eyes of those they lead.



How to Use the Feedback Well

After Receiving Feedback	Do This
Read it without defensiveness	Take time before responding. The goal is understanding, not defending.
Look for patterns, not outliers	One piece of critical feedback may be noise. Three pieces on the same theme is a signal.
Thank the team for their honesty	Do this in a team setting. It models the psychological safety you want to build.
Share key insights and intended changes	Tell the team what you learned and what you plan to do about it.
Demonstrate visible behavioral change	Trust is strengthened when leaders listen and then act, not just acknowledge.

Trust is strengthened when leaders listen and then act.

360 Feedback Action Plan

Key Strength Identified:

Key Development Area:

One Behavioral Change I Will Make:

How I Will Share This With My Team:

Review Date (When I Will Check My Progress):



CULTURAL GUIDE

Cultural Anchors for Engagement

Intentional engagement for Filipino offshore teams means weaving cultural touchpoints into your leadership rhythm. These are not extras. They are part of what makes your team feel seen.

Filipino Holidays and Cultural Celebrations

These are the major holidays and seasons when Filipino employees are most likely to request time off or be emotionally invested in what is happening at home. Plan around them. Acknowledge them.

Holiday / Season	When	What Managers Should Do
New Year	January 1	Acknowledge the new year. Celebrate the team's achievements from the previous year.
Holy Week	March or April (moveable)	Plan around leave requests. Many Filipino employees spend this time with family. Acknowledge its significance.
Labor Day	May 1	Recognize the team's work and contribution. A simple acknowledgment goes a long way.
Independence Day	June 12	Acknowledge Philippine independence. A brief cultural note shows respect.
All Saints Day / All Souls Day	November 1-2	Employees may travel to visit family graves. Plan around leave and acknowledge the occasion with care.
Ber Months (Sep-Dec)	September to December	This is the start of the holiday season in the Philippines. Energy and anticipation increase. Lean into it.
Christmas Season	December, sometimes from September	The most significant celebration in Filipino culture. Plan team activities, holiday baskets, and recognition. Communicate shutdown periods early.
New Year's Eve	Dec 2031	Plan around the shutdown period. Many employees celebrate with family. Acknowledge the close of the year.



Family Milestones and Life Events

Recognizing personal milestones signals malasakit and builds deep loyalty. These moments matter more than many managers realize.

Life Event	How to Acknowledge It
Marriage	Send a personal message of congratulations. Acknowledge it in the team if the employee is comfortable.
New child	Recognize the milestone warmly. Consider a small team gesture. Give the employee space during paternity or maternity leave.
Graduation	Acknowledge personal and family graduations. Education is deeply valued in Filipino culture.
Birthdays	A shout-out in the team chat or during a meeting. Simple but meaningful.
Work anniversaries	Recognize tenure explicitly. Loyalty is highly valued. Mark the milestone with specific recognition of contributions.
Bereavement	Reach out personally. Give space. Check in after the employee returns. Do not just move on.

Collective Wins

Celebrate team success. In Filipino culture, shared wins matter more than individual trophies. When the team wins, everyone should feel it.

- Additional team leave for a major project completion.
- Bonuses or recognition programs coordinated with Atticus.
- Team celebration moments: virtual lunch, salu-salo, appreciation messages.

Reminder

Skipping celebrations consistently may unintentionally create distance between managers and the team. Presence and acknowledgment are signals of leadership, not just formality.



MANAGER SELF-CHECK

Leadership Checkpoint

This checkpoint is designed to evaluate engagement leadership at key moments in the year: end-of-year reviews, start-of-year planning, and mid-year pulse checks.

It gathers manager, employee, and shared perspectives on what is working and what needs to change.

Manager Self-Check

Ask yourself these questions regularly, not just before review season.

- Have I recognized effort and contribution consistently this month?
- Have I created space for honest feedback and well-being discussions?
- Have I acted on engagement feedback shared by the team?
- Have I acknowledged any cultural or personal milestones this month?
- Have I celebrated team wins, big and small?
- Have I checked in on workload and energy, not just output?

Employee Check

Use these as prompts for engagement conversations or survey themes.

- Does the employee feel valued, appreciated, and recognized?
- Does the employee feel safe speaking up?
- Does the employee feel supported to do their best work?
- Does the employee feel connected to the team?

Shared Reflection

Use these in team retrospectives or end-of-quarter engagement reviews.

- What helped our engagement this period?
- Where were there disconnects?
- What should we stop, start, continue, or improve?



Final Engagement Question:

What kind of experience are we intentionally creating for this team?

This stage determines whether your team becomes capable but disconnected, or engaged, committed, and high-performing over time.

Outcomes of Effective Engagement

When Managers Consistently Lead Engagement	The Outcome
Recognition is consistent and specific	Higher employee satisfaction and sense of being valued.
Check-ins go beyond performance	Concerns surface earlier. Burnout is caught before it escalates.
Cultural moments are acknowledged	Deeper loyalty and a stronger sense of belonging.
Team milestones are celebrated	Stronger cohesion and sustained motivation.
Engagement surveys are acted on	Trust in leadership increases. Employees see that their voice matters.



[BACK TO HOME](#)



MANAGER'S TOOLKIT | MODULE 06

Career Management

Building Careers That Keep People

Career development is one of the strongest retention levers you have as a manager. When employees see a path forward, they stay.



MODULE OVERVIEW



What's In This Module

This module gives managers the tools and frameworks to actively support employee career growth. Development plans should be intentional, aligned with employee aspirations and organizational goals, and focused on strengthening current skills while preparing people for higher-level roles.

Section	What It Covers
Objective and Desired Outcomes	What career management should achieve for employees, managers, and the organization.
Annual and Monthly Goal Setting	How to set career goals that connect individual aspirations to business priorities.
Career Ladder Process	Five steps to defining, communicating, and developing career progression.
Team Career Development Plan	How to build a team-level roadmap for collective growth.
Individual Development Plan (IDP)	A fillable template for tracking each employee's development journey.
Training and Development Considerations	Types of training and the cultural context for Filipino teams.
Leadership Potential Competencies	The competency framework for assessing leadership readiness.
Capability Benchmarking Template	A structured tool for assessing employees against career level requirements.
Manager Actions and Guidance	What managers should do consistently to drive career development.

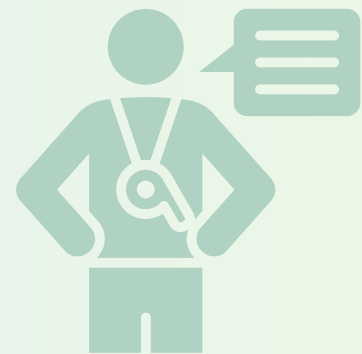


FOUNDATION

Objective and Desired Outcomes

Career management equips managers with practical tools and structured frameworks to actively support employee career growth. Development plans should be intentional, aligned with both the employee's aspirations and organizational goals, and focused on strengthening current skills while preparing employees for higher-level roles.

In Filipino workplaces, coaching and mentoring are highly valued. Employees respond better to personalized guidance and intentional development plans than generic training. Promotions are also a cultural norm in the Philippines. If the organization is lean, individual contributor positions may be broken down into levels to provide career progression anchored on expertise.



The Business Case for Engagement

For Employees	For Managers	For the Organization
Clear, personalized career paths with visible growth opportunities	Confidence in guiding development conversations and growth initiatives	Proactive, structured, and strategically aligned career development
Empowerment to enhance current skills and acquire new competencies	Tools to identify high-potential employees and prepare them for leadership	A deep leadership bench and a succession pipeline
Clear performance expectations through annual and monthly goal setting	A team roadmap that supports succession planning	Reduced attrition rooted in career dissatisfaction



TOOL 01

Annual and Monthly Goal Setting

Purpose: Create clarity on expectations and ensure alignment between employee aspirations, team objectives, and organizational goals.



Filipinos value inclusiveness and being part of a community. Help employees understand how they fit into the larger picture and how their growth connects to the team and the business. This helps them see opportunities beyond their current role.

Annual Goal Setting (Start of Year)

- Managers conduct a planning session with employees to set annual career and performance goals.
- Goals should be SMART: specific, measurable, achievable, relevant, and time-bound.
- Align individual and team goals with organizational priorities.

Monthly Goal Setting and Review

- Break annual goals into actionable monthly objectives.
- Track progress on deliverables, skill development, and key milestones.
- Adjust monthly goals as needed based on performance, business priorities, or learning opportunities.



Career and Performance Timeline

Conversation Type	Timeline	Purpose	Manager Role
Annual Goal Setting	Start of year	Set annual career and performance goals	Coach, align with team and org objectives
Monthly Goal Setting and Review	Monthly	Track progress, adjust objectives	Guide, provide resources, reinforce development
Quarterly Check-ins	Every 3 months	Review development, identify gaps	Coach, advise, provide resources
Mid-Year Performance Evaluation	June	Evaluate performance against annual goals	Give feedback, adjust development plans
Annual Career and Performance Review	December	Review overall performance and career trajectory	Align expectations and future opportunities
Development Planning	Twice a year	Identify skills and training needs	Provide guidance and access to programs





TOOL 02

Career Ladder Process

Purpose: Provide a structured approach for defining career progression, aligning employee development with organizational needs, and intentionally preparing employees for leadership or expert-level roles.

Step 1: Define Career Levels and Competencies

- Clearly outline roles, responsibilities, and expectations for each career stage (for example: Consultant, Senior Consultant, Principal Consultant, Solutions Architect).
- Identify requirements for each level: technical skills and leadership behaviors and competencies.
- Highlight skills needed to transition from current performance levels to higher-impact roles.

You may refer to the Atticus Leadership Competencies template as a starting point and create your own that is specific to your organization's priorities and needs.



Step 2: Communicate Career Paths

- Share transparent career ladders with examples of progression timelines and milestones.
- Include competencies, KPIs, and impact measures to show how skill development translates into career advancement.
- Reinforce how current skills can be enhanced to support future leadership or specialist roles.

Step 3: Individual Career Goal Setting

Managers should conduct structured discussions during 1:1s or performance reviews, identify short-term and long-term career goals aligned with the employee's strengths and aspirations, and ensure goals are designed to build leadership potential, technical expertise, or strategic capabilities.

Conversation starters for career goal setting:

Manager: I want your career to support your personal goals. Can you share your short and long-term personal goals with me?

Manager: What career advancement are you looking at that will allow you to achieve those personal goals?

Manager: Where do you see yourself in three years? What kind of work do you want to be doing?





Step 4: Develop Personalized Growth Plans

- Recommend targeted learning opportunities: training programs, mentorship, stretch assignments, cross-functional projects, or shadowing experiences.
- Identify specific skill gaps and provide resources or strategies to address them.
- Encourage employees to take ownership of their development journey.

Conversation starters for growth plan discussions:

Manager: Looking at your long-term goals, let's break down what you need to achieve each year to move closer to them.

Manager: You are strong at this. If you want to move up, we need to focus on developing this area.

Manager: This project is a great opportunity to develop the skills you said you wanted to build. Let's make sure you take it on with that goal in mind.

Step 5: Monitor Progress and Adjust

- Conduct quarterly check-ins to review progress, celebrate milestones, and adjust plans as needed.
- Align development efforts with evolving business priorities and employee performance.
- Adjust skill-building initiatives to prepare employees for leadership or expert-level responsibilities.

