



Keys To Performance Management

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Emmet Ore:

Here we go. As always, this webinar is brought to you by Vensure Employer Services. Vensure is the leader of 20 plus PEO partners with clients in all 50 states. Today's agenda includes planning work/setting expectations, observing performance, providing feedback, documenting performance, periodically rating performance, and lastly, a Q&A session. You should have seen the control panel open when you enter the webinar room, there's a dropdown section there for questions. Just type your questions and comments into that section and hit enter. If you're a client please put "client" in your questions so we can track that later. Questions are private, so you won't see the questions or comments of others. And we'll try to get to all the questions you have in the time that we have. But if we don't, please contact webinarHRhelp@vensure.com. We're thrilled, as always, to have Robin Paggi joining us as our panelist today. She's a human resource practitioner specializing in training on topics such as harassment prevention, communication, team building, and supervisory skills. And with that, I'll hand it over to Robin.

Robin Paggi:

Thanks, Emmet. When you're in a position of authority, you're responsible for getting results from the employees you supervise. And today I'm going to talk about some things that you can do to help you get those results. Now, I realize that some of you who are listening are not in a position of authority. And I'm going to give you some ideas on what you can do to help yourself get better results as well. So let's go to the next slide and let's talk about the performance management cycle.

Robin Paggi:

The first step in that cycle is to plan work and set expectations. And this is more difficult than it sounds. Those of you who have been tuning in on the communication webinars that we had last month have heard me say, on several occasions, that

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the definition of communication is when the sender of the message and the receiver of the message have the same understanding of the message. So when you're setting expectations for people, it's imperative that they understand what you're talking about. And again, a lot of times we think that because people are nodding and they don't have any questions, that they know what we're talking about. And this often doesn't happen. And when people don't meet our expectations, but they think they are and then they find out that they're not, they're usually unhappy. So that's why it takes a long time to be very clear, to have mutually understood expectations. Now, one of the reasons that you're setting expectations upfront is because you are going to be evaluating people's performance. And so when you set those expectations up and say this is what we're going to be evaluating you on when it comes to your performance evaluation, then that helps them understand this is what I need to do in order to get a good performance evaluation. And I strongly encourage you when you have a new employee or somebody is promoted and you are sitting down with them to discuss performance expectations, that you show them the performance evaluation at the same time. So you can see this is what we're going to be evaluating you on and we want you to get a good evaluation. We really do. So we're going to do a lot of work to make sure you understand how to get a good performance evaluation. And we'll talk more about evaluations a little bit later on. Now, one of the reasons that we have different understandings of things is because people are different. And so one of the things that we need to ensure is that we are clarifying what our expectations are. Now I'm going to give you an example, something that if you have children that you might have done, is telling your children, clean your room. And when you go to their room to check, you might say to them, I thought I told you to clean your room. And they probably say, I did clean my room. Well, you have different definitions of what the word clean means. That happens to adults also. I coached a supervisor who was very frustrated with his employees because they would not clean. And I said, "Did you describe to them what clean means?" And he said, "I shouldn't have to, they're adults. They should know." So we shouldn't make those assumptions. Now, I like what a training participant told me that he did as far as his kids cleaning their room. He went into their room. He made their beds. He took a picture of it. He put the toys away. He took a picture of it. He cleaned the closet. He took a picture of it. And so he cleaned their room how he wanted them to clean their room, took pictures of it, put those pictures on a poster board, and then put the days of the week on the poster board. And every day he walked into their room and it was clean, according to his definition of clean, he put a little star on that day of the week. Now, if they went the entire week with a star on every day, they got a little reward. And that's one of the ways that you get your expectations met. One of the things we want to do is, again, have employees be able to identify the acceptable results. And one of the ways to identify things is when they can actually see it. So there are some tools available for you to help you clarify the results you want from other people. First of all, the job description. And when you have a new employee or somebody gets a promotion, hopefully, you're using that job description and you're going through all of the essential job duties and you're explaining exactly what you want from people according to those essential job duties. There are other things such as standard operating procedures or SOPs. An activity I like to conduct in some of my workshops on communication especially, is to have participants write down the instructions on how to make a peanut butter sandwich, and if I have 12 people in the workshop, I'll have 12 variations of how to make a peanut butter sandwich. I mean, you'll have people who say you put peanut butter on two pieces of bread and you put the slices together. OK, there's that. Then you have people who actually make a peanut butter and jelly sandwich because that's what they thought they heard me say. Then you have people who will go, well, first you go to the store and you buy this bread and then you take it home and then you get the... And so different variations. And that's one of the reasons that standard operating procedures are so important, because if you don't tell people exactly what you want from them, they'll do it in a way that makes sense to them, or they'll lookup on Google or YouTube and figure out how to do it according to what they say. So standard operating procedures help to clarify. And when you don't have them, you'll get variations of a product. For example, my first training gig about 25 years ago was at an ice cream company. And one of the things that I discovered in training with the supervisors is that they did not have standard operating procedures for making the ice cream and they had variations. For example, the ice cream that I liked best from that plant was a drumstick. And I really like the drumstick

