

## Members Quarterly

Fall 2015 Edition

### Feature

# Mastering the Art of Performance Reviews

*Make them productive and powerful*

Over the years managers have used the Performance Review process as a time for discipline and correction. Repeated bad habits and behaviours have caused people to dread the whole process. Not just those being reviewed, but the managers as well. We need to change that view. Everyone needs to realize that the Performance Review is a time to coach:

- Evaluate the present performance
- Create a clear plan of action to improve the performance
- Set goals for a better future

Micki Holliday, in the book *Coaching, Mentoring & Managing* says, "How do the great managers like Tommy Lasorda inspire and develop their people? One word: process. They don't coach or counsel, mentor or teach and say, 'Okay, now that's done'. They see coaching as a performance process with lots of steps and actions that goes on continuously."

As a Human Resources Manager, I noticed that the process starts the first day they arrive and it goes on until the day they retire. When we do a great job of managing them (coaching them), they stay, they prosper and we all benefit.

**Step 1: Clearly identify the education, experience, character traits and skills for every position.**

Use information from your managers and your existing star employees to determine the ideal candidate for a job. Document and chart the information to use when hiring and also when training people for promotion.

**Step 2: Hire the right person into the right job.**

- Study their resume.
- Call their references.
- Interview in detail, asking behavioural questions.
- Do practical tests for computer skills, problem solving and business knowledge.
- Check technical skills, knowledge of trade and industry.
- Relate responsibilities of position.
- Do they have concerns about the responsibilities?
- What skills and talents do they think they have?
- What skills and talents does the job require?
- How can you make them a better match?
- Are some of their talents and skills being wasted?



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#### **Step 3: Have an established process of orientation.**

Orientation is the formal process of familiarizing a new employee with the organization, the new job and the new work unit. It enables new employees to get "in sync" so they start to become productive members of the organization.

Studies have shown that the more time and effort an organization devotes to making new employees feel welcome, the more likely those employees are to identify with the organization and become valuable members of it.

Unlike training, which emphasizes the *what* and the *how*, orientation stresses the *why*. It is designed to develop in employees a particular attitude about the work they will be doing and their role in the organization. It explains the philosophy behind the rules and provides a framework for job-related tasks. Orientation is a team effort between the HR department and the line staff.

In addition to formally introducing them to their colleagues, explain job procedures, duties, expectations regarding -attendance and behaviour, job standards and production/service levels. Discuss safety regulations, chain of command, reporting problems, issues and questions. You should also be telling them when the Performance Reviews will be done.

#### **Step 4: Keep their file up-to-date.**

After four weeks, review the responsibilities of the position and find out how they are doing. Ask the following questions: "What do you enjoy the most about your job?" "What are you feeling really good about?" "What has been working well for you this month?" "Do you feel challenged by the responsibilities of your job?" Elicit the negatives too. "Are you concerned about any of the responsibilities of your job?" "What are you not feeling good about?" "What can I do to make things easier?"

Get feedback from the people they work with. Always watch closely, listen intently and offer encouragement. Make notes for their file so you have references during their performance reviews.

There are a number of issues that should be dealt with immediately and documented for future reviews. Take note of the following: attendance, tardiness, leaving early, violation of company policy, insubordination, substandard work, carelessness, failure to follow instructions, violations of safety rules, uncooperative, willful damage of equipment or material and rudeness to a customer or fellow employee. Write down in detail the specifics and have the employee sign the form.

Other Items that will be in the Employee File ready for a review: WSIB Forms, letters from doctors and Subsequent Forms (Functional Abilities Form).

Include notes regarding phone conversations, Vacation Request Forms, possible -training ideas, Leave of Absence Requests and their Career Tracking Tool.

#### **Step 5: Schedule the Review.**

Your success depends on how you make them feel. Maya Angelou said, "I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel."

Scheduling:

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Schedule the review and notify the employee ten days in advance.

Ask the employee to prepare for the session by reviewing his or her performance, job objectives and development goals.

Clearly state that this will be the formal annual performance review.

Preparing for the Review:

Review the correspondance collected throughout the year.

Concentrate on work habits that have developed.

Be prepared to give specific examples of above or below-- average performance.

When performance falls short of expectations, determine what changes need to be made.

If performance meets or exceeds expectations, discuss this and plan how to reinforce it.

Prepare yourself ... get into a good frame of mind.

During the review, be positive about the future clearly stating plans to improve performance.

I challenge you to treat your performance reviews as an opportunity to COACH your team to success and to help each one of your employees to rise to their best performance.

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