Employees do not need to be perfect before a promotion. If they hit 70-80% of the target role's requirements, the remaining areas can be part of their development plan while in the role. Assess whether the remaining gaps place the employee at an acceptable level of performance risk that leaders are willing to take.





TOOL 03

Individual Development Plan (IDP)

Use this template to document each employee's development journey. Initiate it during the annual review and update it continuously in coaching sessions. The IDP is a living document, not a once-a-year form.

Employee Name:

Role and Current Level:

Manager Name:

IDP Period (e.g. Jan-Dec 2025):

Career Goal (Where does the employee want to be in 1-3 years?):

Current Strengths (What is the employee already strong at?):

Development Areas (What skills or behaviors need to grow?):



Development Actions

Development Area	Action / Activity	Resource or Support Needed	Target Date	Status
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Stretch Assignment or Cross-Functional Opportunity:

Mentorship or Shadowing Plan:

Quarterly Progress Notes (Q1):

Quarterly Progress Notes (Q2):

Quarterly Progress Notes (Q3):

Quarterly Progress Notes (Q4):

Year-End Summary: What was achieved? What carries forward?



TOOL 04

Team Career Development Plan

Purpose: Provide a team-level roadmap showing employees what they can achieve next, how to grow collectively, and how individual development aligns with team and organizational goals.

Step 1: Assess Team Skills and Current Roles

- Identify each team member's strengths, current skill levels, and potential growth areas.
- Map these against the career ladder and future role expectations.

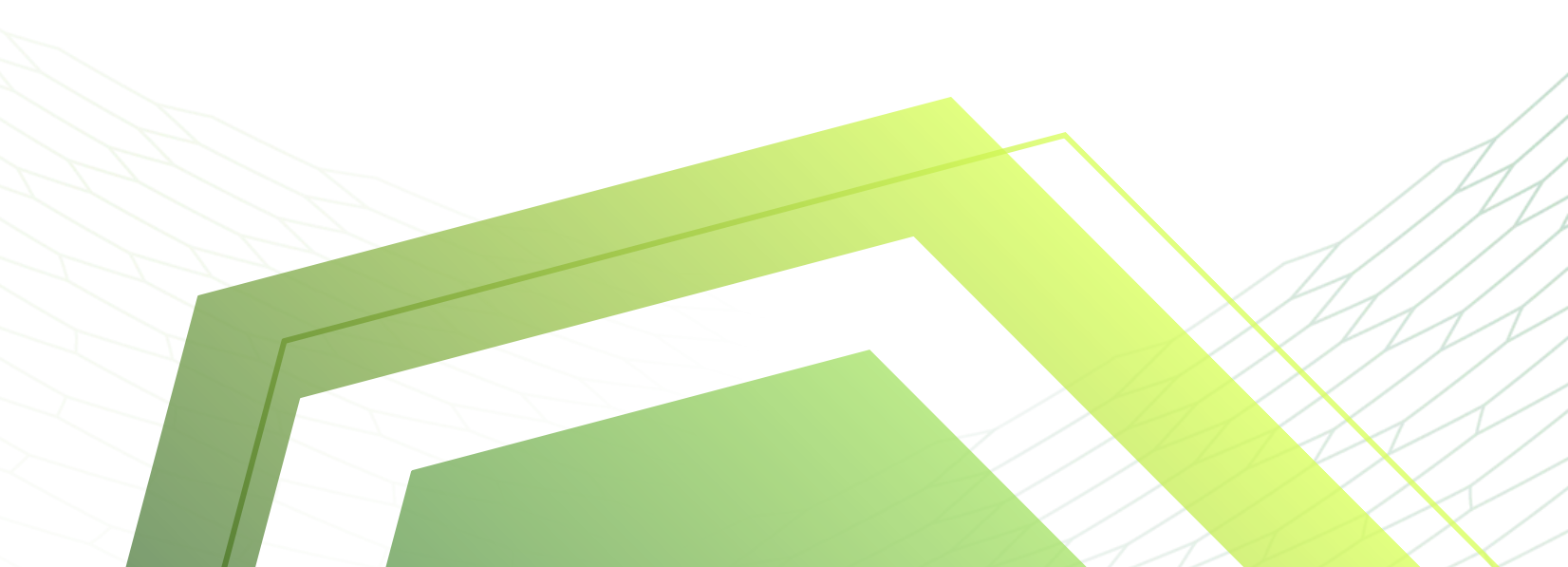
You may use the Atticus Leadership Competencies and Capability Benchmarking templates for this. The templates follow defined competencies and capabilities per level. Customize them to reflect what is valuable and applicable to your organization.

Team Skills Overview

Employee	Current Role / Level	Key Strengths	Development Areas	Target Role
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Step 2: Define Team Goals and Growth Opportunities

- Determine short-term and long-term team objectives.
- Highlight opportunities for stretch projects, cross-functional exposure, and leadership responsibilities.

Manager: If you are looking at developing this skill, this project provides a great opportunity to put it into practice. Let's make sure you are in the room for this one.

Step 3: Align Individual Aspirations With the Team Path

- During career discussions, link individual goals with team-level achievements.
- Show employees how their skill growth contributes to team success and prepares them for future roles.

Step 4: Encourage Collective Learning and Mentorship

- Promote knowledge-sharing, peer coaching, and mentorship within the team.
- Encourage collaboration on development initiatives to accelerate team growth.

Ideas for team-based learning:

- Mindful Mondays: team reflection or reading share.
- Brownbag Tuesdays: informal knowledge sharing sessions.
- Workshop Wednesdays: skill-building workshops led by team members.
- Idea Lab Thursdays: open forum for new ideas and problem-solving.
- Learning Circle Fridays: peer coaching and development check-ins.

Pair team members with more senior employees or leaders for coaching and mentoring sessions specific to individual development goals.



TOOL 05

Training and Development Considerations

Manager Responsibilities: recommend relevant skills development programs aligned with career growth objectives, ensure employees have access to internal and external learning opportunities, and monitor application of learning in daily work.

Types of Training to Consider

Training Type	What It Covers	Best For
Technical Skills	Job-specific tools or software, advanced competencies for expert-level performance	Employees building toward Principal or Solutions Architect level roles
Leadership and Management	Supervisory skills, team leadership, and strategic thinking	Employees identified as high-potential for management roles
Soft Skills	Presentation, negotiation, conflict resolution, and feedback delivery	All employees, especially those in client-facing or cross-functional roles
Culture and Inclusion	Team collaboration, company values, and cultural competencies	All employees, particularly new hires and those joining offshore teams
Cross-Functional Exposure	Project rotation, shadowing, or stretch assignments to broaden perspective	Employees preparing for senior or leadership roles

Types of Training to Consider

Employee	Training Type	Program / Activity	Start Date	Completion Date	Application in Role



FRAMEWORK 01

Leadership Potential Competencies

This framework outlines the Leadership Potential competency list and behavioral guideposts to help assess the leadership landscape and identify the future leaders of the organization.

How to Use This Framework

Step	Action
1	Identify the critical roles in the organization. These are leadership posts or specialized roles that have direct and significant impact on the direction, sustainability, and continuity of the business.
2	From 1 to 5, with 5 being the highest, identify the target level of competency for each role.
3	Assess leaders, potential successors, and high-potential and high-performing employees against the competencies set for their current and target (future) roles.
4	Use the results to understand where capable future leaders exist, where the leadership pool is weak, what competencies the organization is strong at, and what needs to be developed. Define an action plan to develop people to reach target competencies.

Leadership Levels: What Each Requires

Level	Focus
Managers and Senior Managers (Manager of Other Managers)	Oversee teams or departments, requiring strong leadership, advanced problem-solving, and the ability to align team objectives with organizational goals. Focus on optimizing processes, driving performance, and managing resources effectively.
Directors	Operate at a strategic level, shaping organizational vision, fostering cross-functional collaboration, and influencing key business decisions. Responsible for long-term planning, driving cultural change, and ensuring all support functions align with the overarching business strategy.





Competency Definitions and Behavioral Expectations

No.	Competency	Definition	Manager / Senior Manager	Director
1	Communication Skills	The ability to influence and effectively convey ideas, information, and feedback in both written and verbal form.	Leads presentations to larger groups and stakeholders. Manages communication during organizational changes or crises. Influences the right stakeholders. Navigates conflict to achieve win-win resolutions.	Shapes and articulates the strategic communication vision. Influences and negotiates with senior stakeholders and external partners.
2	Emotional Intelligence	The ability to be self-aware, understand, manage, and navigate both one's own emotions and those of others to foster productive relationships.	Guides teams through emotional and high-stress situations. Implements strategies to enhance team morale and cohesion.	Cultivates an emotionally intelligent organizational culture. Leads high-stakes negotiations and manages executive-level relationships.
3	Problem-Solving and Critical Thinking	The ability to analyze situations, break down problems, identify root causes, and design and implement practical solutions.	Approaches issues systematically and leads problem-solving initiatives across teams. Creates and implements corrective and long-term solutions with significant operational impact.	Approaches issues to identify strategic challenges and develops long-term solutions. Drives organizational change through advanced critical thinking.
4	Business Acumen	Understanding of business operations and the ability to apply that knowledge to decision-making and strategy.	Aligns team objectives with broader business goals. Makes decisions that positively impact the organization's financial health.	Shapes business strategy based on comprehensive market and financial analysis. Drives initiatives that enhance overall business performance.
5	Stakeholder Management	Building, maintaining, and influencing positive relationships with key stakeholders.	Strategically manages stakeholder relationships. Negotiates and resolves conflicts between different stakeholder interests.	Influences and engages with top-tier stakeholders including executives and external partners. Develops long-term strategies for stakeholder engagement.



Competency Definitions and Behavioral Expectations

No.	Competency	Definition	Manager / Senior Manager	Director
6	Data Literacy and Analytical Skills	The ability to understand, interpret, and act on data to drive decisions and strategies.	Analyzes complex datasets to drive strategic decisions. Integrates data-driven insights into team and departmental strategies.	Oversees organizational data strategies and governance. Utilizes advanced analytics to shape long-term business strategies.
7	Collaboration and Cross-Functional Teamwork	Working effectively with colleagues across different teams and departments.	Promotes a collaborative culture and breaks down silos. Coordinates large-scale projects involving multiple departments.	Drives strategic partnerships and alliances across and outside the organization. Fosters an environment of continuous collaboration and innovation.
8	Project and Risk Management	The ability to plan, execute, and manage projects to ensure timely and successful delivery.	Leads multiple projects, optimizing resource allocation and efficiency. Ensures projects deliver desired outcomes and align with strategic goals.	Oversees a portfolio of projects, aligning them with long-term business strategies. Implements project management frameworks and best practices across the organization.
9	Customer-Centric Mindset	Placing the customer, whether internal or external, at the center of decision-making and service delivery.	Implements customer-centric policies and practices across the organization. Measures and reports on customer satisfaction metrics.	Shapes the organization's customer-centric culture and strategy. Drives initiatives that significantly enhance overall customer satisfaction and loyalty.
10	Leadership and People Development	The ability to lead teams, inspire performance, and mentor others for growth and development.	Coaches and develops team members. Creates opportunities for the team to grow, aligning their growth with organizational needs. Leads by example.	Drives the development of leadership pipelines and succession planning. Shapes organizational culture and leads large-scale people development initiatives.