when it had a chocolate nugget at the bottom of the cone. But sometimes I would get that drumstick and it wouldn't have as much chocolate nugget in the cone. And I would be disappointed. And I found the reason why is that how much chocolate was in that cone dependent upon who was running the assembly line that day or that shift. So there should be no variation in products. And when you do have variations, you have unhappy clients. And so that's one reason we have standard operating procedures as well as to tell people exactly what you expect of them. Another tool that you can use are job aides, and these are little visual reminders of processes. They should be easy to read. A lot of job aides that we have all over the place now is how to wash your hands. Right? So if you're watching TV, you'll see numerous commercials if you're not watching streaming. And these commercials will be about socially distancing, washing our hands, all of those types of things over and over and over. And they're very easy things to remember. Well, that's what a job aid is supposed to do. Employee handbooks should also be a tool that helps employees know what's expected of them. Unfortunately, a lot of times with handbooks people just hand them out at orientation. Employees are required to sign an acknowledgment that they read and understand the handbook when they didn't read it at all. And so that's one of the things, the handbook can be a great guide for telling employees what you expect of them before they get in trouble for violating a policy. You don't want to tell them what's expected of them after they violated policy, which leads to disciplinary action. So you want to make time to talk about what's in the handbook so employees know what their rights are, but also what their responsibilities are. Now, the thing that I like best on clarifying expectations are SMART Goals. And if you're not familiar with SMART Goals, it's an acronym and it is spelled out there. They are specific, measurable-- so it's always good to have a number in there so you can measure-- attainable, relevant to what the organization is doing-- relevant to helping the organization be successful, not just busywork-- and time-based. Now as a training and development specialist, I set some SMART Goals for myself, so one was to generate ten thousand dollars in revenue every month. Is that specific? Yes. Is it measurable? Yes. Ten thousand dollars. Is it attainable? Right now, it's not, no. Before COVID it was attainable. Was it relevant to what we're trying to do for an organization? Well, yes, we need to generate revenue in order to continue to provide webinars to you. And was it time-based? Yeah, it was every month. So SMART Goals don't have to be long, drawn-out, complicated. Just one sentence will do. It just needs to meet all of those criteria. And if things change and the goal is not attainable, then employees can't be held accountable for meeting those goals. And when they are still held accountable for meeting unattainable goals, we have a perfect example of what happens when goals aren't SMART. This happened at Wells Fargo Bank a few years ago. You might remember that Wells Fargo employees, their customer service reps, had to make certain sales goals and those sales goals is that each client of Wells Fargo needed to have five separate accounts. Now you have your checking, you have your savings. What else do you need? Well, sometimes you need a loan and sometimes you have your CDs or what have you. But a lot of times you people don't need five different accounts at their bank. And so the service reps couldn't persuade people to open up five different accounts. And so, according to numerous news sources, they made bogus accounts. And so they charged people for these accounts. And now do you really look at your banking statement that much? And so people were being charged for these bogus accounts without knowing about it, because of not paying close attention to their banking statements. So this became newsworthy and lots of people got fired for simply trying to keep their job, because the thing is that if they did not meet the sales goal, they were disciplined or terminated for it. And here's the other thing. If they did meet the sales goal, they were rewarded for it. So this is a perfect storm to encourage employees to behave badly. And we can't we can shake our heads disapprovingly at Wells Fargo and its former employees, or we can understand a fundamental fact about human behavior, which is if goals are unrealistic, but you can achieve them by cheating, people will cheat. They will commit fraud to obtain the incentive or to keep their jobs. So goals are good to have. Many people are very motivated by goals, but you want to make sure they meet those criteria. Now, if you're an employee and you don't have these tools available to you, I encourage you to ask for them. If you do not understand what's expected of you, I encourage you to ask about it. You don't want to think you're going along and meeting expectations and find out that you're not or know that you're not meeting expectations, but not know what to do about it. So that's what your supervisor is there for. All right. Let's go on to our next slide.

