Performance Management

GABRIELLA WHITE

Agenda

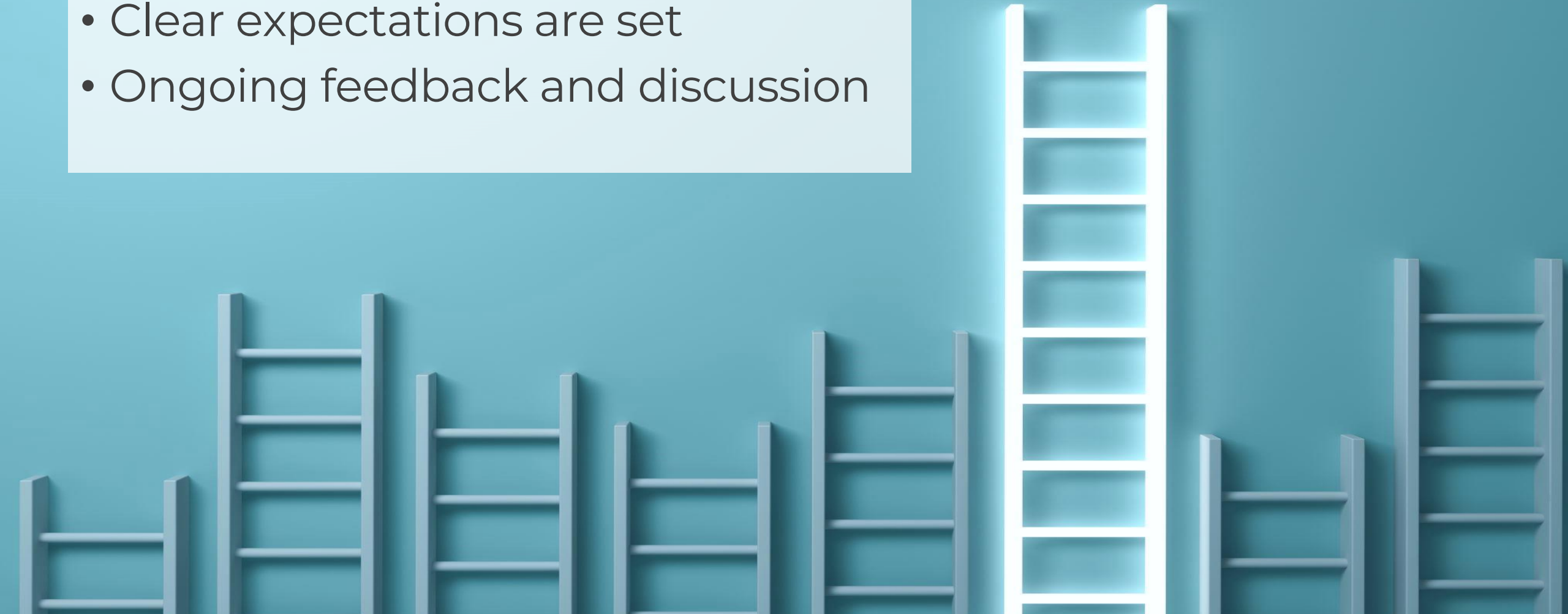- What is Performance Management?

- Our Performance Process

- Effective Conversations

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What is Performance Management?

- Continuous, positive and constructive collaboration
- Clear expectations are set
- Ongoing feedback and discussion

Objectives of Performance Management

Increased Communication

Improved Performance

Employee Development

Succession and Staff Planning

How is Performance Management Used?

Right Person Right Seat

Employee Onboarding

Ongoing Feedback and Discussion

Who is Responsible?

Employee Responsibilities

- Bring issues, obstacles, and barriers to success to the supervisor's attention

- If you do not have what you need, ask for help

- Speak up and bring your knowledge, experience, and expertise to the table

- Ask for clarity if expectations or desired outcomes are unclear and be open to feedback and coaching

Supervisor Responsibilities

- Provide employees with the tools, training, and resources they need to succeed

- Offer regular, constructive, and fair feedback and clearly communicate expectations

- Regularly show meaningful appreciation through calling out successes and achievements

- Address performance issues in a proactive and timely manner to resolve them before they require corrective action or become a detriment to the department or company

