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Performance management: 3 basic guidelines to getting it right

When you hear the terms “performance management,” “performance appraisal” or “performance evaluation,” what is your response? Feedback from one of my recent clients was, “It’s a joke!” His situation was so horrendous it enticed me to write this editorial on performance management and the process.

Let’s begin with some definitions: (a) *performance management* — the continuous process by which supervisors and employees work together (as much as possible) to plan, monitor and review an employee’s work deliverables. The process also involves ongoing feedback and coaching to ensure the achievement of those deliverables. *Performance appraisal/evaluation* — an overall review/analysis of an employee’s performance with additional comments by the supervisor. The appraisal/evaluation is usually conducted annually or semiannually. Many employees sarcastically refer to this process as “the form.” Additionally, in numerous organizations, employees are also required to complete the process based on an assessment of their performance during the specified timeframe. The point being is to help identify gaps between the employee’s self-perception and the supervisor’s views.

In this issue, I’ve chosen to discuss performance management, the process, its importance and three basic guidelines that can lead toward increasing performance and fostering employee development and motivation. The fundamental goal of performance management and its central importance should be to pro-

vide and improve employee effectiveness. Consider the following three basic guidelines:

Guideline 1 — Planning

This phase should be a collaborative effort involving both supervisor and the employee and should include:

- A review of the job description to determine if it properly reflects the work the employee is currently performing. As appropriate, the job description should be updated to indicate any changes.

- Create a plan that outlines the deliverables that are critical to the overall success of the employee’s position, the expected results and the standards to be used to evaluate/measure the employee’s performance.

- The supervisor and the employee should both sign off on the proposed plan, a copy given to the employee, and one maintained in the employee’s personnel file for future reference.

Guideline 2 — Monitoring

An employee’s performance and progress should be continually monitored if the performance management process is to be effective. This does not mean day-to-day, over-the-shoulder micromanagement but regularly observing performance, reviewing task/project results and paying attention to overall workplace behavior and team interaction. Strategies to apply involve the following:

- Provide positive feedback for a task well done (a great motivator) as well as constructive feedback when im-

provement is needed.

- Identify areas of poor performance or concerns; meet with the employee to establish plans for improvement; and coach to provide guidance, direction and support.

- Make sure feedback provided to employee is specific, frequent and as close to the performance occurrence as possible. Providing feedback six months down the road after the performance/concern has transpired is not helpful to the employee and can be a demotivator. This applies to both positive and constructive feedback.

Guideline 3 — Reviewing

Prior to the annual or semiannual performance appraisal meeting, which should provide an opportunity to review, summarize and highlight the employee’s overall performance (not simply talk about what the employee has not done), the following factors should be considered:

- Review performance management notes and documentation produced during the year.

- There should be no surprises during a performance appraisal meeting. All issues and concerns need to have been discussed prior to the meeting.

- Based on the original or revised deliverables/objectives plan, identify key results, accomplishments, any continuing challenges and areas for further development.

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