Now, once you have set expectations, you send the employee off to do their job and then you observe their performance, so let's go on and see the different types of observations.

There is direct observation, and that's when you're working side by side with the employee and you can actually see what they're doing. A lot of people can't do that, especially right now when a lot of people are working from home. And so direct observation is really the least of ways that people can observe performance. Mostly, people are able to observe their employees' performance by the things they produce: reports, records, tangibles generated by the employee. Now, for those of us who work in offices, yes, those are things. But what about people who work out in industry? They're in construction or they're in the medical field or something like that? Well, one of the things that supervisors frequently do is look at the things that they have generated. So if you tell somebody to fix a part on a car, then you look at that part on the car to see if it was actually fixed. So these are things that any supervisor can look at after the employee has worked on it to determine whether the employee has done a good job or not. Technology is becoming increasingly the way that employers are observing employees' performance. And there's all sorts of ways GPS is one. So if you tell employees to drive the speed limit when they're out and about and you have GPS on there, you can tell whether they're driving the speed limit or not. You can usually tell who has GPS on their vehicle as you're driving along because they are driving the speed limit. Lots of ways to monitor what employees are doing on computers, including the websites that they are visiting and how long they are on those websites. Cameras. Employers are allowed to have cameras around the worksite, as long as it's not in restrooms, to monitor what people are doing. So lots of ways technology helps us to monitor. Also communication from the employee. Sometimes employees let us know they don't know what they're doing on purpose or sometimes just through their communication and what they're saying, we know that they don't know what they're doing and they're not meeting our expectations. And sometimes our coworkers tell us and sometimes customers tell us, and you need to be careful about just believing what coworkers and customers tell you about things. So always you want to when you hear something that you don't particularly care for about what an employee has done, be sure to run it by the employee and get their side of the story because there always is their side of the story. And then you take action once you've gathered all the facts. Now, there are lots of barriers to objective observation, and that's what we want our observation to be as objective as possible. So objective observation is what anyone could see, smell, taste, touch, hear. And they would agree that they all saw the same thing or heard the same thing, what have you. And so that's a subjective observation when we look at something and anyone else would see it the same way. But frequently we have biases that cloud our observation and make it subjective instead of objective. And there are lots of biases. I Googled biases yesterday and Wikipedia said there is something like one hundred and eighty-five different biases, but I'll just give you a few. Primacy bias-- focusing on information learned early on in the relationship. And this is why first impressions are so important, is that somebody makes an impression on you and it sticks in your brain and then you see that person through that first impression, whether good or bad. And so that's not really fair for people if they make a mistake. And then that's all you remember about their performance, is that mistake then there's similar to me bias. We view people like us favorably. And so if somebody does it the way that I like it done, then that's good. But if they do it differently, that's bad. There's the halo/horn effect, letting one good or bad trait overshadow others. There's the bandwagon effect-- going along with what everyone else thinks. There's confirmation bias-- searching for or interpreting new information in a way that confirms a person's preexisting beliefs. So one of the things about our brain is once it makes a decision, it doesn't like to change it. That's a lot of work and it's a lot of work to keep it open. But one of the things that is really important when you are evaluating performance is to objectively observe and not let these biases get in your way. Now, I want to tell you an example of how biases skew our perception of what we experience. After last week's webinar, I received the evaluations and I received these comments: great job. Robin is great. Very well presented. Once again, great session with excellent examples of situations and how to move forward. This is the best kind of webinar. Good info that doesn't take up a lot of time. Thank you. Thank you, Robin, I love listening to you. Today's webinar was a great learning tool for me to use, and we love how articulate and direct