Be Present

Our Performance Process

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The Performance Process

Recruitment → **Onboarding** → **Performing and Ongoing Feedback** → **Quarterly Conversations and Annual Conversation**
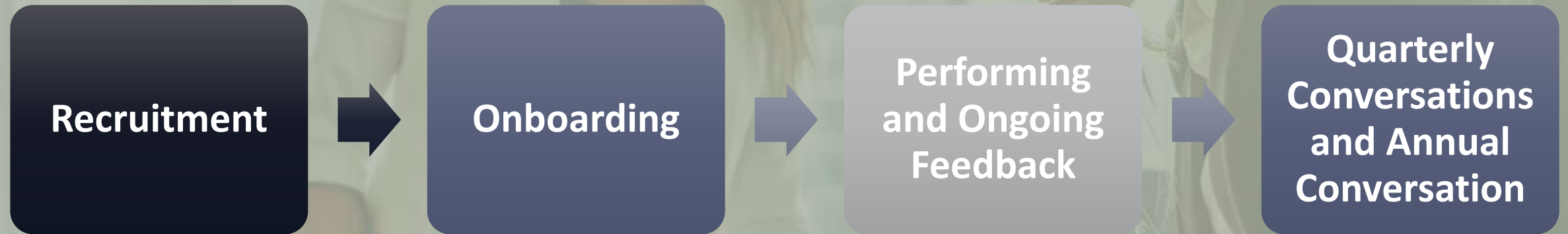
Recruitment

Right Person/Right Seat

Experience, Education, Knowledge, Skills, Abilities

Roles, Metrics, Job Duties

Assessment

Interview Guides

Onboarding

Set your new employee up for success

Training Plan

Check In's

Make yourself available and present

Department Inclusion

Training Buddy

Performing and Ongoing Feedback
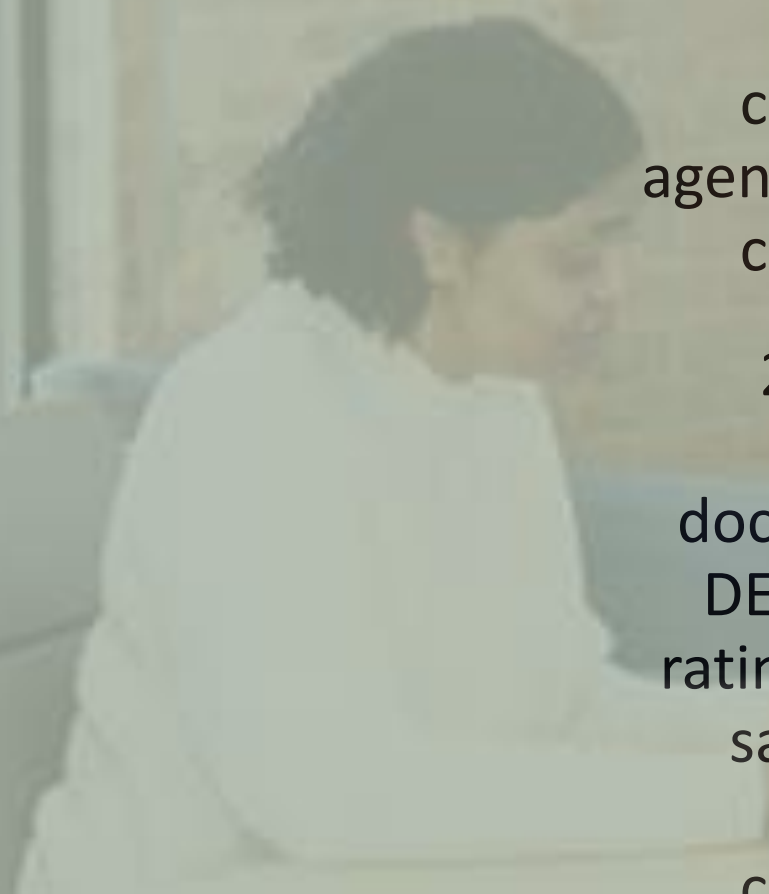
Employee is independently performing work

Employee and Supervisor have Weekly, Biweekly, or Monthly one on one's

Leaders remain approachable and present

Regular praise and/or redirection and feedback is provided

Quarterly and Annual Conversations

Wrap up for each quarter following quarterly conversation agenda topics of conversation

