

COACHING, DEVELOPING, AND EVALUATING PEOPLE

PURPOSE AND OBJECTIVE

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CASE STUDY: SMT

**CASE STUDY: DEPARTMENT
HEAD**



PURPOSE AND OBJECTIVE

Why do we coach, develop, and evaluate? Because **people count!** What's the purpose and end objective?

- Identify strengths, weaknesses, and areas for improvement in people, regardless of tenure, using a fact driven evaluation.
- This is designed for anyone in a leadership role (Department Head, SMT, or GM).
- When to use?
 - When they are new in role (60-180 days).
 - If someone is off track.
 - Determine why and if it is correctable. We can't fix a problem if we can't identify the problem.
 - To determine if they can do more. Evaluate if they have the potential to take on more responsibility and determine developmental needs.
 - Can lead to more authority and/or potentially being promoted.

Being evaluated is a key component of the circle of success. The goal, with input and participation from both the evaluator and associate, is to have a constructive, fact-driven evaluation to correct and develop gaps or problem areas; as well as determining if those areas can be corrected.

Everyone will go through this process. Our commitment is to be fair, factual, and communicative of positives, negatives, or areas of improvement. Our objective is to find ways to help people improve themselves, and thus we improve as an organization!

PROCESS

- **Communicate** face-to-face, the purpose and objective. Include the timeline and both your responsibilities. Memorialize in writing.
- Determine a maximum of **three traits** to evaluate during the 90-day evaluation period, with input from the associate being evaluated (binder section 4).
 - By the end of the evaluation you will be able to score each trait as a plus or minus.
- **Monthly**, determine a **maximum of two** traits to evaluate.
 - Let them pick one of the traits but be honest—if they pick one you both agree they are good at, then you don't need to evaluate that trait.
 - At the end of the month score the traits you evaluated with a plus or minus.
- Build bi-weekly **benchmarks** that will help you determine if the 1-2 monthly traits are pluses or minuses.
 - Benchmarks are scored bi-weekly with a plus or minus (binder section 5).
- **Review** benchmarks bi-weekly with the associate.
 - Always have the associate share their own pluses and minuses first, then compare. Align on the final number of pluses and minuses.
 - Use this time to coach and build a development plan, if needed, on minuses.
 - Set new benchmarks to measure the monthly traits against.
 - At the beginning of months 2 and 3, if needed, determine a maximum of 2 traits to evaluate and build bi-weekly benchmarks.
- **Close the circle** at the end of the evaluation.
 - Score the 2-3 traits with an overall plus or minus, and review with the associate.
 - Determine next steps
 1. Build development plan.
 - Associate has improved or shown room for growth and additional development is needed.
 2. No follow-up needed.
 - While working with the associate, during the evaluation, they got back on track and/or were determined to not need additional development at this time.
 3. Terminate
 - Determined that The Connor Group and associate are not a long-term fit.
- Evaluation documents must be put in their digital personnel file bi-weekly

Evaluations should be done in 30-day increments over a maximum of 90 days. If you are confident that you have enough evidence to plus or minus the trait before 90 days, then end the evaluation.

LESSONS LEARNED

As leaders at The Connor Group, you are expected to execute the process and correctly evaluate 3 out of 4 associates. No leader at The Connor Group will be rated an 8.25 or above if he/she can not correctly evaluate.

LESSONS LEARNED

- This process takes more time than initially anticipated. To execute the process correctly and effectively you can't do too many at a time.
 - Recommend 2 at a time, maximum of 3.
 - You need to schedule specific, dedicated time.
- Bi-weekly and monthly meetings need to take place in-person minimally 75% of the time.
- Define each trait.
 - Give the associate a copy of the traits to evaluate (Section 4, Page 1).
- Need clear, specific benchmarks.
- Allow them to self-assess their benchmarks and traits first.
- Give bite-sized, actionable feedback.
- Done correctly, this can build huge trust and credibility.
- Don't forget to reward & recognize along the way; celebrate the small wins; let them feel good about it.

COMMUNICATION AND COACHING

Communication and alignment are important. How you introduce the start of an evaluation and communicate throughout will be a key factor in the outcome.