Competency Definitions and Behavioral Expectations

No.	Competency	Definition	Manager / Senior Manager	Director
11	Institutional Mindset	The ability to manifest a big picture understanding of the work and the business and translate it to clear implementation details.	Sets team goals in conjunction with other teams to ensure alignment across the organization and drive contributions to the organizational goal.	Envisions the future for the business and translates this into an achievable plan of action.
12	Execution	The ability to deliver on commitment. The will and resolve to get things done and move closer to a goal.	Demonstrates ability to deliver results and exceed expectations in spite of ambiguity and limited resources.	Transforms vision into an action plan and empowers the team and the organization to follow through and deliver, contributing to the achievement of organizational goals.





FRAMEWORK 02

Capability Benchmarking Template

Use this template to assess team members against their current career level requirements and the next level requirements. Conduct this assessment quarterly and use the results to drive IDP updates and promotion decisions.

Instructions

Step	Action
1	Fill out the necessary requirements (fields) for each career level based on business need. Examples are provided but should be updated to reflect your organization's specific needs.
2	Assess each team member against their respective level based on performance, skills, and contributions.
3	Conduct quarterly performance reviews to discuss career goals and development plans against current and next level requirements.
4	Employees who meet the criteria for the next career level may be eligible for promotion, depending on business need and available roles.

Capability Benchmarking Grid

Criteria	Consultant	Senior Consultant	Principal Consultant	Solutions Architect
Job Description				
Qualifications				
Behavioral Indicators	Works independently with minimal supervision. Leads major projects and collaborates with other teams. Coaches and mentors junior consultants.	Works independently. Leads high-stakes conversations and major projects. Has deep understanding of the business. Strong stakeholder management. Identifies opportunities to create business value for clients.	Identifies risks and opportunities and creates strategies to create business value for clients. Identifies and influences the right stakeholders for win-win outcomes. Strong business acumen. Translates vision to actionable next steps.	All Principal Consultant behaviors, plus: strong collaboration across different units and levels, coaches and mentors other team members, shares best practices and conducts training as needed.



Criteria	Consultant	Senior Consultant	Principal Consultant	Solutions Architect
Years of Experience	1 to 5 years	4 to 7 years	6 to 10 years	8 or more years
NetSuite Skills				
Assessment (Support vs Lead)				
Scoping				
Pre-Sales				
NetSuite Certification	NS Administrator, NS Financial, User/ERP Consultant or equivalent	NS Administrator, NS Financial, User/ERP Consultant or equivalent	NS Administrator, NS Financial, NS/User/ERP Consultant or equivalent, NS SuiteAnalytics	NS Administrator, NS Financial, NS/User/ERP Consultant or equivalent, NS SuiteAnalytics
Celigo Skills				
Celigo Certification		Level 2	Level 4	Level 4
Special Certifications			NS PBCS, NS AR, NS AW, CPQ	NS PBCS, NS AR, NS AW, CPQ





Capability Assessment Score Sheet

Use this to score each employee against the competencies for their current role and the next level. Rating scale: 1 (not yet demonstrated), 2 (developing), 3 (meets level), 4 (exceeds level), 5 (ready for next level).

Competency	Current Level Target	Employee Score	Next Level Target	Gap
Communication Skills				
Emotional Intelligence				
Problem-Solving and Critical Thinking				
Business Acumen				
Stakeholder Management				
Data Literacy				
Collaboration				
Project and Risk Management				
Customer-Centric Mindset				
Leadership and People Development				
Institutional Mindset				
Execution				

Overall Assessment Summary and Recommendation:



MANAGER GUIDE

Manager Actions and Guidance

Career development does not happen without intentional manager action. These are the things you need to do consistently, not just when it is review season.

What Managers Should Do Consistently

Action	When	Why It Matters
Create and update IDPs for each employee	Initiated at annual review, updated quarterly	Provides a documented development roadmap that employees can track and managers can reference.
Set annual and monthly goals collaboratively	Start of year, then monthly	Keeps development connected to performance expectations throughout the year.
Conduct quarterly career check-ins	Every quarter	Ensures the IDP stays relevant and reflects current aspirations and business needs.
Recognize achievements and milestones	Ongoing	Reinforces motivation and signals that growth is being noticed.
Use the team roadmap for stretch assignments	When planning projects or resource allocation	Connects day-to-day work to long-term development in a meaningful, practical way.
Identify high-potential employees	During talent reviews and annual calibration	Prepares the organization for succession and builds a leadership bench.
Document career conversations	After every career discussion	Creates a record that supports transparency, consistency, and defensible promotion decisions.



Manager Self-Check: Career Development

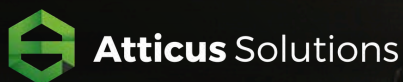
- Does every employee on my team have a current IDP?
- Have I had a dedicated career conversation with each employee in the past quarter?
- Do I know what each employee's short and long-term career goals are?
- Have I connected development goals to actual work assignments?
- Have I identified which employees are ready to grow into higher-level roles?
- Have I documented career discussions?
- Have I recognized growth and progress, not just performance?

Career development is one of the strongest retention levers a manager has. When employees see a path forward, they stay. When they do not, they leave, even if everything else is fine.



Quick Reference: Career Management Tools

Tool	When to Use
Individual Development Plan (IDP)	Initiated at annual review. Updated continuously in coaching sessions.
Team Career Development Plan	Built at the start of the year. Reviewed quarterly.
Training and Development Tracker	Ongoing. Updated when training is assigned and completed.
Leadership Potential Competencies	During talent reviews and calibration sessions.
Capability Benchmarking Template	Quarterly. Assess current level and readiness for the next level.
Capability Assessment Score Sheet	During talent reviews. Feeds into promotion and succession decisions.
Career and Performance Timeline	At the start of each year. Use to plan career conversations across the year.



MANAGER'S TOOLKIT | MODULE 07

Total Rewards and Compensation

Compensation, Benefits, and Rewards Conversations

Total Rewards discussions are not simply about salary. They communicate how much the organization values its people.



MODULE OVERVIEW



What's In This Module

This module equips managers with the cultural awareness, tools, and conversation frameworks to confidently lead Total Rewards discussions with Filipino employees. Rewards conversations should be transparent, culturally respectful, motivating, and aligned with both employee needs and business objectives.

Section	What It Covers
Why Total Rewards Conversations Matter	The three engagement drivers rewards address, and why this matters for Filipino teams.
Understanding Filipino Employee Motivations	What Filipino employees value most, and how rewards connect to their priorities.
Total Rewards Framework	The full scope of compensation, benefits, and recognition available to employees.
The Role of the Manager	What managers own in rewards conversations and when to involve HR.
How Managers Evaluate Total Rewards	A five-step process for gathering feedback, observing patterns, and adjusting programs.
Career Development and Rewards Integration	How development and rewards reinforce each other.
Manager Playbook for Rewards Conversations	A simple five-step framework for any rewards conversation.
Sample Conversations	Three fully scripted scenarios managers can adapt immediately.
Coaching Questions for Leaders	Reflection prompts for reviewing rewards with the team.

FOUNDATION

Why Total Rewards Conversations Matter

Total Rewards discussions communicate how much the organization values its people. For Filipino employees, relational recognition and family-oriented benefits are highly valued. Proactively discussing rewards reinforces psychological safety and shows that the organization cares.

Engagement Driver	What It Means for Filipino Employees
Security	Compensation and benefits support personal stability and family responsibilities. This is not just about the salary number. It is about whether the employee feels financially safe.
Recognition	Employees want to know their effort is seen and appreciated. In Filipino culture, being acknowledged matters as much as being compensated.
Belonging	Recognition and support reinforce their connection to the team and company. Employees who feel they belong stay longer and perform better.

When these three drivers are addressed well, employees feel secure, motivated, proud of their work, and committed to the organization.



Why This Matters for the Business

Total Rewards Outcome	Business Impact
Employee Retention	Employees who feel fairly compensated and recognized are more likely to stay. Total rewards reduce turnover risk by creating a sense of value and fostering belonging.
Employee Growth and Security	Rewards signal the organization's investment in the employee's career, health, and well-being. Clear benefits and recognition give employees confidence to focus on growth and take on new responsibilities.
Motivation and Engagement	When employees understand the full scope of rewards, they feel motivated and secure, which drives higher productivity and satisfaction.



CULTURAL FOUNDATION

Understanding Filipino Employee Motivations

For many Filipino professionals, work is closely tied to family stability, respect, and community belonging. Understanding what employees value allows managers to connect rewards to what actually matters to them.

What Filipino Employees Value	What This Means for Rewards
Family Security	Healthcare coverage, maternity and paternity leave, dependent support, and financial stability are among the most valued rewards. These are not just benefits. They are signals of care.
Recognition and Appreciation	Verbal acknowledgement, team recognition, and celebration of milestones carry significant emotional weight. In many cases, recognition matters as much as a bonus.
Career Progression	Visible growth opportunities, skill development, and promotion pathways motivate employees to perform and stay. Career conversations are rewards conversations.
Respectful Leadership	Leaders who listen, fairness and transparency, and relational rather than purely transactional management. How a manager leads is itself a form of reward.

How Rewards Support Employee Growth

- Access to learning and development programs tied to rewards motivates skill-building and career progression.
- Transparent communication about compensation and benefits empowers employees to make informed career and personal growth decisions.
- Recognition and feedback encourage continued high performance and confidence in contributions.

In Filipino teams, recognition often carries equal emotional impact as financial rewards. A simple acknowledgement like 'We really appreciate the work you put into this project' can significantly boost engagement.





FRAMEWORK

Total Rewards Framework

Managers should understand the full scope of rewards available to employees. Total Rewards goes well beyond salary. When employees understand the full picture, their perception of value increases significantly.

Rewards Category	What It Includes
Compensation	Base salary, bonuses and incentives.
Government Benefits (Philippines)	SSS (Social Security System), PhilHealth, Pag-IBIG housing fund, maternity and paternity leave, Violence Against Women and Children leave, Magna Carta leave, Single Parent leave.
Health and Well-Being	HMO coverage, wellness initiatives.
Time Off	Leave entitlements, flexibility when possible.
Recognition	Performance recognition, milestone celebrations such as work anniversaries, core values recognition.
Career Growth	Training programs, mentorship, career progression opportunities.
Work-Life Balance	Flexible arrangements when possible, team culture and celebrations.

Helping Employees Understand the Full Picture

Many employees focus only on base salary when thinking about compensation. Managers can shift this perspective by walking employees through the full rewards picture during onboarding, annual reviews, or any rewards conversation.

Sample framing for a total rewards conversation:

Manager: I want to make sure you have a clear picture of everything available to you here. Your total rewards go beyond your salary. Let me walk you through what is included.

Manager: On the government benefits side, you have SSS, PhilHealth, Pag-IBIG, and your statutory leaves including maternity and paternity. On the health side, you have HMO coverage. On top of that, there are programs for learning and development, career progression, and recognition. All of this is part of what the organization is investing in you.



MANAGER ROLE

The Role of the Manager in Total Rewards

Managers are not expected to know every HR policy. They play a key role in helping employees understand and appreciate their rewards. The manager is the bridge between the organization's rewards programs and the employee's lived experience of them.

