

Check It Out

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Performance Management

DEFINITIONS

An ongoing process of **communication** between a supervisor and an employee that occurs throughout the year, in support of accomplishing the strategic objectives of the organization.

A process that provides **feedback**, accountability, and documentation for performance outcomes. It helps employees to channel their talents toward organizational goals.

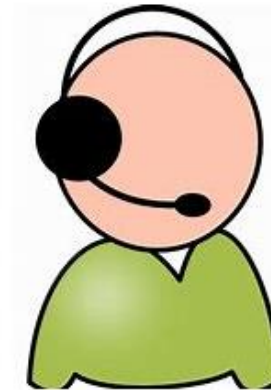
More than just an annual performance review, performance management is the continuous process of setting objectives, assessing progress and providing on-going **coaching** and feedback to ensure that employees are meeting their objectives and career goals.

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KEY PLAYERS



Manager



Employee

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What's a major **challenge**?

The **Manager**



ACTIVE
management
participation

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What happens in the **absence** of communication?



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So how can HR support this need for communication?



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What does this mean?

1. Find out what is going on.



2. Ask questions.



3. Have a dialogue.



4. Come from a position of wanting to understand.



5. Suspend assumptions.



6. Actively listen.



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Completed by (Manager):

Conversation with (Employee/Position):

Date of Conversation:

Purpose: To support manager / employee conversations with the intent to obtain information and support workplace productivity and professional development.



Step 1 BEFORE THE CONVERSATION		
What needs to be checked out (what is the situation, what did I observe, what did I learn from others):		
Step 2 BEFORE THE CONVERSATION		
What questions will assist in obtaining information to get a clearer picture:		
Step 3 DURING THE CONVERSATION		
Employee provided the following response(s):		
Step 4 AT THE END OF THE CONVERSATION		
Part A. I need to obtain additional information, such as: <hr/> <hr/> <hr/> <hr/> <hr/>	OR	Part B. Given the information I have available to me now, it would be reasonable to conclude:
 Step 5 CONSULT WITH HR ON NEXT STEPS		



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TIPS FOR A PRODUCTIVE CONVERSATION

BEFORE THE CONVERSATION

Step 1

- Don't delay conversation – purpose of conversation is not to punish employee. You want to get an accurate understanding of the issue and ultimately support high performance.
- Include bullet points that clearly illustrate what you observed or learned from others. The more you can provide examples, the better the employee will understand and be able to respond.
- Suspend judgment – there are always two sides to every story.
- Schedule conversation to be held in private location.

Step 2

- Prepare for conversation – write out questions in Step 2.
- Ask open-ended questions that require more than a “yes” or “no” answer. Consider asking “who, what, when, where, why”.
- Avoid asking leading questions.

DURING THE CONVERSATION

- Avoid the urge to minimize the importance of the conversation by skirting around the issue, diluting the potential performance gap (e.g., *'this is really no big deal'* OR *'I've done this myself'*), or misrepresenting the situation because addressing it head on may be uncomfortable.
- Stay open-minded - Your intent is to obtain the full picture of the facts *before* coming to a conclusion.
- Allow for 2-way dialogue – Employee's input should help define the full picture.
- Actively listen (e.g. body language, focus on employee).
- Take notes in Step 3.
- Solicit solutions – ask employee how they believe the situation *can be improved*.
- Offer support – ask employee what needs they may have to demonstrate improvement (training, resources, information, coaching, etc.).
- If the employee becomes upset, use a break to allow time for them to compose themselves. This should normally mean the discussion *can* continue after a short break.

AT THE END OF THE CONVERSATION

- Take into account any mitigating circumstances – especially those that may be outside of the employee's control.
 - If additional information is needed:
 - List additional information needed in Step 4 – Part A,
 - Commit to obtaining additional information and identify timing when you and employee will resume conversation, and
 - Obtain additional information.THEN, **STOP** and consult with HR for next steps.
 - If all needed information is available:
 - Insert conclusion from conversation in Step 4 – Part B and
 - Close conversation with employee saying “I would like some time to review the information you've shared and will reconnect with you in the next day or two”THEN, **STOP** and consult with HR for next steps.