How do we Deliver the Message:

- Schedule a face to face meeting with the associate to communicate the purpose and objective of the evaluation.
 - Keys to an effective conversation:
 - Get them to engage in the process.
 - Approach should be to help them get better.
 - Identify root problems and solutions together.
 - It's all in the delivery, approach, and language.
 - Examples of language when starting the process:
 - “The goal is to help you improve, become more effective, and hit your goals. I’m committed to your development and want to help you be successful.”
 - “ ‘Measurement Improves Performance.’ For me to help you, we need to accurately and honestly assess your pluses and minuses, and specifically address where and how you can improve and grow.”
 - “We’ll do this together. It’s a two-way conversation. I want to know how you evaluate yourself and I’ll let you know how I rate your performance. It’s important that we both be specific, and evidence based.”
 - (If the associate is off-track) “ You’re not at standard for ‘XYZ’ (give specifics). Together we will accurately diagnose the problem and come up with a very specific plan for you to follow so we can get you back on track.”
- Remember: Your tone should be positive, helpful and encouraging. At this stage you are the coach helping the player in a cultural way.

Coaching and Evaluation Meetings:

- Meet in person bi-weekly to review benchmark pluses and minuses and how they are tracking to their monthly traits.
 - Have the associate score pluses and minuses first. If there are minuses, help them build a plan to improve.
 - Remember, if they are off track, the idea is to help them get back on track!
- At month end, summarize the overall pluses and minuses against the traits.
 - Identify month 2 traits. At least one trait needs to be different than month 1.
 - Build new bi-weekly benchmarks.
- Repeat this process in months 2 and 3, if needed.
- **No secret documents.** Make sure the individual has access to everything being documented related to their evaluation. These documents **must** be put in their digital personnel/evaluation file.

What Should you be Looking For?

- Are they open to feedback? Do they respond positively?
- Do they own the evaluation? If it is negative, do they agree?
- How they respond, their body language, and if they make excuses.

Keys to Effective Coaching

- Discuss both pluses and minuses.
 - Example:
 - Start with asking the associate what they are doing well on a factual basis.
 - Next, ask where they need to improve.
 - If not aligned, ask probing questions to understand perspective and help them to align with coaching, developing, and evaluating.
- Be actively engaged.
 - Example:
 - Have the associate recommend traits, criteria, and/or benchmarks to evaluate and measure.
 - Help the associate by coaching during bi-weekly meetings. Within 6 weeks you will have a trend. Take corrective action through coaching and development.
 - If the associate is not engaged, you either did not get their buy in to the evaluation or they do not want to accept feedback.
 - The associate being evaluated needs to **participate** in the process. They should be talking/participating 30-40% of the time.
 - If you both are not engaged the evaluation will not be successful.

TRAITS TO EVALUATE

Three Most Common Traits to Evaluate:

- **Accountability**
 - **Self-accountability:** Believes that they alone are responsible for their performance and outcomes. Does not make excuses, blame others or “circumstances” when they fall short.
 - **Ability to hold others accountable:** Provides specific and very clear expectations. Provides clear and direct feedback to others about their performance and progress, both good and bad. Does not sugarcoat the message but does not tear the person down either. Factual and analytical vs. emotional.
 - See Section 6, page 1: Example – Accountability.
- **Organization and Multitasking**
 - Demonstrates the discipline and focus to stay organized, on-task, meet deadlines, and complete work correctly.
 - A need and ability to structure time and environment to ensure closure, completeness, and organization. The ability to have and maintain a consistent direction , which includes both short term priorities and long-range goals.
 - See Section 6, page 1: Example – Organization.
- **Ability to Motivate/Inspire**
 - Can create followers – people want to work hard for him/her. Communicates in a way that generates positivity and excitement for working towards a goal or objective. Especially elite goals (some might think “impossible”) that are significant and bold and where the outcome is far from certain.

Additional Traits to Evaluate:

- **Problem Solving**
 - Can go below the surface to correctly diagnose the core of a problem and then implement specific steps to resolve/fix.
- **Ability to Evaluate People**
 - Able to correctly rate/score people on the areas that determine how good a job they’re doing. Knows the difference between what can be taught and what can’t. Understand the three C’s, Culture, Competency, Commitment.
 - Per our system.

- **Financial and Business Acumen**

- **Financial Acumen:** Likes numbers/data. Quick with numbers/math. Data/evidence driven (vs. gut/emotion). Can see trends and patterns in data and anticipate future outcomes.
 - Trend analysis.
- **Business Acumen:** Understands how the various components of the business (people, sales management etc.) fit and work in relation to each other.