2nd and 4th quarter documented in DESIGNU with ratings - follows same agenda topics of conversation

Formal Performance Management Timeframe

February - Quarterly Conversation → May - Quarterly Conversation - Semi Annual in DESIGNU → August - Quarterly Conversation → November - Quarterly Conversation - Annual in DESIGNU

Quarterly Conversation Timeline

Employee completes Self Review form

7 Days

Supervisor review drafted, discussion, and acknowledgement

14 Days

5-Point Rating Scale

Rating	2023	2022
Exceeds Expectations	4.0 – 5.0	4.5 – 5.0
Meets and Sometimes Exceeds Expectations	3.5 – 3.9	3.7 – 4.4
Meets Expectations	3.0 – 3.4	2.7 – 3.6
Needs Improvement	2.1 – 2.9	2.0 – 2.6
Does Not Meet Expectations	1.0 – 2.0	1.0 – 1.9

Weighting Scale

Section	Sub-section	Sub-topic Weighting	Section Weighting
Core Values	Dedication Enthusiasm Synergy Integrity Goal-Oriented Nimble	16 16 16 20 16 16	20
Roles and Metrics	Roles Metrics	75 25	60
Rocks	Rocks	20	20

Rating Definitions

Exceeds Expectations
- Is self-directed, works independently with minimal coaching, routinely performs well beyond maximum level of proficiency or competence, consistently exceeds performance expectations in quality and timeliness

Meets and Sometimes Exceeds Expectations
- Frequently exceeds or performs at expectation, occasionally surpasses maximum level of proficiency or competence, quality and timeliness, requires occasional direction or coaching

Meets Expectations
- Produces acceptable work products, performs at expected level of proficiency or competence and timeliness, requires some direction and coaching, may need help assigning the correct priorities and determining right course of action
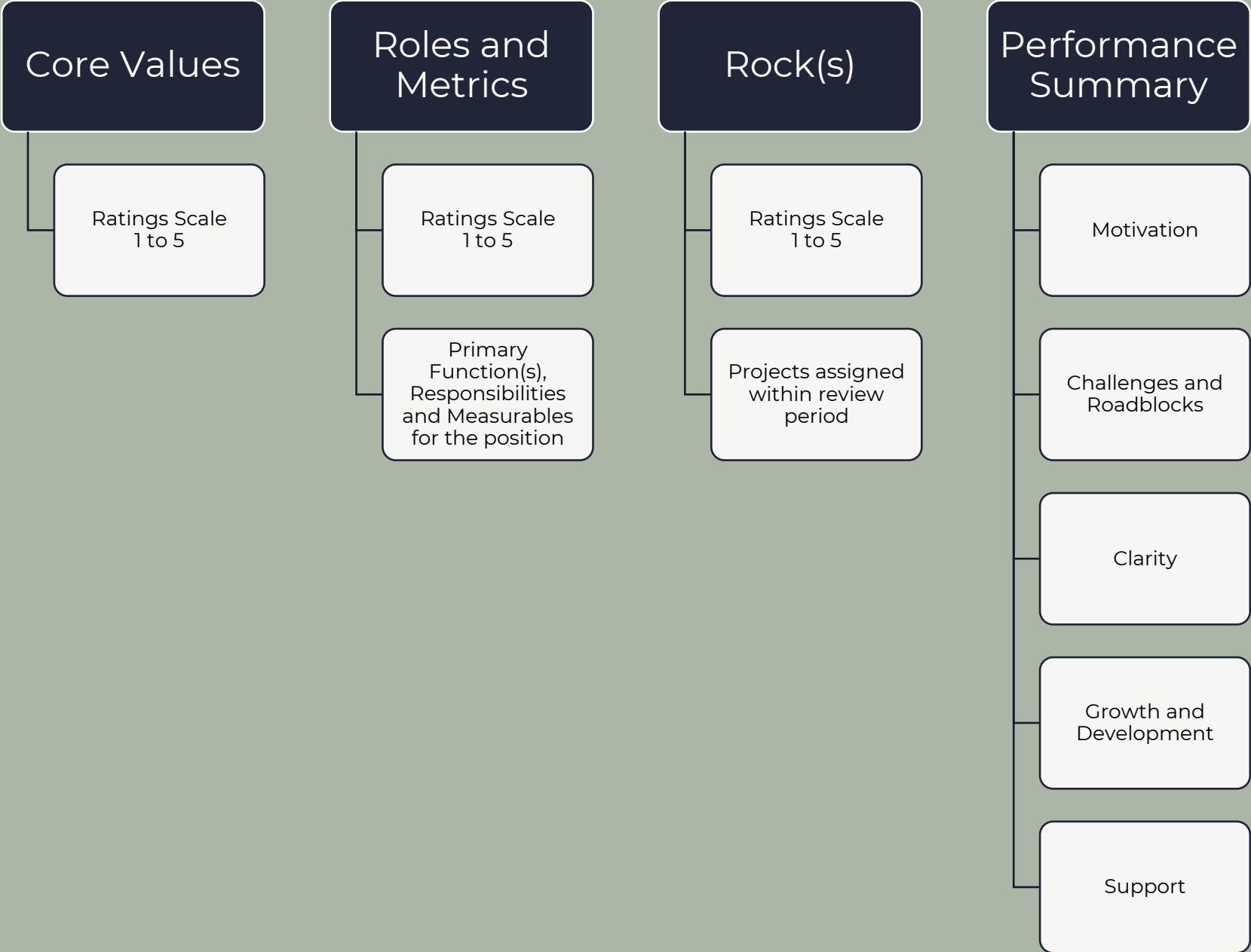
Needs Improvement
- Performance is usually at or barely meets job requirements, the need for further development and improvement is clear, requires more than normal time to coach and correct work, regularly does not complete assignments on time or completes assignments, but with unacceptable quality