you are about presenting this information, and thank you for it. The use of examples just seals the deal in your delivery regarding each topic. We definitely enjoy these webinars. Well, that's fabulous. Obviously, I love getting feedback like that, but I also received these comments: really thought the webinar was in poor taste. The presenter clearly has knowledge, but she is clearly not good at presenting it or making it meaningful. All four of these communication sessions were a big disappointment. Now, how can you have people experiencing the same thing and have such different perceptions of the situation? Because people are different. And one of the things when you are evaluating me, it's based upon whether you liked what you saw or whether you didn't like what you saw. That's why objective criteria is so important-- things like SMART Goals-- is that people either meet the criteria or they don't. For example, earlier in my career, I used to be a speech teacher. At college level. I taught communication classes and how to give effective presentations. And when I graded my students, it was on things like were they able to give their presentation in the time allotted-- five to seven minutes? Did they cite four different sources? Did they have a clear introduction, body, conclusion? Did they have clear transitions? Those types of things. So I laid out a number of things where when I'm looking or listening to the speech, they either did it or they didn't do it. And it had nothing to do with how I felt about them or their topic. That's why you need effective criteria. If you are evaluating people's performance based upon your perception of their performance, then you might give them a worse evaluation than they deserve or a better evaluation than they deserve. So let's move on and let's talk about, oh, before we do, if you're an employee and you think that you do not have effective criteria to evaluate your performance or you don't know what it is, it's really important that you ask so that you can find out what you're being evaluated on specifically. OK, now let's move forward.

The goal of providing feedback and managing performance is to inspire employees to perform. If employees are meeting your expectations, you want to tell them, so they'll continue. And if they're not meeting your expectations, you want to tell them. So they'll start. So let's go to the next slide and let's look at some ineffective feedback.

Ineffective feedback is feedback that does not inspire people to perform. So remember, that's our feedback goal, is that when we are giving feedback, we want to inspire good performance. So ineffective feedback makes people unhappy, makes them sometimes quit, makes them file lawsuits, all sorts of things. And basically, as a manager, it does not get you the results you want. So ineffective feedback is insensitive, little concern for the feelings of the other person. You just say it and it just comes out ever which way it comes out. Indirect feedback is so vague issues are hinted at rather than addressed directly. Judgmental feedback is evaluative judging personality rather than behavior. One of the things I encourage managers to do when you are giving feedback to somebody about behavior that you do not like, you want to really focus on the behavior. Sometimes managers will say things like, you have a bad attitude and I discourage you from using the word attitude. One thing is attitude is how people feel and we really don't know how people feel. So you want to state the behaviors that make you think someone has a bad attitude, such as they roll their eyes or they interrupt or they leave the room before you finish talking or just a variety of things. And so one of the reasons that telling somebody you have a bad attitude and you need to fix it is problematic also, is because a lot of times people don't know what they're supposed to fix. And so that's why talking about behaviors and it takes the personalness out of it as well. When you're telling somebody that they have a bad attitude or you're just not a morning person, are you-- or whatever-- it sounds like a personal attack. When you're focusing on behavior, it makes it less personal and more fixable. General aimed at broad issues which cannot be easily defined. So someone saying your webinar is in poor taste. That's too general. I don't know what that means. Poor timing, given long after the prompting event or at the worst possible time. Now, I committed this one time. I had an employee working for me and after his first workshop, he received some bad evaluations from the participants. And unfortunately, we were an hour out of town giving that workshop. And so we had an hour to drive back afterwards. And he saw the poor evaluations. And I should have talked about anything besides the poor evaluations on the