- **Sales/Sales Management**

- Likes and believes in Sales and the sales process are key drivers of growth. Understands and is interested in the psychology of selling – how to influence people and get them to buy. Understands most people avoid decisions and closing them is helping them. Enjoys managing salespeople and understands how to work with and motivate them.

- **Technical Capability**

- Does the individual possess the necessary knowledge, skills, and experience to correctly execute their responsibilities?
 - When measuring technical capability, must have **very specific** criteria, depending upon position responsibility.

This is not a complete and definitive list of traits. Depending on the associate's role, other traits can be selected.



TRAITS TO MEASURE DURING THE EVALUATION

MONTH 1 | MONTH 2 | MONTH 3

Pick **one or two** traits each month to focus on and measure against. Depending upon results, you could use one or both in month 2 or month 3.

	Total +/-
1.	_____
2.	_____
3.	_____



WRITING EFFECTIVE BI-WEEKLY BENCHMARKS

After establishing the monthly traits, create bi-weekly benchmarks.

When building bi-weekly benchmarks, make sure they:

- Align with the trait you are measuring.
- Are specific and measurable.

EXAMPLE

- **Trait:**
 - Ability to hold others accountable.
- **Incorrect Benchmark:**
 - Complete a DPM with Sally daily (administrative).
- **Correct Benchmark:**
 - Complete a DPM with Sally daily, Sally achieves daily objectives 4/5 days.

EXAMPLE

- **Trait:**
 - Planning and organization.
- **Incorrect Benchmark:**
 - Plans 80% of time in planner, pinks and yellows (administrative).
- **Correct Benchmark:**
 - Plans 80% of time in planner before 10:00 am, completes 80% of General Manager tasks on correct day.

EXAMPLE BENCHMARKS FOR DEPARTMENT HEADS

The below benchmarks are for Department Heads. Each month, pick 4-6 Benchmarks to measure against.

	+/-
Accountability:	
• They Demonstrate understanding, belief, and consistency in executing the Circle of Success with direct reports. Specifically, clear expectations, measurement, accountability, and reward & recognition, or consequences. (Could also be used for motivate and inspire)	_____
• Achieves specific monthly objectives. (Could also be used for organization / multi-tasking or motivate and inspire)	_____
• Demonstrates the ability to clearly communicate expectations and hold people accountable to measurable monthly / weekly standards. Does so in an honest, direct, and constructive manner.	_____
Organization and Multitasking:	
• Completes projects and assignments correctly and on-time. (Could also be used for accountability)	_____
• Prior to the 25 th of the month, can organize and prioritize correctly their next month's tasks, responsibilities, and objectives. Sticks to the plan.	_____
Ability to Motivate and Inspire:	
• People trust this individual and want to do a good job for them.	_____
• Consistently demonstrates the ability to energize and motivate a team. Can point out and show specific ways they did so.	_____
• Demonstrates consistently the willingness and ability to work side-by-side with any of their direct reports to coach, develop or evaluate. (Could also be used for problem solving)	_____
Problem Solving:	
• Can consistently identify root problems and act with specific, correct solutions.	_____
• When faced with problems, obstacles, or adversity, how do they respond? Is it positive, can-do, find a way; or do they talk about the problem?	_____
Ability to Evaluate People:	
• Utilizes the trained techniques and system to coach, develop, and evaluate people. Evaluations are completed on time and accurately for 3 out of 4 people. Leads to specific, corrective actions.	_____
• Possesses the knowledge, skills, and experience to correctly direct, evaluate, and identify any problems in their department. Can coach and train people on department technical necessities. (Could also be used for accountability, problem solving, and developer traits)	_____
Technical Capability:	
• Demonstrates the necessary or appropriate technical capabilities for their specific job responsibilities.	_____

Other benchmarks can be utilized. If adding other benchmarks, they must be **very specific** and **measurable**.

EXAMPLE BENCHMARKS FOR SMTs

The below benchmarks are for SMT's. Each month, pick 4-6 benchmarks to measure against.