Manager Responsibility	What It Looks Like in Practice
Initiate rewards discussions proactively	Do not wait for employees to ask. Bring it up during 1:1s, check-ins, and annual reviews.
Observe participation, energy, and morale	Watch for signals that rewards may not be landing well: disengagement, recurring questions about pay, reduced motivation.
Highlight available benefits and encourage usage	Employees often do not use benefits they do not know about. Remind them regularly.
Connect rewards to performance and development	Make the link explicit. Show employees how their growth leads to recognition and reward.
Escalate complex questions to HR	You do not need to know everything. Know when to involve HR and do it quickly.

In Filipino teams, recognition often carries equal emotional impact as financial rewards. Simple acknowledgements build engagement just as powerfully as salary increases. Use them consistently.





TOOL 01

How Managers Evaluate Total Rewards

Use 1:1 meetings and team discussions to understand how employees perceive their rewards. Make this a regular part of your conversations, not a one-off exercise.

Step 1: Gather Employee Feedback

- Clearly outline roles, responsibilities, and expectations for each career stage (for example: Consultant, Senior Consultant, Principal Consultant, Solutions Architect).
- Identify requirements for each level: technical skills and leadership behaviors and competencies.
- Highlight skills needed to transition from current performance levels to higher-impact roles.

Questions to ask during rewards feedback conversations:

Manager: Which benefits have been most valuable to you recently?

Manager: Is there anything that would make your work or life easier that we do not currently offer?

Manager: Are there rewards or programs you wish we had?

Manager: Do you feel the recognition you receive reflects the effort you put in?





Step 2: Observe Patterns and Insights

Not all feedback comes from direct conversation.
Pay attention to behavioral signals.

Signal to Watch For	What It May Indicate
Declining engagement or participation	Employees may feel undervalued or unseen.
Low utilization of available benefits	Employees may not know what is available, or the benefits do not meet their needs.
Recurring questions about compensation	There may be a transparency gap. Employees are seeking information they should already have.
Reduced morale during busy or high-pressure periods	The recognition and support mechanisms may not be strong enough to sustain motivation under pressure.

Step 3: Align With Market and Business Needs

- Compare programs against market benchmarks for salary and benefits.
- Ensure alignment with company values and culture.
- Rewards should remain aligned with company performance, not just individual performance.
- Identify gaps between what employees need and what is currently available.





Step 4: Adjust and Communicate

When rewards programs change, clear communication is critical. Employees need to understand what is changing, why, and what it means for them.

Communication Principle	What to Do
Explain the intent behind changes	Tell employees why the change is being made. Employees who understand the reason are more accepting of change.
Reinforce fairness and transparency	Be clear about what is changing and what is staying the same. Ambiguity breeds anxiety.
Acknowledge employee contributions	When making changes, recognize the team's work. Changes that come without acknowledgment feel transactional.

Under Philippine labor law, removing an existing benefit that employees have regularly received may violate the non-diminution of benefits rule. HR should always be consulted before any changes are made to existing benefits.





Step 5: Document and Follow Up

- Record discussion outcomes and action items.
- Monitor effectiveness in future 1:1s and engagement check-ins.
- Repeat the evaluation cycle annually to maintain market competitiveness.

Total Rewards Evaluation Tracker

Employee	Feedback Gathered	Key Themes	Actions Agreed	Follow-Up Date





INTEGRATION

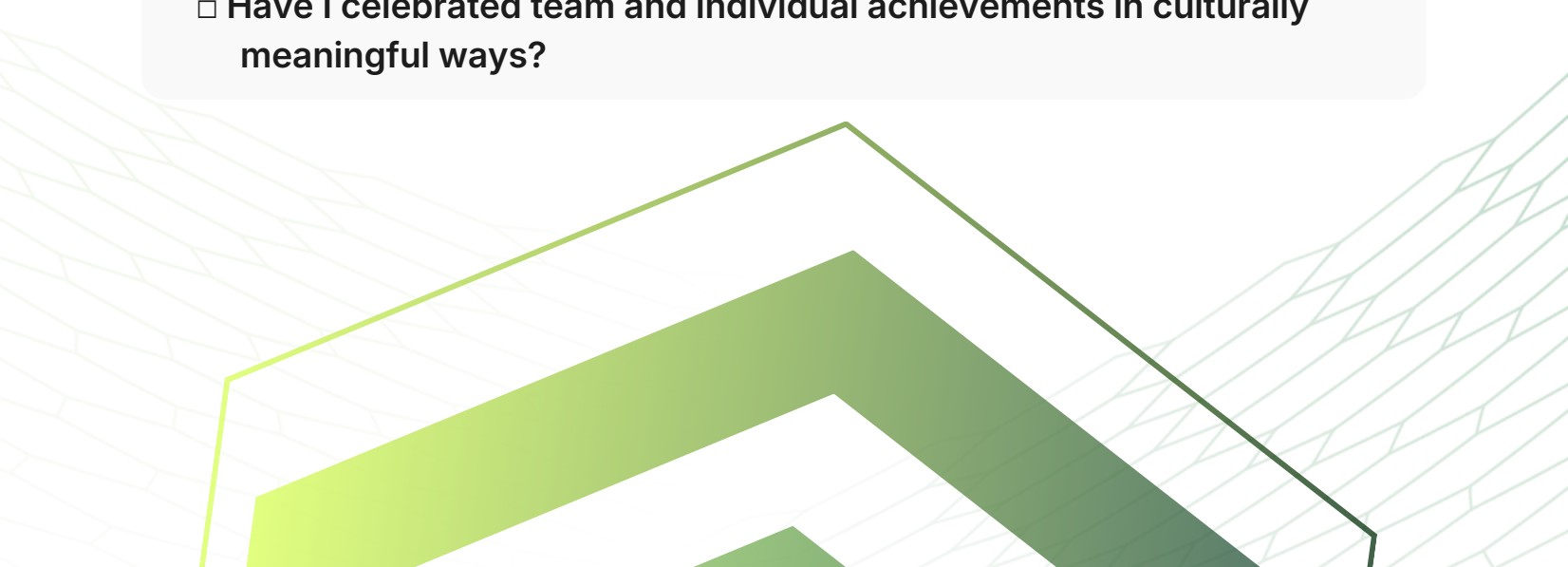
Career Development and Total Rewards Integration

Career development and rewards are most effective when they are connected. Employees who see how their growth leads to recognition and reward are more motivated to develop and more likely to stay.

Integration Principle	What It Means
Development Drives Rewards	Employees who grow their skills and deliver strong results are recognized and rewarded. Growth leads to opportunity.
Rewards Reinforce Development	Recognition motivates employees to pursue growth opportunities. Being rewarded for progress signals that development is valued.
Continuous Alignment	Quarterly coaching, career conversations, and performance reviews ensure that employees see how their effort leads to opportunity.

Manager Checklist: Career and Rewards Alignment

- Have I conducted quarterly coaching and career check-ins for every employee?
- Are IDPs current for every employee on my team?
- Am I tracking performance and engagement metrics to guide rewards conversations?
- Have I communicated total rewards clearly during the most recent annual review or career discussion?
- Have I celebrated team and individual achievements in culturally meaningful ways?





Career and Rewards Dashboard

Managers can maintain a simple dashboard to track rewards proactively rather than reactively. This connects individual contributions to business objectives and ensures nothing gets missed.

Employee	Performance Rating	IDP Status	Last Salary Review	Last Recognition	Next Review Date





TOOL 02

Manager Playbook for Total Rewards Conversations

Use this five-step framework for any rewards conversation, whether it is a salary question, a benefits query, or a recognition moment.

Step	What You Do	Why It Works
1. Acknowledge the Question	Show openness and appreciation. Do not deflect or minimize.	Employees need to feel safe raising rewards questions. Acknowledgment signals that it is welcome.
2. Provide Guidance	Share available information clearly and honestly.	Transparency builds trust. Employees who understand the system are less anxious about it.
3. Connect to Growth	Explain how rewards relate to performance and development.	This reinforces that rewards are earned and linked to real behaviors, not arbitrary.
4. Escalate When Needed	Partner with HR for complex or policy-specific questions.	Managers do not need to know everything. Knowing when to involve HR is itself a skill.
5. Follow Up	Ensure employees receive answers or support within a reasonable timeframe.	Following through builds credibility. Employees remember when their questions were addressed.





TOOL 03

Sample Rewards Conversations

Use these as starting points. Adapt the language to your relationship and context.

Scenario 1: Employee Asks About Salary Growth

Employee: *I am wondering what I need to do to increase my compensation here.*

Manager: *That is a great question and I am glad you brought it up. Your growth here is important to us. Compensation adjustments are typically connected to performance, skill development, and role progression. Let's review your current goals and identify the steps that can position you for that next level. I will also coordinate with HR to make sure you have clear visibility on the process.*

Why this works

It acknowledges the question, reinforces growth, and provides clarity without over-promising.

Scenario 2: Employee Is Unsure About Benefits

Employee: *I am not sure what benefits I am eligible for.*

Manager: *That is a great thing to clarify. Our total rewards include salary, government benefits, healthcare coverage, leave programs, and recognition programs. Some of these also extend to dependents, which many team members appreciate. Let's walk through what is available to you, and I will connect you with HR for detailed guidance.*



Scenario 3: Recognizing an Employee's Contributions

Manager: *I want to recognize the effort you put into the recent project. The quality and dedication you showed really stood out. Contributions like this are exactly what we look for when considering growth opportunities and recognition.*

Why this works

Recognition like this reinforces motivation and cultural appreciation. It connects effort to future reward, which is the link employees need to see.

Scenario 4: Proactively Opening a Rewards Conversation

Manager: *I wanted to take a few minutes to check in on how you are feeling about your total rewards here. We do not talk about this enough and I want to make sure you feel informed and valued. Is there anything about your compensation, benefits, or recognition that you want to discuss or that feels unclear?*

Scenario 5: Communicating a Rewards Change

Manager: *I want to give you a heads-up about a change to [specific program]. Here is what is changing and why: [explanation]. I want to be transparent that this decision was made at the organizational level, and I want to make sure you have all the information you need. If you have questions or concerns, I am happy to discuss them and I can also connect you with HR for more detail.*





TOOL 04

Coaching Questions for Leaders

Use these reflection questions when reviewing rewards with your team. Run through them before annual reviews, during engagement check-ins, and whenever you sense a disconnect between effort and morale.

Employee Understanding

- Do employees clearly understand what is in their total rewards package?
- Are available benefits being utilized?
- Have I walked new employees through the full rewards picture during onboarding?

Motivation

- What motivates each team member? Is my recognition approach aligned with that?
- Is recognition happening frequently enough, not just during formal review cycles?
- Am I recognizing both professional achievements and personal milestones?

Retention

- Are there signs of disengagement that may be linked to rewards dissatisfaction?
- Are employees seeing career growth opportunities?
- Have I asked employees directly whether they feel fairly recognized and compensated?

Cultural Anchors for Rewards Conversations

Cultural Anchor	What It Means for Rewards
Family-Oriented Support	Programs supporting dependents and well-being have the strongest emotional impact. Lead with these when walking employees through total rewards.
Recognition	Frequent acknowledgment motivates teams. Do not save recognition for big moments. Small, consistent acknowledgments build the foundation.
Transparency	Clear communication builds trust. Employees who understand their rewards are more secure and more engaged.
Relational Leadership	Respectful conversations strengthen engagement. How you have the conversation matters as much as what is in the rewards package.



