Performance Evaluations Demystified

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Today's session will help you to:

- Discuss the importance of effective performance management
- Learn your role and responsibilities with regard to performance management and providing effective feedback
- Explore the importance of understanding your team
- Obtain tips on writing and conducting effective feedback/developmental conversations to help promote a two-way relationship and foster clear communication
- Put learned knowledge into action

58%

In a survey that was conducted by Deloitte, more than half the executives questioned (58%) believe that their current performance management approach drives neither employee engagement nor high performance.

What's Going on With Performance Management?

Lack Of Timeliness Of Feedback

It's A Surprise

Too Much Paperwork And Time

A Box To Check Off Each Year

How Do We Fix This?

- Set Expectations and Goals on a Regular Basis
- Practice Continuous Feedback through coaching = Collaborative Process

What is Performance Management?

- The process of **setting expectations**, **aligning goals**, **assessing results**, and **focusing on staff development** through ongoing conversations between managers and their direct report(s).

Effective Performance Management Helps Us To:

- **Target critical talent** for development and retention
- **Execute strategy** by prioritizing and aligning goals and objectives
- **Improve performance** of groups and individuals
- **Make better pay decisions** based on performance and desired results
- **Identify top performers** to develop a succession plan

Source: Sibson Consulting

Performance Management

SETTING EXPECTATIONS	GOALS AND OBJECTIVES	GOAL ALIGNMENT	ASSESSMENT OF PERFORMANCE	PERFORMANCE CALIBRATION	FEEDBACK AND DEVELOPMENT

Effective Performance Management Involves Everyone!

Human Resources: "We *support* the process."

Supervisor: "I *partner* in the process."

Leadership: "We *champion* the process."

Employee: " I *own* the process."

Things to Remember about Effective Performance Management

- Should be an ongoing process of setting expectations, executing plans and evaluating results.
- Expectations should be specific and mutually understood.
- Engagement is increased when people are involved in planning the work.
- **How** work gets accomplished is as important as **what** gets accomplished.
- Regular, honest feedback increases understanding and positive performance.

Setting Goals and Expectations: A Collaboration

Your Role as Supervisor

1. Clearly communicate expectations re: job responsibilities and competencies (skills) and behaviors

2. Communicate how individual goals align with department and organization goals

3. Help your employees set clear, measurable performance goals

4. Offer advice and guidance regarding your employee's performance on a consistent, on-going basis

Setting Goals and Expectations: A Collaboration

Your Employee's Role

- Understand how their role aligns with division and department goals, and participate actively in setting expectations
- Work with you to set clear, measurable performance goals
- Monitor their own performance compared to expectations
- Seek advice and guidance as needed from you

Results from SMART approach

Sense of satisfaction

Better employee engagement

Aligned with organizational goals

Action Brainstorming Worksheet

_____

(Handout)

Whether it's actions or behaviors, what could you STOP, do LESS of, KEEP DOING, do MORE of - and what could you START?

	STOP	Do LESS	KEEP DOING	Do MORE	START
1					
2					
3					

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Common Pitfalls When Goal Setting

- Too many goals
- Unclear accountability
- Not aligning to job description
- Unclear expected results or measures

Understanding Your Team

3 types of employees that may be on your team:

- *Jenny*: Performing and just wants to do their job
- *Sara*: A challenging underperformer who is combative and resistant to feedback
- *Michael*: Excelling but you may lose them

How I Like To Be Coached

(Handout)

How I Like to Be Coached

This tool will help you clarify and share your needs and expectations while in a coaching relationship with your manager, direct reports, or peers. Trust and communication are the keys to successful coaching relationships. The more your needs and expectations are communicated, the greater the chance for a productive, enjoyable and developmental experience. Be sure to review this periodically with your coach as your needs, expectations and priorities are likely to change.

In a word, the one thing I need most from a coach is:

To be more specific, I need:

The three things which motivate me are:
Example 1: Relationship with my manager and co-workers
Example 2: Recognition for accomplishments

The top three things which frustrate me are:

My favorite communication medium(s) are (email, phone, in person, etc.):

If I am frustrated, I might:

My coach can help me reach my full potential by (i.e., my expectations of a coach are):

Crawford

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Giving Feedback

GOAL SETTING CORRECTIVE ACTION MOTIVATIONAL

Types of Feedback

What's the Difference Between Corrective Action/Discipline and Coaching?

