Reimagining Performance Management

SUPERVISOR TRAINING

March 2022
Today’s goals

• The value of effective performance management

• 3 components of performance management

• Writing and delivering high quality performance reviews

• Whitman’s new performance management model

• Timeline of performance management process

• Using BambooHR for performance management
Performance Management is a PROCESS, that:

• Involves communication between a supervisor and an employee
• Is ongoing
• Ensures the work we do is in support of accomplishing the goals of our department
• Helps employees fulfill their potential
The dreaded annual performance review

• It takes time & effort.
• They are often overly complicated.
• “Formal” feedback can be scary and anxiety-producing.
• It is frequently out of context because of lag time.
• Often supervisors don’t feel like they can prioritize performance management.
Annual reviews are losing relevance

• Fewer organizations are using annual reviews:
  • 2016: 82%
  • 2017: 65%
  • 2018: 58%
  • 2019: 54%

• Effective feedback is:
  • timely,
  • frequent, and
  • a continuous process
  • that engages employees.
Good performance management adds tremendous value

• Strengthens an organization’s culture & reinforces values.
• Helps satisfy employees desire to grow & develop.
• Improves communication between employee & supervisor.
• Aligns an individual’s work with the team and the organization.
• Shows supervisors care about employees and appreciate them.
3 components of effective performance management

1. Departmental core values & priorities that drive our work

2. Assessing performance
   - Performance assessment
   - Feedback from others
   - Ongoing conversations between supervisors and employees

3. Goal setting
Departmental core values & priorities

• Values should serve as our guiding compass for every employee’s work.
• Supervisors must define, discuss often, & model how our work and job functions live out the department’s core values.
• All work must align with values.
Assessing performance

(1) ASSESSMENTS
• Employee self-assessment
• Assessment by supervisor

(2) FEEDBACK FROM OTHERS
What should assessments measure?

PERFORMANCE
• Measures where someone has been and where they currently are.

ENGAGEMENT
• Understanding engagement helps make sense of the future.
Writing an effective performance assessment

• Make sure you are in the right time & mental space to write the review.
• Embrace that the best assessments are the simplest.
• Give positive feedback first.
• Be very specific & offer concrete examples.
• Consider how to frame each set of feedback – evaluating, appreciating and coaching.
• As you review the assessment, ask yourself if you have created any surprises.
Writing an effective performance assessment

REVIEW & CHECK FOR BIAS

• Do not use assumptions or judgements.
• Run a consistency check.
• Give yourself a word range.
• Is my feedback related to performance or is it personality-based?
• How might this feedback be shaped by my own culture and background?
Effectively delivering a performance review

• Be prepared & communicate expectations.

• Remind yourself:
  • Feedback involves care and trust.
  • Delivering an effective performance appraisal can lead an employee to feeling listened to and supported.

• Make it conversational & start with the employee.

• Timing is everything.
Effectively delivering a performance review

• Show genuine gratitude.

• When providing constructive criticism, focus on the issue and use this as an opportunity to collectively problem-solve.

• Seek first to understand, then to be understood, and recognize that you might be wrong!
Effectively delivering a performance review

• Don’t hesitate to pause and reconvene.
• Be prepared that the possibility exists for an employee to not receive constructive feedback well.
• Invite the employee to raise any final items.
• Summarize, express confidence, and document.
Feedback

• Feedback from others creates the opportunity to put together the whole picture.
  • Team members
  • Peers
  • Supervisees

• It is important for feedback to be given anonymously.
Setting goals

• Goals should be established collectively.
• Make sure goals align with core values, priorities, and areas that need improvement in performance and/or engagement.
• Find ways for goals to leverage employee strengths & talents.
• Document.
Setting goals

Make sure goals are SMART:

• Specific
• Measurable
• Attainable
• Relevant
• Time bound
Whitman’s new performance management model

1. Assessment
   - Self-assessment
   - Supervisor assessment

2. Performance review conversation

3. Feedback invitation
   - Feedback from 1-10 other employees (make sure to include employees of supervisors)

4. Goal-setting

5. Ongoing one-on-one conversations to share peer feedback & monitor performance, engagement, and goal progress.

6. Repeat (every 4 months).
Timeline

• Apr. 1: Assessments go live
• Apr. 1 – Apr. 30: BambooHR sends email reminders
• May 1: Assessments close
• Month of May: Performance review conversations
• May 16 – May 29: Supervisors will be prompted to invite feedback
• May 16 – June 12: Employees provide feedback of others
• June & July: Continue working peer feedback & goal monitoring into regular one-on-one meetings
• July: Gather feedback
• Aug. 1: The process begins again!
Self-assessment
Self-assessment

Hi Jenn,

Charlotte Abbott completed the Self Assessment. You must first complete your assessment of Charlotte before you see Charlotte's Self Assessment.

Why, you may ask? Well, having employees and managers complete their part of the Assessment prior to revealing them facilitates more meaningful dialog. It creates the opportunity to have a worthwhile discussion around performance rather than simply reacting to the Self Assessment.
Supervisor assessment
Feedback from others
Feedback from others
Feedback from others

Performance

Goals  Feedback  Assessment

01/01/2019  01/29/2021

Just so you know, feedback is hidden from Charlotte.

It's time to request feedback about Charlotte
- Select:  Send Request

Olivia Sterling
Founder and CEO
Dec 26, 2019 at 9:22 AM

What are some things Charlotte does well?
Charlotte is very professional and does a great job of forming relationships with employees. You can tell employees really trust her and feel comfortable going to her when an issue comes up.

How could Charlotte improve?
Charlotte has a hard time delegating tasks, which can sometimes bring unnecessary stress. She could work harder to evenly distribute the work and work more collaboratively as a team.
Goal setting

Performance

New Goal

Increase retention by 5% before the end of Q1

Aligns with: Review Performance results and share with the C-Suite
Research trends in terminations and deep dive into ways we can improve.

Olivia Sterling
Jan 23, 2020 at 10:25 AM
Can you please give me an update on this by the end of January?

Add Comment
Goal setting

Add a New Goal

Your New Goal

mm/dd/yyyy

Short description of what you will accomplish and how.

-Goal Alignment- (Optional)

Save  Cancel
Goal setting

Performance

**Goals**

- **New Goal**

**Increase retention by 5% before the end of Q1**

- **Aligns with:** Review Performance results and share with the C-Suite
  - Research trends in terminations and deep dive into ways we can improve.

- **Status:** In Progress

- **Olivia Sterling**
  - Jan 23, 2020 at 10:23 AM
  - Can you please give me an update on this by the end of January?
Helpful resources

**BambooHR Guides**: Whitman/edu/human-resources (under Hiring Managers & Supervisors)