Final Outcome

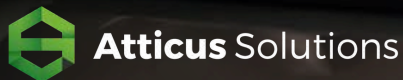
When rewards conversations are proactive and culturally aligned:

- Managers gain credibility.
- Employees feel valued and supported.
- Teams remain motivated and engaged.

Most importantly, organizations build loyal, high-performing offshore teams that grow with the business.



[BACK TO HOME](#)



MANAGER'S TOOLKIT | MODULE 08

Employee Relations & Labor Management

Philippines Context | Manager Guide

Philippine labor law is highly procedural. Managerial intent alone is insufficient. Compliance is determined by documentation, fairness, and strict adherence to due process.





What's In This Module

This module equips managers with the knowledge, principles, and practical tools to handle employee relations correctly in the Philippines. Every section in this module has legal implications. Follow the guidance closely and involve HR early for any complex situation.

Section	What It Covers
Overview	What Employee Relations means in the Philippine context.
Why Effective ER Matters	The organizational and legal case for getting this right.
Managerial Responsibilities	What managers own in ER, and what HR owns.
The 8 Operating Principles	The non-negotiable rules that govern every ER decision.
Principle Deep Dives	Must Practice and Must Not Practice guidance for each principle.
Impact on the Employee-Manager Relationship	How consistent ER practice strengthens trust and authority.
ER Documentation Guide	What to document, when, and how.
Incident Report Template	A structured form for documenting workplace incidents.
Discipline Progression Guide	How to escalate discipline correctly and proportionately.
Manager Self-Check	A pre-action checklist before taking any ER step.



Overview

Employee Relations (ER) and Labor Management refer to the structured, consistent, and legally compliant manner in which managers address employee performance, behavior, attendance, discipline, and separation.

In the Philippine context, Employee Relations is shaped by three key realities:

Reality	What It Means for Managers
Strong statutory protection for employees	Philippine law heavily favors employees in disputes. Managers who act without proper process are exposed, even if the underlying concern is valid.
Mandatory procedural due process requirements	Intent is not enough. Every disciplinary action requires specific written notices, timelines, and responses. Skipping steps invalidates the action.
Active regulatory oversight by DOLE	The Department of Labor and Employment actively oversees labor disputes. Non-compliant employers face reinstatement orders, backpay liabilities, and reputational damage.

There is no at-will termination in the Philippines. Every separation, suspension, or serious disciplinary action requires proper process, documentation, and compliance. Managerial intent alone is insufficient.





WHY IT MATTERS

Why Effective Employee Relations Matter

A well-managed Employee Relations framework helps organizations minimize exposure to labor complaints and legal risks, ensure fairness and consistency in policy implementation, prevent minor issues from escalating into serious disputes, maintain employee morale and workplace harmony, and preserve managerial credibility and authority.

Proper ER practices protect both the organization and its leaders.

When ER Is Handled Well

When ER Is Handled Poorly

Issues are resolved at the managerial level

Issues escalate to HR, DOLE, or formal arbitration

Employees trust that decisions are fair

Employees feel targeted, inconsistently treated, or disrespected

Documentation supports every decision

Undocumented actions are treated as non-existent in labor proceedings

Managers exercise authority confidently

Managers are seen as arbitrary or punitive

The organization is protected from legal liability

The organization faces reinstatement orders, backpay, and reputational damage





MANAGER ROLE

Managerial Responsibilities in Employee Relations

Managers are expected to identify and address employee concerns promptly, apply company policies consistently and objectively, observe all procedural due process requirements, coordinate closely with Human Resources, and maintain accurate, complete, and factual documentation.

Effective management requires balancing firmness with fairness, and compassion with compliance.

Manager Owns	HR Owns
Day-to-day performance and behavior management	Policy interpretation and legal compliance guidance
Early coaching and feedback before escalation	Administrative hearing facilitation
Incident documentation and reporting	Formal notices (NTE, Notice of Decision)
Implementing progressive discipline steps	Complex cases, suspensions, and terminations
Communicating expectations clearly and consistently	DOLE coordination and external reporting

Managers should involve HR early in any situation that may involve formal discipline, suspension, or termination. Do not wait until the situation escalates. Early coordination protects both the manager and the organization.



CORE FRAMEWORK

The 8 Operating Principles

These eight principles govern every Employee Relations decision. They are not guidelines. They are non-negotiable requirements that protect the organization, the employee, and the manager.

Principle	The One-Line Rule
1. No Action Without Due Process	No suspension, termination, or serious disciplinary action without proper written notices and procedural compliance.
2. Same Case, Same Treatment	Identical violations must result in comparable penalties. Consistency strengthens legal defensibility.
3. Correct First, Punish Last	The law expects employers to attempt corrective action before termination.
4. Decisions Must Be Evidence-Based	The burden of proof lies with the employer. If it is not documented, it is difficult to defend.
5. Discipline Must Be Proportionate	Penalties must match the severity, frequency, and prior history of the offense.
6. Documentation Is a Legal Requirement	Undocumented actions are treated as non-existent in labor disputes.
7. Respect and Dignity Are Non-Negotiable	Humiliating or public discipline weakens employer defense and damages morale.
8. Management Authority Is Regulated	Business decisions are permitted but regulated under labor law.





PRINCIPLES IN DEPTH

Principle Deep Dives

Principle 1: No Action Without Due Process

No suspension, termination, or serious disciplinary action may occur without proper written notices and procedural compliance. There is no at-will termination in the Philippines.

Must Practice	Must Not Practice
<ul style="list-style-type: none">• Issue a Notice to Explain (NTE) before imposing discipline.• Allow the employee to respond in writing.• Conduct an Administrative Hearing for suspension and termination cases.• Issue a formal Notice of Decision.	<ul style="list-style-type: none">• Terminate at will.• Assume resignation due to absence.• Skip procedural steps due to urgency or business pressure.• Rely solely on verbal explanations.

The Twin Notice Rule for termination: (1) First Notice: Notice to Explain (NTE) stating the charge. (2) Second Notice: Notice of Decision after the hearing. Both notices are mandatory. Missing either one may invalidate the action.





Principle 2: Same Case, Same Treatment

Identical violations must result in comparable penalties. Any deviation must be properly documented and justified.

Must Practice	Must Not Practice
<ul style="list-style-type: none">• Review how similar cases were previously handled.• Align penalties with precedent and the Code of Conduct.	<ul style="list-style-type: none">• Apply inconsistent standards across teams.• Discipline selectively based on personal impression.

Consistency strengthens legal defensibility. If two employees commit the same violation and receive different penalties, the inconsistency can be used against the organization in a labor dispute.

Principle 3: Correct First, Punish Last

The law expects employers to attempt corrective action before termination. Termination must be demonstrably necessary and proportionate.

Must Practice	Must Not Practice
<ul style="list-style-type: none">• Provide coaching or implement a PIP for performance issues.• Document improvement opportunities provided to the employee.	<ul style="list-style-type: none">• Use discipline as the first response to non-grave issues.• Treat PIPs as exit strategies or tools to build a case for termination.





Principle 4: Decisions Must Be Evidence-Based

The burden of proof lies with the employer. Subjective impressions are insufficient in labor proceedings.

Must Practice	Must Not Practice
<ul style="list-style-type: none"> • Prepare Incident Reports (IRs) for every significant event. • Retain written records, emails, logs, and warnings. 	<ul style="list-style-type: none"> • Rely on verbal recollection in formal proceedings. • Base action on assumptions or personal impressions.

If it was not documented, it is difficult to defend. This applies to every coaching conversation, every verbal warning, and every formal action.

Principle 5: Discipline Must Be Proportionate and Progressive

Penalties must match the severity, frequency, and prior history of the offense.

Discipline Level	When to Apply
Verbal Warning	First instance of a minor offense, documented in writing.
Written Warning	Repeat minor offense or a moderate violation.
Final Warning	Repeat offense after written warning, or a significant violation.
Suspension	Serious violation, or repeated offense after final warning. Requires NTE and hearing.
Termination	Grave misconduct, or persistent non-improvement after all progressive steps. Requires full due process.





Must Practice	Must Not Practice
<ul style="list-style-type: none">• Escalate discipline step-by-step unless the offense is grave.• Justify any skipped levels in coordination with HR.	<ul style="list-style-type: none">• Jump directly to termination for minor issues.• Skip discipline steps due to convenience or impatience.

Principle 6: Documentation Is a Legal Requirement

Undocumented actions are treated as non-existent in labor disputes. Documentation is both a compliance tool and a protection mechanism.

Must Practice	Must Not Practice
<ul style="list-style-type: none">• Submit all administrative case records to HR.• Ensure documents are factual, complete, and properly dated.	<ul style="list-style-type: none">• Keep informal disciplinary actions undocumented.• Backdate or alter records under any circumstances.

Principle 7: Respect and Dignity Are Enforceable Expectations

Humiliating or public discipline weakens employer defense and damages morale. In Filipino culture, dignity and face-saving are especially significant. Public correction can cause lasting damage to the employee-manager relationship and team trust.

Must Practice	Must Not Practice
<ul style="list-style-type: none">• Conduct all corrective discussions privately.• Use professional, neutral, and factual language.	<ul style="list-style-type: none">• Publicly reprimand or shame employees in front of peers.• Use threatening, emotional, or accusatory language.



Principle 8: Management Authority Is Regulated

Business decisions are permitted but regulated under labor law. Managers cannot act unilaterally on redundancies, layoffs, or terminations without following government notice requirements.

Must Practice	Must Not Practice
<ul style="list-style-type: none">• Coordinate with HR for redundancies, layoffs, and terminations.• Follow all government notice requirements.	<ul style="list-style-type: none">• Announce layoffs independently without HR involvement.• Make verbal promises regarding separation pay or exit terms.

Authority must always be exercised within legal boundaries. When in doubt, involve HR before acting. It is always easier to course-correct before an action than after.





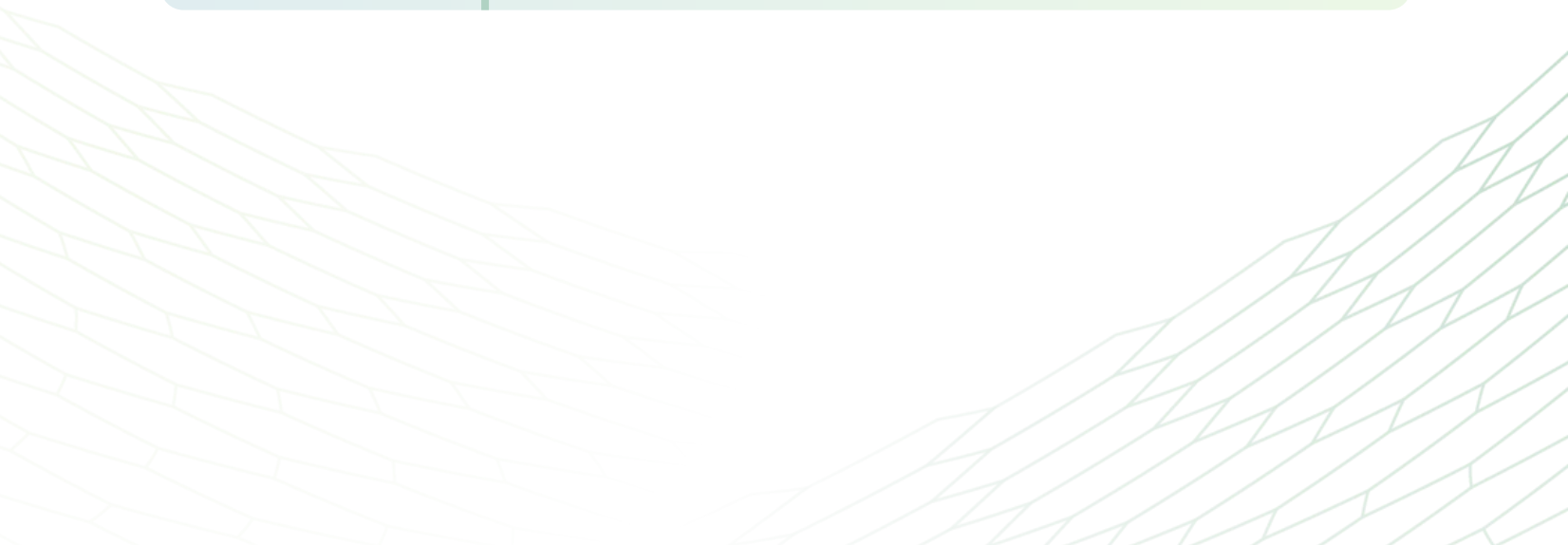
IMPACT

Impact on the Employee-Manager Relationship

When Employee Relations principles are consistently applied, the employee-manager relationship is strengthened across six dimensions.