drive home. Unfortunately, I didn't. I wanted to talk to him about those evaluations to see what he thought, what he could do differently, that kind of stuff because that's how I do it. When something happens, I want to talk about it immediately. But he did not want to. And he told me later that he went home and he called his dad and talked about that he thought he should quit. Well, that was not my intent. I did not want him to quit. And so I should have waited until the next day or the day after that. He didn't quit. And he went on to be very successful. And then impulsive and just given thoughtlessly, just putting it out there without thinking about it. So if you give feedback that way, chances are it's not going to inspire people to meet your expectations. Instead, effective feedback is considerate. It's intended to not insult or demean, so it's considering the other person's feelings when you are telling them what you want to improve. It's direct, so the focus of the feedback is clearly stated, but not so direct that it's hurtful. It's supportive, it's delivered in a non-threatening and encouraging manner. And really, the reason you're giving feedback is because you want people to succeed. And so delivering in that way can help them receive the feedback. It's specific, focused on specific behaviors or events so that people know exactly what the issue is and what they can do to fix it. It's timed right, given as close to the prompting event as possible. But if you need to wait a little bit so that it's received better, then that's what you should do and it's planned. You think about what you're going to say, where you're going to say it, when you say it, how you say it, all of those types of things in order to get the response that you want. Now, next week's webinar is on having difficult conversations, and I'll talk much more in-depth on how to give people feedback that they don't want to hear and still get the response that you want from them. But until then, I do want to mention generational needs. There are primarily for different generations in the workplace right now, and I have touched on this a little bit in the past. So just want to remind you that those generations are Baby Boomers, Gen X, Millennials, and Gen Z. And these are the folks that were born around 1996 and after the oldest ones are 24, 25 years old. And those are the folks that are coming into the workforce right now. Now when employees are new and especially when they're young, they need guidance to ensure they are on the right path and feedback provides them with that guidance. I want to tell you about a Gallup poll. Employees who said they received weekly feedback were five times more likely to strongly agree that they received meaningful feedback. They were three times more likely to strongly agree that they were motivated to do outstanding work and they were two times more likely to be engaged in their work. This is weekly feedback. In addition, the Center for Generational Kinetics says that 60% of Gen Z employees said they want feedback from their managers at least every few weeks, if not more. And if you are an older manager, you're probably sighing right now because that's a lot of work. Well, you don't need to give this amount of feedback to all of your employees. In fact, doing so might have an adverse effect. For example, a millennial supervisor told me once that she like to meet with her employees individually once a week to give them feedback about their performance because when she was an employee, that's what she liked. And so she figured if she liked meeting weekly with her supervisor, then her staff would like meeting weekly with her. And she was puzzled one time when older, one of her older employees said to her at one of the weekly meetings, "Honey, no news is good news." And the millennial supervisor telling me the story didn't know what that meant. "What is she saying?" I explained that older employees were often used to a management style in which managers generally only talk to employees when they've done something wrong. So if my supervisor is not talking to me, that's good news. Additionally, the employee, the older employee might have felt degraded by her younger supervisor constantly talking to her about her performance. On the other hand, one baby boomer supervisor told me she was fed up with a young employee, always asking whether he had done a good job on the task she assigned him. And despite the employee performing his job well, the supervisor told me she refused to tell him so because he was so darn needy. I explained the younger generations are generally used to getting more feedback and praise from their parents and teachers and that if he was doing a good job, she should tell him. And she finally did. And he told, as she told me, that he stopped bugging her after that. So taking a minute or two to tell employees, especially when they ask, whether they met or exceeded your expectations, inspires them to meet or exceed your expectations in the future. And that's why you want to

do it. But when you are telling them they met your expectations, you want to be specific so they know exactly what they did to meet them. So giving older employees less feedback and younger employees more feedback, why can't you just give the amount of feedback you want to, and tough luck if employees don't like it? Because of a basic life principle that I say frequently, if you give people what they need, chances are they'll give you what you need. Now then if you're an employee, ask for feedback or more specifics if you're not getting it. And for example, I emailed the gentleman who commented that I clearly don't know how to present information or make it meaningful. And I ask for more specific feedback from him. And he said that he thought presentations should have facts and statistics and he wanted much more facts and statistics for me instead of personal stories. So you might have noticed that I provided more statistics in this section. And even if he's not listening today, I thought it was good advice because other people might want more statistics, too. And by the way, when you're evaluating today, let me know if you appreciated the statistics or not. So here's something that I've learned over the years. Try to improve with the feedback you've been given, regardless of how well it was delivered. Any feedback is good feedback as long as you can take something with it and improve, because that's what it's all about. All right. Let's move on and talk to you about documenting performance.