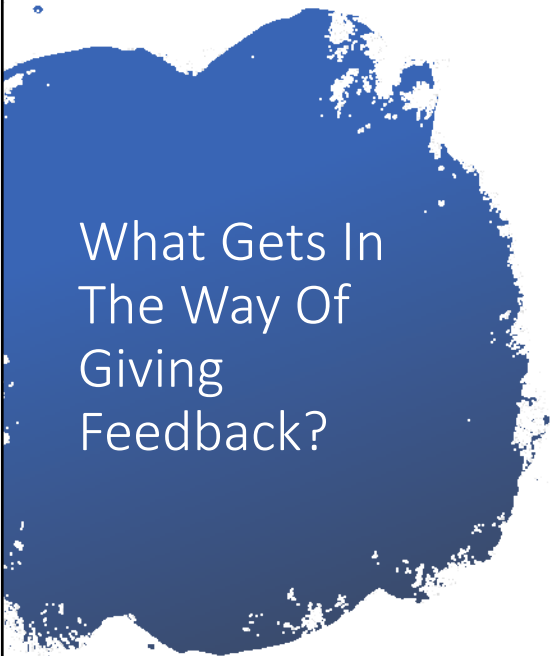## Corrective Action/Discipline

- ➢ Using company disciplinary procedures to address employee issues puts ownership on manager and the business.
- ➢ Following disciplinary actions addresses the problematic activity but often does not get to the root of the problem.
- ➢ Discipline with little to no interaction can damage morale, productivity and increase turnover.
- ➢ Creates a workplace environment that is void of a healthy work relationship.

Coaching

- ➢ Puts ownership of the problem with the manager and employee.
- ➢ Looks at employee conflict or challenges as an opportunity for the manager and employee to learn how to improve their relationship.
- ➢ Fosters an interactive process that pins down the root cause of the conflict.
- ➢ Creates a workplace based on an active relationships between the manager and employee.

Source: http://smallbusiness.chron.com/discipline-vs-coaching-workplace-17616.html

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What Gets In The Way Of Giving Feedback?

What Gets In The Way Of Giving Feedback?

- Fear of the other person's reaction or feeling intimidated
- Fear of damaging the relationship
- Fear of losing control of the discussion
- Uncertainty about whether they, themselves are over-reacting
- Not wanting to hurt people's feelings
- It's not easy to do
- You don't know how to give feedback
- Other?

Goal Setting Best Practices

Is it SMART?	Is the goal PURE?
Specific	**P**ositively-stated
Measurable	**U**nderstood
Actionable	**R**elevant
Realistic	**E**thical
Time-bound	

Effective Feedback Model

S **Situation**
Describe the situation. Be specific about when and where it occurred.