Dimension	What Consistent ER Achieves
Increased Trust and Credibility	Employees gain confidence that managers act fairly and objectively, base decisions on facts and due process, and apply rules consistently.
Clear Expectations and Accountability	Structured processes clarify what is expected, how performance and behavior are evaluated, and what consequences apply for non-compliance.
Improved Communication and Openness	Formal mechanisms promote two-way communication, give employees opportunities to be heard, and encourage constructive dialogue rather than confrontation.
Perception of Fairness and Respect	Consistent adherence to due process reinforces that employees are treated with dignity, decisions are not arbitrary, and cultural sensitivities are acknowledged.
Reduced Conflict and Escalation	When managers address issues early and follow procedure, disputes are resolved at the managerial level and formal grievances are minimized.
Strengthened Managerial Authority	Managers who follow structured ER principles exercise authority confidently and legitimately, and are viewed as fair enforcers rather than punitive figures.

Manager Tip	In the Philippines, Employee Relations is a legal and managerial discipline. Fairness builds trust. Documentation builds protection. Due process builds defensibility. When consistently applied, these principles create a stable, respectful, and compliant workplace.
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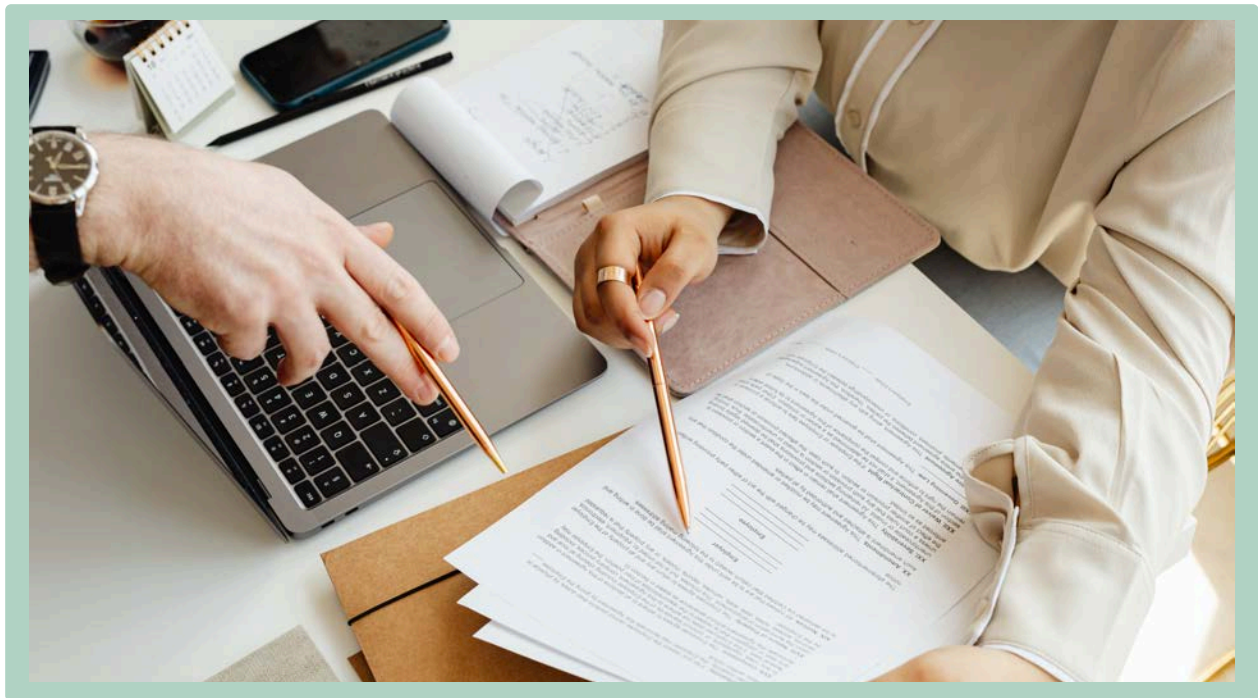




TOOL 01

ER Documentation Guide

Every Employee Relations action requires documentation. This guide covers what to document, when, and what format to use.



Document Type	When to Use	What to Include
Coaching Notes	After any coaching conversation where performance or behavior is discussed	Date, employee name, topic discussed, agreed actions, follow-up date. Keep it brief and factual.
Verbal Warning Record	When issuing a verbal warning for a first minor offense	Date, violation description, warning issued, employee acknowledgment, manager signature.
Incident Report (IR)	When a workplace incident occurs that may require formal action	Date and time, description of what happened, who was involved, witness details, evidence attached.
Notice to Explain (NTE)	Before imposing any formal discipline	Specific charge, factual basis, deadline for written response (minimum 5 days).
Employee Written Explanation	Employee's response to the NTE	Retained as part of the administrative case file. Never discarded.



Document Type	When to Use	What to Include
Administrative Hearing Notes	During the hearing for suspension or termination cases	Attendees, key statements, evidence presented, outcome.
Notice of Decision	After the administrative hearing	Penalty imposed, factual and legal basis, effective date.
PIP Documentation	Throughout the Performance Improvement Plan process	Goals, timelines, check-in notes, midpoint assessment, final outcome.





TOOL 02

Incident Report Template

Use this template to document any workplace incident that may require formal action. Complete it as soon as possible after the incident. Facts fade. Document while the details are fresh.

Date of Incident:

Time of Incident:

Location:

Manager Completing This Report:

Employee(s) Involved:

Description of the Incident (factual, observable, specific):

Witnesses (if any):





Evidence Available (emails, logs, screenshots, etc.):

Immediate Actions Taken:

Recommended Next Step (coaching, NTE, escalation to HR):

Date Submitted to HR:





TOOL 03

Discipline Progression Guide

Use this guide to determine the correct discipline level for a given offense. Always check with HR before escalating beyond a verbal warning. Consistency across similar cases is a legal requirement.



Standard Progression for Non-Grave Offenses

Step	Action	Required Documentation	HR Involvement
1	Coaching conversation	Brief coaching note with agreed actions and follow-up date	Not required, but recommended for pattern tracking
2	Verbal Warning	Verbal warning record signed by manager. Copy to HR.	Notify HR
3	Written Warning	Formal written warning with specific violation, evidence, and improvement expectations.	Coordinate with HR before issuing
4	Final Warning	Formal final warning with clear consequence statement if behavior continues.	Coordinate with HR before issuing
5	Suspension	NTE, employee response, administrative hearing, Notice of Decision.	HR must be involved. Do not proceed without HR.
6	Termination	Full Twin Notice process. NTE, hearing, Notice of Decision with legal basis.	HR must lead. Manager provides evidence and documentation.



For Grave Offenses

Grave offenses such as serious misconduct, fraud, willful disobedience, gross neglect of duty, or commission of a crime may allow skipping earlier discipline steps. However, the Twin Notice Rule still applies. Coordinate with HR immediately for any grave offense.

Never communicate a termination decision without HR involvement. Never make verbal promises about separation pay or exit terms. Both expose the organization to significant legal and financial risk.





MANAGER SELF-CHECK

Manager Self-Check Before Taking ER Action

Run through this checklist before taking any formal Employee Relations step. If you cannot check all boxes, stop and involve HR before proceeding.

Before Any Disciplinary Action

- Have I documented the performance or behavior concern with specific, observable evidence?
- Have I checked how similar cases were handled previously to ensure consistency?
- Have I provided coaching or a PIP before escalating to formal discipline?
- Have I consulted HR before issuing any formal notice?
- Is the proposed penalty proportionate to the offense and consistent with the Code of Conduct?

Before Issuing a Notice to Explain

- Is the charge specific, factual, and based on documented evidence?
- Have I given the employee adequate time to respond (minimum 5 days)?
- Have I coordinated with HR on the wording and process?

Before Conducting an Administrative Hearing

- Has the employee received and acknowledged the NTE?
- Has the employee been given the opportunity to submit a written explanation?
- Is HR present or informed?
- Am I prepared to document the hearing outcomes?

Before Any Separation

- Has HR reviewed and approved the separation type and process?
- Has all documentation been completed and submitted to HR?
- Have DOLE notification requirements been assessed (if applicable)?
- Has an internal communication plan been prepared?
- Have I avoided any verbal promises about final pay or separation terms?



Manager Tip

Compliance protects you legally. Respectful handling protects your employer brand. Documentation protects your decision. All three matter equally in the Philippines.

Quick Reference: Key ER Terms

Term	What It Means
NTE (Notice to Explain)	A written notice informing the employee of the specific charge against them, with a deadline to submit a written explanation. Required before any formal discipline.
Administrative Hearing	A formal process giving the employee the opportunity to be heard before a decision is made. Required for suspension and termination cases.
Notice of Decision	The final written decision issued after the hearing, stating the penalty and its basis. The second notice in the Twin Notice Rule.
Twin Notice Rule	The mandatory two-notice process for termination: NTE first, Notice of Decision second. Missing either notice may invalidate the termination.
Progressive Discipline	The step-by-step escalation of penalties from verbal warning to termination. Required for non-grave offenses.
Non-Diminution of Benefits Rule	Philippine law that prevents employers from removing or reducing benefits that employees have regularly received. HR must be consulted before any benefit is changed.
DOLE	Department of Labor and Employment. The Philippine government agency that oversees labor law compliance. Must be notified for authorized cause separations.
Just Cause	Employee-related grounds for termination: serious misconduct, fraud, willful disobedience, gross neglect, commission of a crime. Full Twin Notice process required.
Authorized Cause	Business-related grounds for termination: redundancy, retrenchment, closure, installation of labor-saving devices. 30-day written notice to employee and DOLE required.



MANAGER'S TOOLKIT | MODULE 09

Offboarding in the Philippines

A Structured and Compliant Approach to Employee Separations

Philippine labor law is employee-protective and highly procedural. Proper classification, documentation, and strict adherence to due process are critical to minimizing legal and reputational risk.