Does Not Meet Expectations
- Developmental approaches have been utilized without success, employee is either unwilling or unable to do the job, performance must significantly and immediately improve with sustained and continuous improvement

Form Sections

Core Values
- Ratings Scale 1 to 5

Roles and Metrics
- Ratings Scale 1 to 5
- Primary Function(s), Responsibilities and Measurables for the position

Rock(s)
- Ratings Scale 1 to 5
- Projects assigned within review period

Performance Summary
- Motivation
- Challenges and Roadblocks
- Clarity
- Growth and Development
- Support

Core Values

Dedication

Enthusiasm

Synergy

Integrity

Goal-Oriented

Nimble

Roles and Metrics

Primary Function(s)

Responsibilities

Measurables

Rocks

Simply Put – a Business Goal

One of the most important things (top 3 to 7) you will be devoting consistent and dedicated time to in the next 13 weeks

Specific and measurable priority that will move the team, department and/or company forward in achieving annual goals

Performance Summary

Motivation

Challenges and Roadblocks

Clarity

Growth and Development

Support

DESIGNU: Performance Management

Performance Review Summary - User EPM

📘 **Launch Review**

| My Assigned Reviews | My Personal Reviews |

Title:

[   ]   🔍 **Search**

Status:
☑ Not Started ☑ In Progress ☐ Completed ☑ Incomplete ☐ Expired

Title ⇅	Description	Status ⇅	Start Date ⇅	Due Date ⇅	Last Modified Date ▾
📘 Complete Self Review for 2023.4 Semi-Annual Conversation	2023 Semi-Annual Conversation	Not Started	5/6/2023	5/13/2023	5/6/2023
📘 Complete Self Review for 2023.3 Semi-Annual Conversation	2023 Semi-Annual Conversation	Not Started	5/6/2023	5/13/2023	5/6/2023
📘 Complete Self Review for 2023.2 Semi-Annual Conversation	2023 Semi-Annual Conversation	Not Started	5/6/2023	5/13/2023	5/6/2023
📘 Complete Self Review for 2023 Semi-Annual Conversation	2023 Semi-Annual Conversation	Not Started	5/6/2023	5/13/2023	5/6/2023

(4 Results)

Your Tasks

	Due Date
Complete Self Review for 2023 Semi-Annual Conversation	5/13/2023
Complete Self Review for 2023.2 Semi-Annual Conversation	5/13/2023
Complete Self Review for 2023.3 Semi-Annual Conversation	5/13/2023

Overview

Slide content:

2023 Semi-Annual Conversation   Options ▾

Navigation sidebar:
- Overview
- 2023 Core Values
- 2023 Roles and Metrics
- 2023 Rocks
- 2023 Performance Su...
- Summary
- Employee Acknowledg...