B **Behavior**
Describe the observable behavior. Don't assume you know what the other person was thinking.
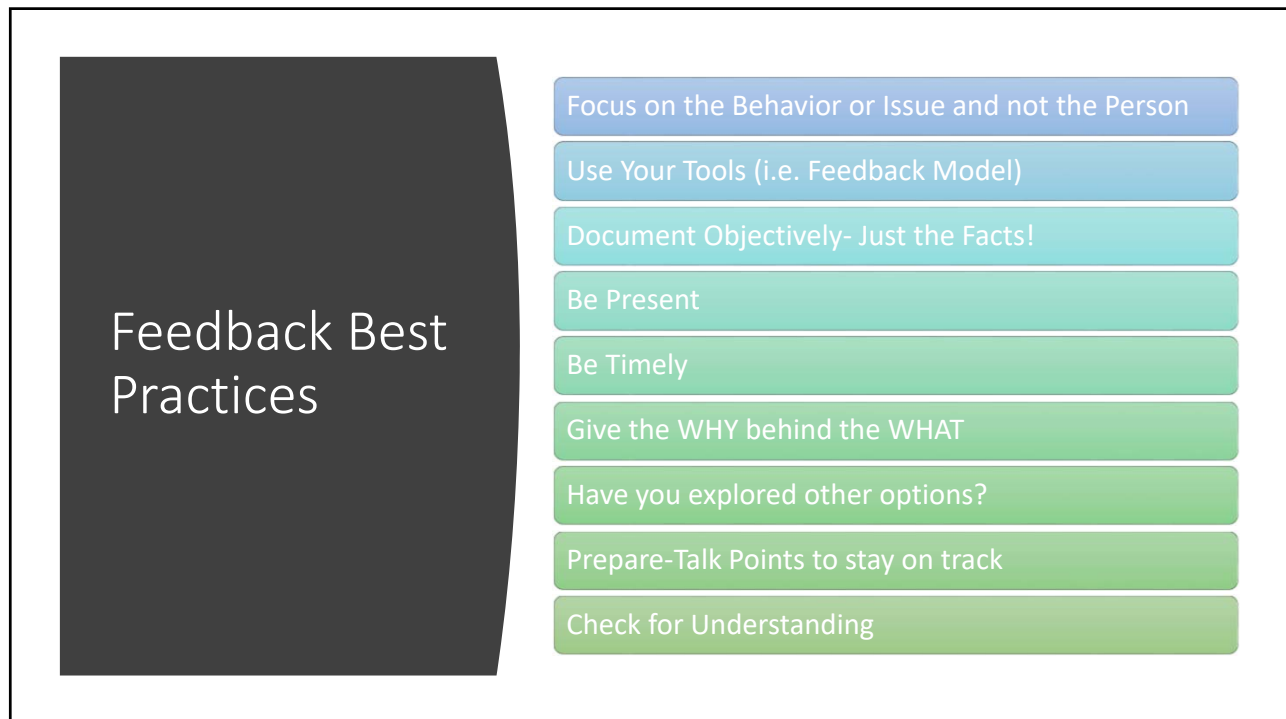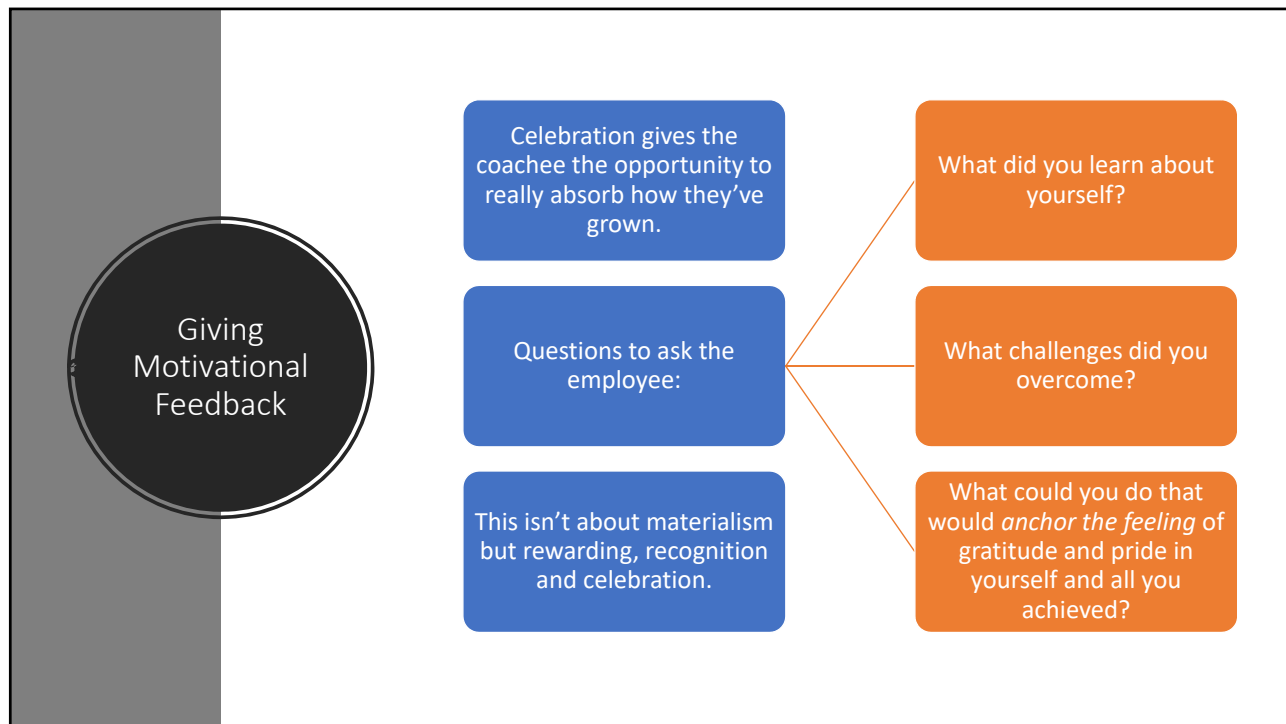
I **Impact**
Describe what you thought or felt in reaction to the behavior.