MODULE OVERVIEW



What's In This Module

This module gives managers a structured and legally compliant approach to offboarding employees in the Philippines. Every separation type has different requirements. Every step has legal consequences. This module makes sure you do it right.

Section	What It Covers
Quick Start Guide	The five things every manager must do before initiating any separation.
Types of Separation	Voluntary resignation, fixed-term contracts, authorized cause, and just cause, with requirements for each.
Manager Responsibilities	What managers own in offboarding, and what HR owns.
Financial and Compliance Considerations	Final pay inclusions, the clearance process, and legal timelines.
Cultural Impact	How offboarding affects the departing employee and the remaining team in a Filipino context.
Offboarding Conversation Framework	How to conduct the offboarding discussion with professionalism and empathy.
Sample Conversation Scripts	Fully scripted examples for each separation type.
Knowledge Transfer Guide	How to capture institutional knowledge and protect operational continuity.
Internal Communication Template	How to communicate a departure to the remaining team.
Clearance Tracker	A step-by-step tracker for completing the clearance process.

QUICK START

Quick Start Guide for Managers

Before initiating any separation, run through these five steps. Do not skip any of them.



Intent alone is not sufficient. Process determines compliance. A well-intentioned separation handled without proper process may result in reinstatement orders, backpay liabilities, and legal disputes.

Step	Action	Why It Matters
1	Do not communicate termination independently.	Any communication before HR alignment creates legal exposure. The employee must hear the correct information, in the correct way, at the correct time.
2	Consult HR immediately.	HR determines the correct separation type, the required process, and the documentation needed. Early coordination prevents costly mistakes.
3	Identify the correct separation type.	Each separation type has different legal requirements, timelines, and financial obligations. Getting this wrong exposes the organization to liability.
4	Ensure documentation is complete, factual, and objective.	Documentation is the foundation of every defensible separation decision. If it is not documented, it is difficult to defend.
5	Understand compliance requirements and required timelines.	Late notices, missing documents, or skipped steps can invalidate the action regardless of its merit.

SEPARATION TYPES

Types of Separation

Each separation type has distinct legal requirements. Correctly classifying the separation is the first and most important step. Involve HR before communicating anything to the employee.

A. Voluntary Resignation

Requirement	Detail
Notice period	Generally at least 30 days written notice, unless the contract specifies otherwise.
Manager action	Acknowledge receipt of the resignation in writing immediately. Do not delay.
Transition planning	Begin knowledge transfer and handover planning as soon as the resignation is received.
Separation pay	Not required unless contractually agreed or if the resignation is due to employer fault.

Sample acknowledgment language:

Manager: *Thank you for informing me of your decision. I acknowledge receipt of your resignation effective [date]. We will begin the transition process and HR will be in touch to guide you through the offboarding steps. I appreciate the work you have contributed to the team.*





B. End of Fixed-Term Contract

Requirement	Detail
Contract end date	Employment ends on the agreed contract end date. Atticus issues the End of Fixed-Term Contract notice to the hosted employee.
Termination process	No termination process is required if the contract is valid and properly structured.
Preparation	Final pay and documentation should be prepared in advance of the end date.
Key risk	If the employee was allowed to continue working beyond the contract end date without a new contract, they may be considered regularized. Coordinate with HR before the contract expires.

If the employee continues working after the contract end date without a new agreement in place, this may create an implied regular employment relationship. Coordinate with HR before the contract expires to prevent this.





C. Employer-Initiated: Authorized Causes

Authorized causes include: Redundancy, Retrenchment, Closure, Installation of Labor-Saving Devices.

Requirement	Detail
Written notice timeline	At least 30 days prior to effectivity, in writing, to both the employee and DOLE. DOLE notification is handled by Atticus Solutions HR.
Notice period pay	The 30-day notice period is considered paid.
Separation pay	Mandatory for employees under full-time engagement. Amount depends on the cause.
Documentation	Must clearly justify the business necessity. Vague justifications are challenged in labor disputes.

Authorized Cause	Separation Pay Required
Redundancy	One month pay per year of service (or one month pay, whichever is higher)
Retrenchment	One-half month pay per year of service (or one month pay, whichever is higher)
Closure (not due to serious losses)	One month pay per year of service (or one month pay, whichever is higher)
Installation of Labor-Saving Devices	One month pay per year of service (or one month pay, whichever is higher)

Never communicate an authorized cause separation to the employee before HR has confirmed the process and the DOLE notification requirement has been addressed. Managers must not announce this independently.





D. Employer-Initiated: Just Cause

Just cause grounds include: Serious Misconduct, Fraud, Willful Disobedience, Gross Neglect of Duty, Commission of a Crime, and other analogous causes.

Strict due process is required under the Twin Notice Rule:

- **First Notice:** Notice to Explain (NTE) stating the specific charge and giving the employee at least 5 days to respond.
- **Opportunity to Respond:** Employee submits written explanation, and an Administrative Hearing is conducted if needed.
- **Second Notice:** Notice of Decision stating the penalty and its factual and legal basis.

Failure to follow the Twin Notice Rule may invalidate the termination regardless of the merits of the case. Even if the employee is clearly guilty of misconduct, a procedural defect entitles them to nominal damages and may result in a finding of illegal dismissal.



MANAGER ROLE

Manager Responsibilities in Offboarding

Manager Owns	HR Owns
Initiating HR coordination before any action	Determining the correct separation type and legal process
Maintaining confidentiality throughout the process	Preparing all formal notices (NTE, Notice of Decision, Contract End Notice)
Supporting transition and knowledge transfer planning	DOLE notification for authorized cause separations
Conducting the offboarding conversation professionally	Final pay computation and release
Documenting all relevant performance and conduct records	Clearance processing and administrative closeout
Preparing the internal communication plan	Ensuring all legal and compliance requirements are met

Due process must never be skipped, even in clear misconduct cases. The strength of the case does not remove the obligation to follow process.





COMPLIANCE

Financial and Compliance Considerations

Final Pay Inclusions

Component	Applicability
Salary up to the last working day	All separations
Pro-rated 13th month pay	Applicable to full-time employees. Calculated based on months worked in the calendar year.
Separation pay	Required for authorized cause separations. Not required for just cause or voluntary resignation unless contractually agreed.
Unused leave conversion (if applicable)	Depends on company policy and employment contract.
Any other contractually agreed final entitlements	Refer to the employment contract and company policy.

Final pay is released within 30 days from the separation date, subject to completion of clearance. Under DOLE guidelines, final pay should be released within 30 days from the date of separation or from the date all clearance requirements are met, whichever is later.





Clearance Process

Final pay processing commences only after clearance has been completed. The clearance process must be initiated immediately after the separation decision is made.

Clearance Requirement	Person Responsible	Status
Return of company-issued equipment (laptop, phone, access cards, etc.)	Employee and Manager	
Revocation of system and facility access	IT / Manager	
Settlement of financial accountabilities	Finance / HR	
Completion of knowledge transfer and task handover	Employee and Manager	
Submission of all pending deliverables	Employee	
Exit interview conducted	HR / Manager	
All HR documentation submitted and filed	HR	



CULTURAL CONTEXT

Cultural Impact of Offboarding in the Philippines

Understanding cultural dynamics is essential to managing offboarding effectively and preserving team stability. A company that adheres to due process and complies with local laws promotes a culture of fairness, objectivity, and inclusivity. How a separation is handled speaks loudly to the employees who remain.

1. Respect for Authority

Filipino employees may avoid confrontation or direct disagreement with managers. Silence during an offboarding conversation does not necessarily indicate agreement or understanding.

What Managers Should Do	Why It Matters
Invite questions explicitly	Employees may not ask unless given clear permission. Silence is often deference, not clarity.
Confirm understanding directly	Ask the employee to summarize the key next steps. This removes ambiguity without being confrontational.
Avoid assuming acceptance	An employee who nods and stays quiet may still be confused or distressed. Check in again after the conversation.

2. Importance of Dignity and Saving Face

Public or abrupt termination can significantly damage morale and trust in Filipino teams. How the conversation is handled will be remembered, not just by the departing employee but by the entire team.

Best Practice	What to Avoid
Conduct the conversation privately, never in a group or open setting	Calling the employee into a meeting in front of the team
Use calm, neutral, and professional language throughout	Emotional, accusatory, or humiliating language
Acknowledge the difficulty of the situation with genuine empathy	Minimizing the impact or rushing through the conversation
Give the employee time to process before moving to logistics	Immediately handing over clearance forms during the emotional moment



3. Relationship-Oriented Workplace

Workplace relationships are highly valued in the Philippines. Sudden separations create anxiety among remaining employees. How the departure is communicated to the team is as important as how it is communicated to the departing employee.

- Prepare a controlled internal communication plan before the offboarding conversation.
- Avoid oversharing confidential details about the reason for departure.
- Communicate to the team in a timely and measured way to prevent speculation.
- Acknowledge the departing employee's contributions when appropriate.

The remaining team is watching how this is handled. A respectful, professionally managed offboarding signals that the organization treats people with dignity. This directly affects the trust and psychological safety of the employees who stay.





TOOL 02

Offboarding Conversation Framework

The offboarding conversation is one of the most sensitive a manager will have. It requires directness, clarity, empathy, and professionalism in equal measure. Prepare for it. Do not wing it.

Before the Conversation

- Confirm with HR that all documentation is in order.
- Choose a private setting. Never conduct this conversation in an open or shared space.
- Have the key facts ready: the decision, the effective date, and the next steps.
- Prepare for an emotional response. Be ready to pause and give the employee space.
- Do not take calls or check messages during the conversation.





During the Conversation

Principle	What It Looks Like
Be direct and factual	State the decision clearly at the start. Do not build up to it with excessive preamble. The employee should understand what is happening within the first minute.
Reference documented evidence	When appropriate, reference the documented basis for the decision. This removes subjectivity and protects the manager.
Avoid debating or over-explaining	Once the decision is communicated, do not re-argue the case. The conversation is about clarity and next steps, not relitigating the past.
Outline next steps clearly	Tell the employee exactly what happens next: who to coordinate with, what the timeline is, and who their point of contact is for offboarding logistics.
Maintain professionalism and empathy	Acknowledge the difficulty. Wish the employee well. Be human. The employee may be upset. That is expected and acceptable.

After the Conversation

- Inform HR immediately after the conversation concludes.
- Initiate the clearance process.
- Prepare and send the internal team communication if appropriate.
- Document the conversation briefly: date, who was present, key points communicated, and the employee's response.





TOOL 03

Sample Offboarding Conversation Scripts

Use these as starting points. Adapt the language to your context and relationship. Never read directly from a script. Know the key points and speak naturally.

Scenario 1: Performance-Based Termination (Just Cause)

Manager: *Thank you for coming in. I want to have an honest and direct conversation with you today.*

Manager: *Based on our KPI dashboard and the performance discussions we have had over the past four months, you have not consistently met your targets in spite of the support that has been provided to you. Following this, management has made a decision about your continued employment with us.*

Manager: *Please complete your handover to [assigned POC], including endorsement of all files, meetings, and ongoing project details. HR will send you a separate email to guide you through the offboarding process. For any questions and logistical arrangements, please coordinate with the appropriate contacts as indicated in HR's email.*

Manager: *: I understand that this is difficult news. I genuinely wish you success in your next endeavors. We will provide you with all the necessary documents and support to assist you in your next steps.*

Pause. Give the employee space to respond.