User EPM
11/14/2022 - 5/14/2023

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Overview

Welcome to the Semi-Annual Conversation.

This semi-annual conversation will cover both your 1st and 2nd performance quarter, generally November through February and February through May.

We encourage you to provide feedback, speak courageously and listen generously. The communication between employees and supervisors is critical to success. Clear and honest communication is critical as we strive to be the expert in our roles, perform at a level that supports excellence in service, and continue to grow in our current roles to get the future we plan for.

Review Step Progression

- Self Review for 2023 Semi-Annual Conversation
  Due : 5/13/2023 ✔
- Supervisor Review for 2023 Semi-Annual Conversation
- Employee Acknowledgement

Get Started

Reopen Step   Get Started

Supervisor Review step gives the option to Reopen Step

Core Values

Overview:

By exhibiting our Core Values of Dedication, Enthusiasm, Synergy, Integrity, Goal-Oriented, and Nimble, we foster an environment based on the commitment to do the right thing, the right way, with the energy and accuracy required to meet our goals. Putting forth our Core Values in our day-to-day performance allows us to provide the level of service our reputation demands.

Instructions:

- Rate each Core Value and include your comments and examples of how those behaviors are exhibited.

Ratings Definitions:

- **Exceeds Expectations** - Is self-directed, works independently with minimal coaching, routinely performs well beyond maximum level of proficiency or competence, consistently exceeds performance expectations in quality and timeliness
- **Meets and Sometimes Exceeds Expectations** - Frequently exceeds or performs at expectation, occasionally surpasses maximum level of proficiency or competence, quality and timeliness, requires occasional direction or coaching
- **Meets Expectations** - Produces acceptable work products, performs at expected level of proficiency or competence and timeliness, requires some direction and coaching, may need help assigning the correct priorities and determining right course of action
- **Needs Improvement** - Performance is usually at or meets job requirements, however the need for further development and improvement is clear, requires more than normal time to coach and correct work, either does not complete assignments, or completes assignments, but cannot be relied upon to complete them with acceptable quality, on time and/or without significant rework
- **Does Not Meet Expectations** - Developmental approaches have been utilized without success, employee is either unwilling or unable to do the job, performance must significantly and immediately improve with sustained and continuous improvement

Roles and Metrics

Overview:

- Your *Roles* are the main responsibilities we are each accountable for in our position. Roles can be found on the Job Description. If you are unsure of your roles, discuss with your Supervisor immediately before completing this section.
- Your *Metrics* have been assigned according to your position and can be found on the Job Description. If you are unsure of your metrics, discuss with your Supervisor immediately before completing this section.

Instructions:

- Follow the instructions below for each section: *Roles* first, then *Metrics*.
- Rate your overall performance for the period being reviewed.
- List your *Roles* and *Metrics* in the corresponding comments boxes.
- You MUST provide detailed comments and situational examples.

Ratings Definitions:

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Rocks

Overview:

Rocks are the projects you are responsible for during the review period. ***For documentation, please list your rocks for Q1 and Q2 during the semi-annual conversation and Q3 and Q4 during the annual conversation.***

Instructions:

- If no Rock(s) are assigned the rating is MEETS EXPECTATIONS and comments are N/A.
- If you have Rock(s) assigned, rate overall Rock performance for the time period.
- <u>List Rocks</u> and completion rate. Provide detailed explanation of outcome. Comments must align with and support rating.

Things to consider when rating Rock(s):

- What rocks did you complete and what rocks were incomplete?
- A high completion rate does not necessarily result in a higher overall performance rating.
- The quality of the completed rock should be taken into consideration as well as the completion rate.
- Circumstances outside of your control resulting in an incomplete outcome should be explained.

Ratings Definitions:

- **Exceeds Expectations** - Is self-directed, works independently with minimal coaching, routinely performs well beyond maximum level of proficiency or competence, consistently exceeds performance expectations in quality and timeliness
- **Meets and Sometimes Exceeds Expectations** - Frequently exceeds or performs at expectation, occasionally surpasses maximum level of proficiency or competence, quality and timeliness, requires occasional direction or coaching
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- **Does Not Meet Expectations** - Developmental approaches have been utilized without success, employee is either unwilling or unable to do the job, performance must significantly and immediately improve with sustained and continuous improvement

Performance Summary

Overview:
This section focuses on Performance, Growth, and Support.
Instructions:
Read the questions and provide feedback.