Center for Creative Leadership

Source: https://www.ccl.org/articles/leading-effectively-articles/nonprofit-know-how-giving-feedback/

Giving Motivational Feedback

Celebration gives the coachee the opportunity to really absorb how they've grown.

Questions to ask the employee:

This isn't about materialism but rewarding, recognition and celebration.

What did you learn about yourself?

What challenges did you overcome?

What could you do that would *anchor the feeling* of gratitude and pride in yourself and all you achieved?

Feedback Best Practices

Focus on the Behavior or Issue and not the Person

Use Your Tools (i.e. Feedback Model)

Document Objectively- Just the Facts!

Be Present

Be Timely

Give the WHY behind the WHAT

Have you explored other options?

Prepare-Talk Points to stay on track

Check for Understanding

Handling Challenging Employees

- Don't get hooked
- Fix your face
- Don't take it personally
- Stay on topic- Don't be distracted
- Document, Document, Document
- Back all feedback up with facts/data
- Summarize and Paraphrase to check for understanding

Benefits of Performance Check-ins

You're collaborating reach and exceed goals.

You're viewed as a delegator and not a doer.

It will help you complete performance reviews without anxiety.

You can assist in developing your employees' talents and skillsets.

It increases productivity and decreases turnover for the business.

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40%

The amount of information you forget 24 hours after it's discussed.

Source: http://ol.scc.spokane.edu/jroth/Courses/English%2094-study%20skills/MASTER%20DOCS%20and%20TESTS/Curve%20of%20Forgetting.htm

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Documenting Your Check-In Sessions

✓ Document the facts and ONLY facts not opinions, date all notes!

💡 Remember the WHY behind this meeting- Collaborative Growth

◎ Remember what the end result is- Committed Action to Goals

👥 Delegate- Ask the employee to send you a copy of their action plan.

💡 Know Your Role!   The Supervisor is the GPS and Employee is the putting in their destination

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Documentation Best Practices

- Keep file open daily to make note of accomplishments, etc.
- Be open about documentation
- Be an Equal Opportunity Documenter
- Use talk points to keep you on task
- Be objective, factual and specific
- Who, What, Where, When, Why & How

Why Accountability Matters

- Our role as a leader is to help the employee discover on their own the role of accountability.
- A powerful question to ask: "How do you want to hold yourself accountable?"
- If there's a lack of follow through– "Go back to the videotape. "
    - Remind the employee of their career goals.
- What if they change their "address"
    - How do you course correct?

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Challenging Employee

High Performing Employee

Performing/A-OK Employee

Remember Them? What's Your Feedback Approach?

Coaching In Action

- Take the next **5 minutes** to think about one of the 3 types of employees we discussed.
- Find a coaching partner to play the role of that team member.
  - Using SBI Model, determine what type of coaching they need: Goals, Corrective Action or Motivation.
  - Coach your partner for **5 minutes.**
  - Partner will provide feedback on the coaching session.
  - **Things to think about:**
  - What's going to be your approach/intention in communicating this message?
  - What are some topics you will want to make sure to cover during your chat?
  - Switch roles

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