And the reason that you want to document performance is these conversations you're having with people need to be memorialized sometimes. And we already did a webinar on defensible documentation. So I'm just going to provide a quick review here. But if you don't know this already, all the webinars we conducted since September are on the Vensure website for you to view at any time. Documentation can help prevent and defend against discrimination, wrongful termination, and other claims. And even if you're an at-will employer, you still need to be able to defend yourself sometimes. But the purpose of documenting performance problems isn't just to protect the employer, it is to help the employee. It's helpful for employers when, or for employees, when you are talking to them about incidents, you're putting them on paper so that they understand the seriousness of the conversations, but also so they know exactly what you're saying. See, sometimes when we're having these feedback discussions, people are in the fight or flight syndrome and they don't hear what we're saying. And so sometimes putting things in writing helps to clarify what we said after the fact. So you want to document good performance as well as bad performance. So I don't mean to imply that documenting performance is only when people have done something wrong. It's important to note when employees have exceeded your expectations. It motivates employees when it's documented and they know what's going in their performance or their personnel file. And it also helps supervisors appear fair. So, for example, if you have an employee that has worked for your organization for, say a decade, and you end up terminating that employee and they end up suing you and you hand over their personnel file and all that's in there are poor performance evaluations and disciplinary actions, the judge or jury might think, well, why did you keep this employee around for ten years if they were such a bad employee? And you don't look fair as a result of that. So that's one of the reasons and the important elements. I mean, one of the reasons that people don't like to document is because they think it's onerous, it's a lot of work and it's really not. The most important things are that you have dates-- dates are really important-- facts and details about what happened, trying to be as objective as possible. And one of the things that's important to note is the effect on work or people involved. And the reason for that is that sometimes employees don't understand the big picture. And so you have to explain it to them. What is a big deal, me being late a couple of minutes here or there why is that a big deal? Well, you show them what the big deal is because of the effect that it has on coworkers and on the organization as a whole. And then you're probably familiar with verbal and written warnings. One of the things, I read something that I liked, so I want to tell you. A verbal warning is to inform employees of their performance issues so they have an opportunity to correct them. A written warning is to inform employees of the consequences of not improving their performance. And so looking at it with that intent might help you

craft it. One of the things that's very important is that a verbal warning is documented and you're letting employees know that it is a form of disciplinary action. If you don't do that, sometimes employees think that you're just having a chat with them and they have a different perception of what's actually happening. And then finally, the performance improvement plan-- PIP. I like these as they're like last chance agreements. And when people are sent to me for coaching, I like their employer or manager to send this along to tell me exactly what the employee needs to do in order to improve, in order to stay employed. And that's what they import a performance improvement plan is about, is spelling out exactly this is what you're not doing, this is what you need to do, this is how much time you've got to do it. So all of this documentation then leads to the performance evaluation, which we'll talk about next. However, if you're an employee, one of the things I strongly encourage you to do is keep your own documentation of your performance. And so certainly you're going to keep copies of any documentation like verbal warnings and written warnings and those types of things yourself. But the other thing is emails that you've gotten from customers or from your supervisor or anybody who's complimenting your performance, you want to keep track of those things, too. And one of the reasons for that is, well, I'll tell you. Let's go on to the next slide.

The reason for that is that I really like employee self-evaluations. So when you keep track of your accomplishments, you can put it all on the employee self-evaluation. Now, when rating performance, the employee self-evaluation should look exactly like the evaluation that the manager is going to evaluate the employee on. And I like them because for one thing, employees sometimes remind us of things that they have accomplished that maybe we forgot about. And so when it's there on their evaluation and we look at it before we give them our evaluation of them, then we can put those on our evaluation as well. So they remind us of things that happened that maybe we lost track of, didn't document ourselves. And then the other thing is that the employee self-evaluation helps you get an idea of what the employee thinks of their performance before you tell them what you think of their performance. And it helps prepare you for that conversation. So if an employee rates themselves really highly and you did not rate them that highly, then that's going to be a more difficult conversation. And one of the things, too, is that it reflects sometimes how much feedback you've given them. If they've evaluated themselves really highly and you're thinking, no, you are not performing that well, then that's a disconnect that you need to fix. Perhaps you did not have enough difficult conversations throughout the year to let them know. Now, one of the things about performance evaluations, a lot of people don't like them and. A survey that I read said that if somebody could say how they feel about performance evaluations, they said they're time-consuming, frustrating. They're a burden, they're a headache, they're a pain. They see no value in them. And as a matter of fact, in HR, there's kind of a push a couple of years ago to get rid of the performance evaluation, and lots and lots of articles that I read that just talked about how outdated they are and that kind of thing. And then again, you read things like surveys where people are saying the performance evaluation was not useful. It didn't tell me anything else or it tells me the same thing over and over. And so let's just get rid of them. I don't think performance evaluations are the problem. I think the problem is how they are approached. And the problem is that people only have discussions with employees once a year. And obviously you've got to do it much more than that. Now, one of the things before the whole performance appraisal process, it's important to make sure that rating methods are consistent among supervisors. And what I mean by that is that you want to meet with your supervisors or anybody who's evaluating anybody else and remind them of your system. What if it's a numerical system, what a one means, what a five means, and you always have those supervisors who have five is the highest thing that you can give someone. They're not going to do it because they always think that there is room for improvement. And you've got those supervisors who always give a three because that's all the work they want to do on it. And that's no good whatsoever. That's one of the reasons people think performance evaluations are no good anymore is because of how they're used and how they're approached. One of the things we know is that some people evaluate people more harshly