Motivation

- What are you proud of accomplishing?

Challenges and Roadblocks

- What hasn't turned out the way you planned? What was the issue? How did you handle it? What was the outcome?

Clarity

- Are your responsibilities, roles, and metrics for your position clear? If not, please explain.

Growth and Development

- What skills would you like to develop in the near future? Where do you see yourself in 6 months to a year?

Support

- How can your supervisor better support you moving forward?

Exceeds Expectations

Description of Behavior

- Regularly demonstrates superior performance and is extraordinarily competent and productive.
- What is produced and how it is produced far exceed regular standards and expectations of the position.

Performance Standards

- Demonstrates mastery of technical skills; recognized expert by coworkers and is consistently used as the Subject Matter Expert in the department
- Proactively initiates and drives toward implementation of new technology, processes, policies or procedures

Sample Review Comments

- "I demonstrate a consistent and strong work ethic and set an excellent example to others through not only meeting deadlines or completing projects within the timeline, but the outcomes are above and beyond the original framework of the project providing additional resources and tools to the team."
- "George promotes a positive team environment that is reflective of the company's culture and values and ensures there are monthly opportunities for the team to bond whether on-site or off-site. This has led to higher retention in the department as well as a seemingly higher employee morale."

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Meets and Sometimes Exceeds Expectations

Description of Behavior

- Demonstrates strong, consistent performance in all or almost all competencies, skills and responsibilities.
- What is produced and how it is produced meets and often exceeds regular standards and expectations of the position.

Performance Standards

- Always willing to help another team member; exhibits teamwork without prompting and works collaboratively with others.
- Able to reflect on self and how their role fits into larger goals and values for the department and organization; incorporates goals and values into existing role.

Sample Review Comments

- "I quickly identify issues and determine the root cause allowing for management of multiple projects simultaneously and performing well with each."
- "DeQuan takes initiative and is proactive in gathering information, assembling the tools, resources, or team members required to complete a project on time and/or to budget."

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Meets Expectations

Description of Behavior

- Is a dependable, competent, knowledgeable individual who meets the expectations of the position.
- Has a solid, consistent and effective performance.

Performance Standards

- Independently follows through on tasks to completion and to meet requirements
- Prioritizes work appropriately, follows instructions, and exercises knowledge of the position

Sample Review Comments

- "Arthur is able to independently prioritize tasks based on importance and consistently make informed decisions based on available information."
- "I am a consistent performer, a great task scheduler, and have a no-quitter approach to solving issues while consistently contributing to the weekly L10 issues discussions."

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Needs Improvement

Description of Behavior

- Demonstrates adequate performance in most areas but needs improvement in one or more significant aspects that are critical to the position.
- What is produced or how it is produced requires improvement in one or more areas to meet expectations of the position.

Performance Standards

- Requires constant supervision and follow-up of most work products and typically is ineffective or inefficient in primary responsibilities
- Shows inability or disorganization in prioritizing work or completing work assignments and does not review or fact-check policies prior to providing advice

Sample Review Comments

- "I have created a stifling environment that is not helpful in promoting teamwork and has made it difficult for my team members."
- "Augustus does not work within the company process resulting in consistent customer issues resulting in multiple returns, missed goals, or not keeping up with objectives."

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Does Not Meet Expectations

Description of Behavior

- Frequently performs below the level expected of this position in all or almost all key aspects of the position.
- What is produced and how it is produced are below standards and clearly unacceptable.

Performance Standards

- Does not appear to grasp essential duties, even when given training and feedback and requires constant prompting to complete routine tasks or duties.
- Disregards supervisor's direction or constructive feedback and has consistently strained relationships with coworkers.

Sample Review Comments

- "I have made frequent errors that are harmful to business operations and have received numerous complaints about the quality of work."
- "Dory, the quality of work produced is unacceptable, you consistently do not complete the required paperwork, and do not follow the company processes."

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Summary Page

Confirmation Page

2023.3 Semi-Annual Conversation

Options ▼

- Overview
- 2023 Core Values
- 2023 Roles and Metrics
- 2023 Rocks
- 2023 Performance Su...
- Summary
- Employee Acknowledg...