	+/-
Accountability:	
• 75% or properties achieve their approved rental goal with properties at 80% of UTP% achieved.	_____
• DQ System executed at an 8.0 and 7 out of 8 properties achieve goal.	_____
• Managers execute the move out process at an 8.0 and market scores 3.80+ on move in experience for the last 30 days.	_____
Organization and Multi-tasking:	
• Prior to the 25 th , can correctly prioritize their time allocation to complete and achieve their tasks and objectives 80% of the time.	_____
• Meets deadlines 90% of the time.	_____
• Plans and communicates weekly schedule to market by Thursday, and sticks to the plan 90% of the time.	_____
Ability to Motivate and Inspire:	
• 90% of their direct reports trust the individual and want to achieve their tasks and objectives.	_____
• Can execute a market incentive to achieve both renewal and approved goals. With 75% of properties achieving.	_____
• Works with manager to execute save strategy in off track renewal books and achieve impossible renewal goal.	_____
Ability to Evaluate:	
• Can identify and correctly evaluate 3 out of 4 associates within 90 days.	_____
• Can determine competency or commitment of an associate within 30 days with specific evidence.	_____
Sales / Sales Management:	
• 75% of properties achieve renewal goal, 90 day books at 50%.	_____
• Work side-by-side with GM to improve closing to 25% and achieve approved rental goal.	_____
• Work with manager on how to build urgency into email follow up and improve email conversion to 40%	_____
Problem Solving:	
• Can correctly identify root problems and create the correct specific solutions within 30 days.	_____
Business / Financial Acumen:	
• Can correctly identify positive and negative trends on each one of their properties.	_____

Other benchmarks can be utilized. If adding other benchmarks, they must be **very specific** and **measurable**.

EXAMPLE BENCHMARKS FOR GENERAL MANAGERS

The below benchmarks are for GM's. Each month, pick 4-6 benchmarks to measure against.

+/-

Accountability:

- Turn tech achieved weekly turn objective with 3 or less blue tapes per turn. _____
- Manager correctly executes weekly IAM with specifics on what they are doing well and what they can improve. Associate achieves 3 out of 4 weekly objectives. _____
- White glove(s) completed with Sales Associate daily before 10:30am, and unit is moved up on availability. White glove checklist is sent to SMT for any unit not rated at an 8.25. _____
- Manager executes reward or consequence as part of weekly IAM. _____

Organization and Multitasking:

- Creates correct weekly plan in planner by Friday at 10:00 am and achieves 80% of GM Tasks. _____
- Creates daily plan in planner by 8:30 am and communicates to team during DPM. Executes 80% of planned time. _____
- Can adjust priorities and focus areas daily to the needs of the business and achieve 75% of stat sheet goals. _____

Ability to Motivate and Inspire:

- Demonstrates the ability to work side-by-side with sales and service to achieve a specific goal. _____
- Sales and service trust this individual and achieve weekly goals 80% of the time. _____
- Leads individual DPM's daily. Sets plan and motivates associate to achieve individual goals 4 out of 5 days. _____

Sales / Sales Management:

- Helps build and implement 90 day save strategy and book finishes at 50% renewed. _____
- Assigns 1st up on phones daily. Phone shops associates converting below 60% with them and gives feedback. Role plays to recertify. Property converts phones at 60% month to date. _____

Problem Solving:

- Utilizes stat sheet daily and weekly to identify root problems and create specific solutions so that property achieves 80% of their goals. _____
- Physical Facility rates a 7 and you no longer have a grounds person. Using your lead and turn tech Physical Facility must rate an 8.0 by month end. _____

Other benchmarks can be utilized. If adding other benchmarks, they must be **very specific** and **measurable**.

Name: _____

Date: _____



9/26/24

4-6 BENCHMARKS TO MEASURE

+/-

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

**MEMORANDUM****EXAMPLE**

TO: Olivia Connor

CC: Direct Supervisor, Amy Admin

FROM: SMT

DATE: July 28th, 2024

SUBJECT: 90 Day People Coaching - Developing - Evaluating

Olivia,

In the last 6 months Connor Tree missed its renewal goal 4 times, its approved goal 5 times, and is now off track to achieving the target revenue set for September. You have also turned 3 tenured associates in the last 6 months. We must act with urgency to determine what the problem is and build plan to get back on track.

I will allocate 1 day a week to work side by side with you to evaluate the cause and help provide solutions. We will evaluate you weekly using benchmarks that we measure with a + or -. We will identify 3 traits and build benchmarks during your property visit next week.

Thank you,

SMT

Date: 8/1/2024



TRAITS TO MEASURE DURING THE EVALUATION

EXAMPLE

MONTH 1 | MONTH 2 | MONTH 3
(Select one)

Pick **one or two** traits each month to focus on and measure against. Depending upon results, you could use one or both in month 2 or month 3.