Answer questions factually. Do not debate the decision.





Scenario 2: Voluntary Resignation Acknowledgment

Manager: *I have received your resignation and I want to acknowledge it formally today. I respect your decision and I appreciate you giving us the appropriate notice period.*

Manager: *Over the next 30 days, let's make sure we have a solid handover plan in place. I want to set up time this week to map out what needs to be transitioned and to whom. HR will also reach out to you with the offboarding process and your final pay details.*

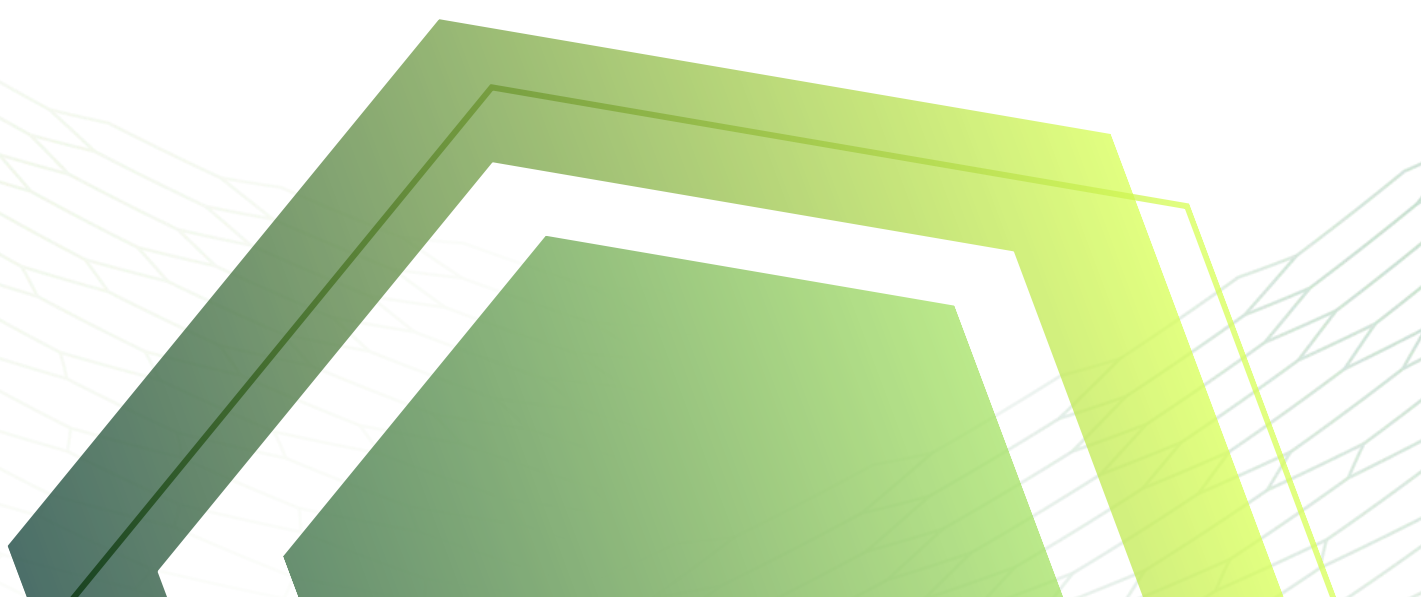
Manager: *I want to say that working with you has been valuable. I appreciate the contributions you have made to this team and I wish you well in what comes next.*

Scenario 3: End of Fixed-Term Contract

Manager: *As we discussed when you joined, your contract with us is coming to its end date on [date]. I wanted to have this conversation to confirm that timeline and to start planning for the transition.*

Manager: *HR will be in touch to walk you through the offboarding process and your final pay details. On my end, I would like to schedule time this week to begin the knowledge transfer and handover.*

Manager: *Thank you for your contributions during your time here. It has been a pleasure working with you.*





Scenario 4: Redundancy (Authorized Cause)

Manager: *I want to be direct with you about a significant change that affects your role. As part of a business decision at the organizational level, your position is being made redundant. This decision is not a reflection of your performance or your contributions to the team.*

Manager: *This means that your last working day will be [date]. You will receive your separation pay and final pay as required under Philippine labor law. HR will send you a detailed email outlining everything you are entitled to and the process from here.*

Manager: *I know this is difficult news and I want to acknowledge that. I am grateful for the work you have done here and I will support you however I can through this transition.*

Give the employee time to process. Answer questions factually. Do not make promises about separation terms that HR has not confirmed.





TOOL 04

Knowledge Transfer Guide

Effective knowledge transfer protects operational continuity and preserves institutional knowledge. Start the knowledge transfer process as early as possible in the offboarding timeline.

Knowledge Transfer Plan Template

Area	Key Information to Transfer	Handover Recipient	Target Date	Completed
Ongoing projects	Status, key stakeholders, open items, next steps			
Client relationships	Key contacts, communication history, preferences			
Recurring tasks	Frequency, how-to, tools used			
System access and tools	What systems, login details (to IT), workflows			
Pending deliverables	What is outstanding, deadline, dependencies			
Internal processes	Undocumented processes that only this person knows			
Team dynamics and context	Useful context the incoming person should know			





Knowledge Capture Form

Use this to capture key institutional knowledge from the departing employee. Complete this before their last working day.

Employee Name and Role:

Last Working Day:

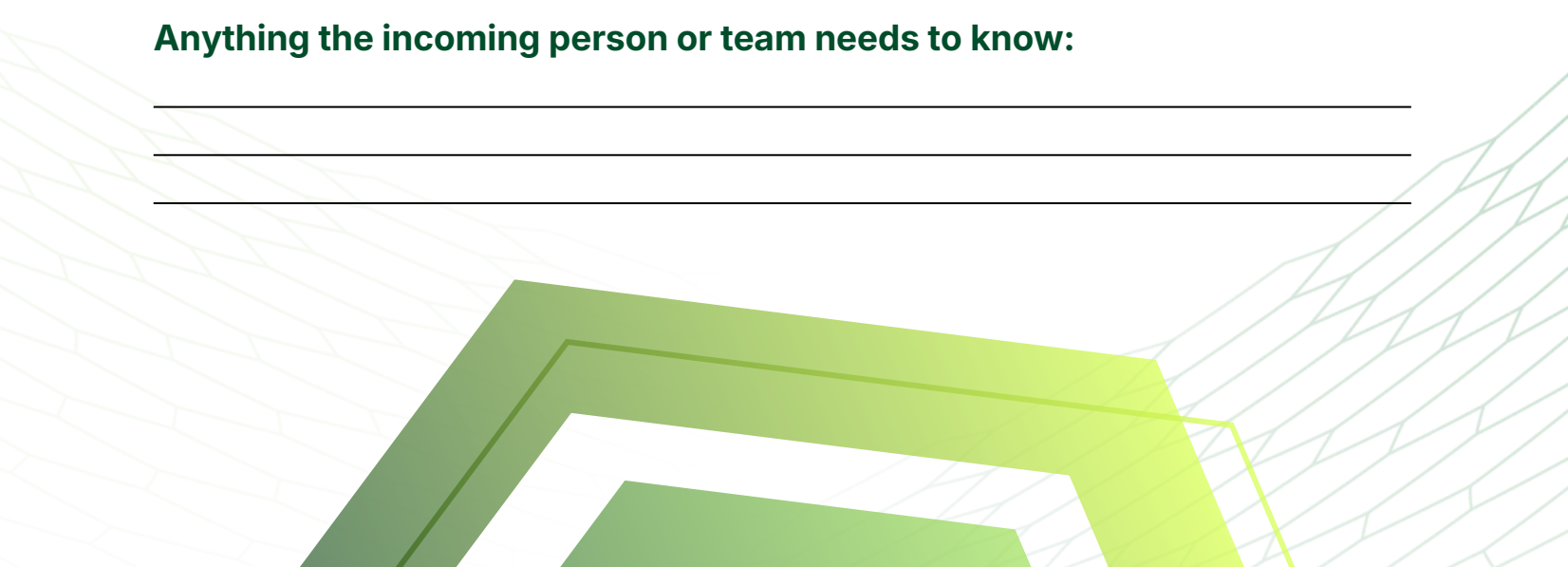
Key ongoing projects and their current status:

Key client or stakeholder relationships to hand over:

Recurring tasks and how they are completed:

Systems, tools, and processes only this employee manages:

Anything the incoming person or team needs to know:





TOOL 05

Internal Communication Template

How you communicate a departure to the remaining team matters. A clear, calm, and timely message prevents speculation and preserves stability. Coordinate the wording and timing with HR before sending.

Keep the message brief. State the fact of the departure, express appreciation where appropriate, and communicate any transition arrangements. Do not share the reason for the departure unless it is publicly known and appropriate to share.



Template: Voluntary Resignation or Contract End

Subject: Team Update

Hi team,

I wanted to let you know that [Employee Name] will be leaving the team on [date]. [He/She/They] has decided to pursue a new opportunity.

We are grateful for [Employee Name]'s contributions during [his/her/their] time with us. [He/She/They] has made a real impact on [specific contribution if appropriate].

Over the coming weeks, [Employee Name] will be transitioning [his/her/their] responsibilities to [recipient name or 'the team']. If you have any questions about ongoing work or projects, please reach out to [POC].

Please join me in wishing [Employee Name] all the best.

[Manager Name]



Template: Employer-Initiated Separation (Where Appropriate)

Subject: Team Update

Hi team,

I want to share that [Employee Name]'s last day with the team will be [date].

We appreciate [his/her/their] contributions during [his/her/their] time here and wish [him/her/them] well.

In the meantime, [specific transition arrangement]. If you have questions about any ongoing work, please reach out to [POC].

Thank you for your continued focus and commitment.

[Manager Name]

Do not share the reason for an employer-initiated separation in internal communications unless HR has confirmed it is appropriate to do so. Oversharing may create legal exposure and damages the dignity of the departing employee.





TOOL 06

Clearance Tracker

Use this tracker to manage the clearance process from separation to final pay release. Complete each item in order. Final pay processing commences only after all clearance items are completed

Employee Name:

Separation Type:

Last Working Day:

Target Final Pay Release Date:

Clearance Item	Responsible Party	Date Completed	Notes
Company laptop returned	Employee / Manager		
Company mobile phone returned	Employee / Manager		
Access cards and physical keys returned	Employee / Manager		
Any other company-issued equipment returned	Employee / Manager		
System access revoked (email, tools, platforms)	IT / Manager		
Facility access revoked	IT / Admin		
Financial accountabilities settled	Finance / HR		



Clearance Item	Responsible Party	Date Completed	Notes
Pending deliverables submitted	Employee		
Knowledge transfer completed	Employee / Manager		
Knowledge Capture Form completed	Employee / Manager		
Exit interview conducted	HR / Manager		
All HR documentation submitted	HR		
Internal communication sent	Manager		
Final pay computation completed	HR / Finance		
Final pay released	HR / Finance		

Final Manager Checklist

- All clearance items completed and signed off.
- Knowledge transfer completed and documented.
- Internal communication sent to the team.
- HR notified that clearance is complete.
- Exit interview feedback reviewed.
- Any process improvements noted for future onboarding.

Compliance protects you legally. Respectful handling protects your employer brand. Documentation protects your decision. All three matter equally in the Philippines.





Atticus Solutions

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