User EPM
11/14/2022 - 5/14/2023

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This message is to confirm you have completed the step. You may now close out of this window. Thank you.

Supervisor Acknowledgement Page

Effective Conversations

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Preparation

Employee Preparation

- Reflect on review period and YTD Performance
- Bring Examples
- Revisit Self-Review
- Be prepared to discuss obstacles and potential solutions
- Be ready to discuss developmental goals

Supervisor Preparation

- Schedule time for preparation
- Evaluate according to established and agreed-upon expectations
- Assess Learning and Development needs
- Remain objective and fair
- Schedule the discussion in advance and let the employee know when and where you will meet

The Conversation

- Private conversation
- Allow for plenty of time
- Be specific
- Employee-led conversation
- Focus and be present.
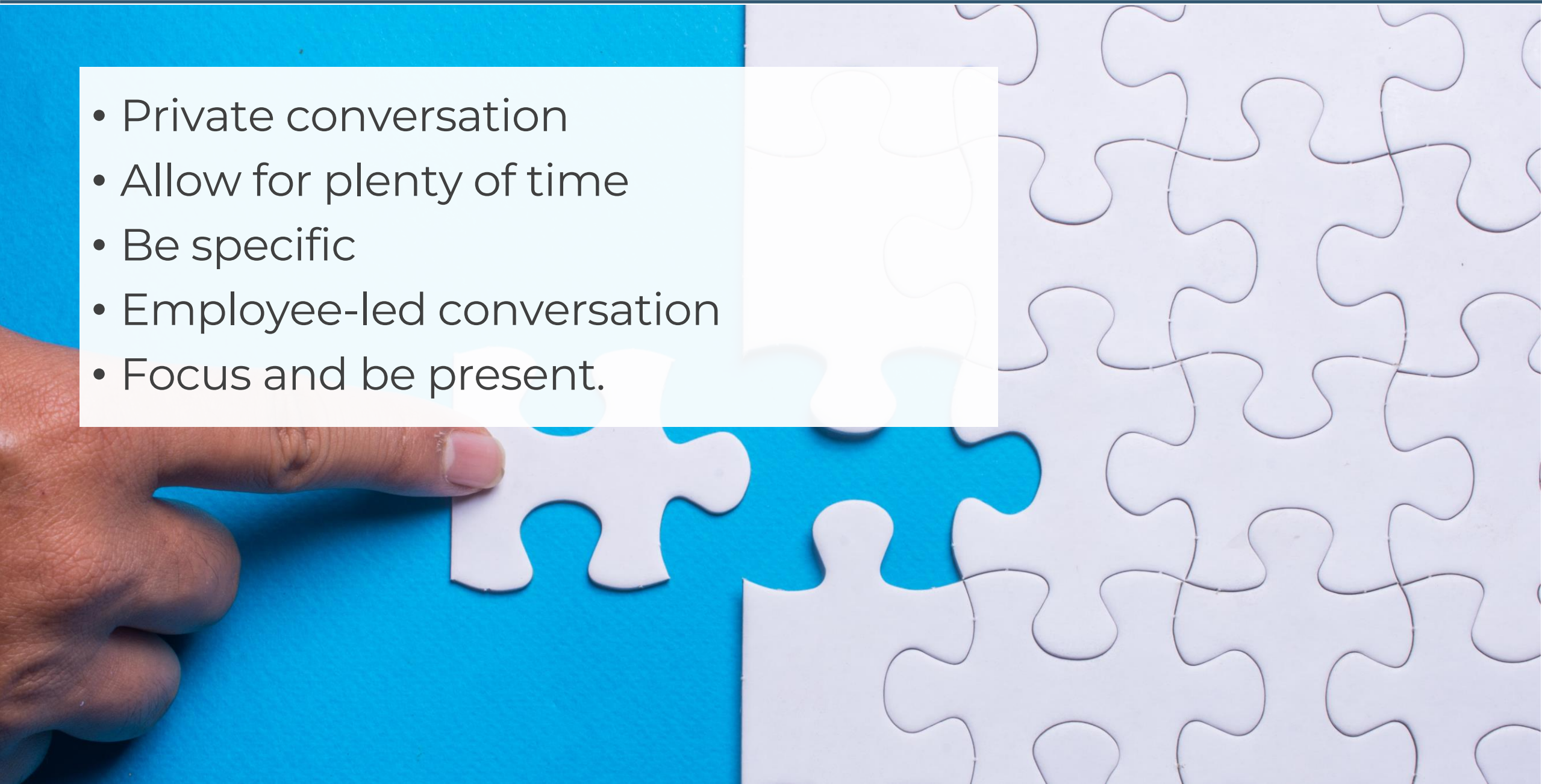
Common Mistakes to Avoid