	Total +/-
1. Ability to motivate team	_____
2. Sales Management	_____
3. Holding others accountable	_____

Name: Olivia Connor

Date: 8/1/2024



BENCHMARKS TO MEASURE BI-WEEKLY

EXAMPLE

+/-

1. Sally achieves $\frac{3}{4}$ objectives on IAM Weekly, leads effective plan the achieve goals. _____
2. Leads individual DPM's with sales team daily. Sets a plan and motivates the associate to achieve their daily goals. Sally and Sandy hit daily objectives 4 out of 5 days. _____
3. Property phone conversion at 60%. Any associate not at 60% phone shop 2 calls in sales management time and roleplay. _____
4. 3 Hours of sales management time scheduled in planner daily. Put in writing a b-back strategy with any associate not closing at 25%. _____
5. Renewal time scheduled and pinked in planner daily at DPM. Sally closes at 50% on UI or you shadow next renewal. _____
6. Save strategy execution daily for 90-day book and boon ends at 50% by 8/15/24 _____

**MEMORANDUM****EXAMPLE**

TO: Olivia Connor

CC: Direct Supervisor, Amy Admin

FROM: SMT

DATE: November 1st, 2024

SUBJECT: 90 Day People Coaching - Developing - Evaluating - Completion

Olivia,

Over the last 90 days we evaluated your ability to

- Motivate your team
- Sales Manage
- Hold your team accountable.

You have shown you can motivate your team and effectively sales manage. You have achieved your approved and renewal goals in both September and October.

We determined that you were not holding your team accountable. Over the last 90 days you have shown you can hold your **sales** team accountable. However, your lead tech is not meeting productivity standards and is over budget on repair and maintenance.

We will meet on Tuesday November 5th to create a 60-day strategy. The objective is to develop your ability to effectively manage your tech to execute both the Onewrite and Inventory processes.

Thank you,

SMT



MEMORANDUM

EXAMPLE

TO: Danny Department Head

CC: Direct Supervisor, Amy Admin

FROM: Eddie Evaluator

DATE: August 28th, 2024

SUBJECT: 90 Day People Coaching - Developing - Evaluating

Danny,

You have now been here in role as the head of the marketing department for 90 days.

As you develop in your role I will be evaluating you on the following traits over the next 90 days.

- 1) Ability to hold others accountable
- 2) Planning, Organization, and Multitasking

In September I will be evaluating your ability to hold others accountable, planning, organization and multitasking.

Thank you,

Eddie Evaluator

Name: Danny Department Head

CASE STUDY – DEPARTMENT HEAD

Date: 8/28/2024



TRAITS TO MEASURE DURING THE EVALUATION

EXAMPLE

MONTH 1 | MONTH 2 | **MONTH 3**
(Select one)

Pick **one or two** traits each month to focus on and measure against. Depending upon results, you could use one or both in month 2 or month 3.

Total
+/-

1. Ability to hold others accountable.

2. Planning, Organization and Multitasking

Name: Danny Department Head

Date: 8/28/2024



BENCHMARKS TO MEASURE BI-WEEKLY EXAMPLE

+/-

- | | |
|--|-------|
| 1. 3 out of 4 associates achieve weekly objectives through effective IAM's utilizing the circle of success. | _____ |
| 2. Achieves 100% of deadlines by utilizing planner daily, pink and yellow | _____ |
| 3. Achieves 3 out of 4 Department objectives in weeks 1 and 2 by correctly prioritizing in planner daily. | _____ |
| 4. Sets correct weekly objectives on associate's IAM. Associates achieve daily goals 4 out of 5 days per week to achieve weekly goals. | _____ |
| 5. Effectively plans week by Friday at 9:00am . prioritizes and sets next week's objectives. | _____ |

**MEMORANDUM****EXAMPLE**

TO: Danny Department Head

CC: Direct Supervisor, Amy Admin

FROM: Eddie Evaluator

DATE: October 28th, 2024

SUBJECT: 90 Day People Coaching - Developing - Evaluating - Completion

Danny,

Over the course of your evaluation, we were able to determine you have the ability to plan, organize and multitask by achieving 100% of deadlines and correct use of planner. You also held your team accountable by achieving 4 out of 5 department objectives in September, and 5 out of 5 objectives in October.

We will meet on November 5th to create a development strategy for your role.

Thank you,

Eddie Evaluator