Failing to follow review procedures and timeliness

Not thoroughly documenting performance feedback

Failing to align written ratings with the verbal conversation

Giving inaccurate ratings or feedback to avoid having difficult conversations

Basing ratings on factors outside of the job descriptions or understood metrics, roles or rocks

Not providing specifics on what was done well or needs improvement

Four Essential Skills

Listen to Learn

- Be Present
- Focus on what the other person is saying
- Respond so others feel heard and valued

Inquire for Insight

- Ask open-ended questions
- Focus on moving forward, not the past
- Use "what" and "how" rather than "why"

Tell your Truth

- Be brave, honest and respectful
- Be open to others perspective
- Avoid blame or judgement, focus on forward movement

Express Confidence

- Highlight relevant qualities and/or skills
- Cite previous successes
- Offer support as needed

Four Core Conversations

Goal Setting
- Occurs at beginning of project or goal
- Should be clear and compelling
- Should be written down and reviewed frequently

Praising
- Immediate and incremental
- Reflection encouraged
- Specific about behavior or performance

Redirecting
- Immediate and incremental
- Specific about behavior or performance
- Honest and kind

Wrapping Up
- Occurs at the end of goals and projects
- Results and accomplishments are celebrated
- Learning acknowledged

SMART Goals

S - Specific

What will be accomplished? | What actions will be taken?

M - Measurable

What data will measure the goals? | Does the goal include a measurable to measure success against?

A - Attainable

Is the goal doable? | Are the necessary skills and resources available to achieve the goal?

R - Realistic / Relevant

How does the goal align with broader goals? | Why is the result important to department or company success?

T - Timely

What is the time frame for accomplishing the goal? | Is this the appropriate time frame?

Specific: I received low marks on my ability to use PowerPoint at my last performance review. Improving my skills requires that I learn how to use PowerPoint efficiently and practice using it by creating various presentations. I'd like to be more proficient using PowerPoint in time for my next review in six months.

Measurable: By the time of my next review, I should be able to create presentations that incorporate graphs, images, and other media in a couple of hours. I should also be able to efficiently use and create templates in PowerPoint that my coworkers can also use.

Attainable: Improving my PowerPoint skills is instrumental in moving forward in my career and receiving a better performance review. I can set time aside every week to complete CyberU PowerPoint courses in DesignU. I can also ask coworkers and my manager for PowerPoint tips.

Realistic / Relevant: Working with PowerPoint is currently 25% of my job. As I move up in the company, I'll need to spend 50% of my time creating PowerPoint presentations. I enjoy my career and want to continue to grow within this company.

Timely: In six months, I should be proficient in PowerPoint ensuring it only occupies 25% of my workload instead of the nearly 40% of the time it occupies now.
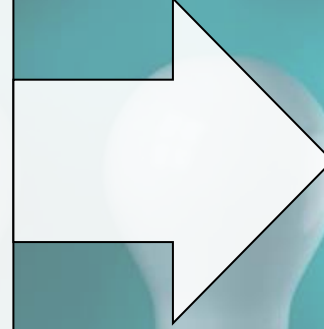
Smartified

To grow in my career, I need to improve my PowerPoint skills. By taking CyberU courses, I'll improve my PowerPoint skills so that it only requires 25% of my work time.

Milestone: Complete a CyberU PowerPoint course in three months.

Deadline: Next employee review in six months.

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What's Next?

Start reflecting now

- What went well?

- What didn't go well?

- Review your job description for Roles, Metrics.

- Reflect on your Rocks.

Schedule your prep and conversations.

Self-Reviews open on Monday, May 15th.

Self-Reviews are sent to Supervisors upon completion and will auto-forward at end of day on Sunday, May 21st.

Reviews are to be completed by Monday, June 5th.

Get the Future You Plan For and Let's be 100% by deadline.

Scan to provide
your feedback

Questions?
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