than other people do. And that's one of the reasons that you want to make sure everyone is on the same page when they're evaluating performance. If you give an employee a four anyone else in your position should also give that employee a four and evaluation shouldn't vary according to who the evaluator is. So that's one of the reasons that performance criteria is so important also is that everyone should be able to rate the employee the same because they either met the criteria or they did not meet the criteria. One of the things that's very important to have no surprises on the evaluation. And that's something that happens on occasion, is that people don't talk to employees and then they just put everything on the performance evaluation. And then the employee is shocked by things that are on there. They thought they were doing a good job and all of a sudden they're finding out they're not doing a good job. That makes for a very unhappy employee. And that's not what you want. That doesn't mean that you give the employee a higher rating than they deserve so that they'll be happy. That's one of the things when I was a manager of an organization that would happen on occasion is that the supervisors gave higher evaluations that the employee deserved because they didn't want any tears or any unhappy feelings or things like that. That's no good either. It's just that you need to have those discussions throughout the year so that when you actually look at the evaluation with the employee, they know everything that's on there because you've had the discussions about that all year long. It's just simply a summary of what you've discussed throughout the entire year. Give it the time and attention it deserves. And so I had an organization once that I was working with and their performance evaluations, the employees could either be given an unsatisfactory, a satisfactory, or an above satisfactory. Now, if the supervisor gave somebody an unsatisfactory, then they had to note why. If they gave somebody an above satisfactory, then they had to write a comment about why. And so all too often people just give it everybody satisfactory, took them all of five minutes. And that's one of the reasons that people think that performance evaluations are not a good use of time. No, it is a good use of time if you give it the time and attention it deserves. And the thing is, is that people should be completing the performance evaluation throughout the entire year. Don't sit down one time a year and you've got 50 employees to evaluate and you've got to get it all done now. No wonder people don't like doing it. And so if you keep track and complete the evaluation throughout the year when you've had those conversations, then it's not so time-intensive before the evaluation itself. Now, the delivery is as important as the document. And I know this from personal experience. Once upon a time at a job far, far away. I had an evaluation and when I came into my boss's office for my evaluation, she was on the phone and she was on a personal call, I could tell, but she handed me my evaluation and she continued with her personal phone call while I read it. One of the things that was on the evaluation, she said that I hadn't met one of my performance goals when I actually had and provided her with documentation that demonstrated that I had. And then there were a couple of nice comments from coworkers on commendations that they had given me for my performance. So on paper, it looked pretty good once we fixed the error of I didn't meet one of my performance goals. So when she got off the phone, I told her I did meet that goal and she said, oh, OK. And so then she changed it. And then she said, "You know, the CEO wanted to downsize our department and wanted me to let you go this year. But I fought for you. So you're still here. But one of the things you've taken too many sick hours in order to go to your doctor's appointments. And so you need to go to your doctor's appointments during your lunch hour from now on. So just please sign it and it'll go in your personnel file." And that was it. Even though I had met or exceeded all expectations, even gotten commendations, that's what the discussion was about. And so I walked into her office being her most motivated employee, and I walked out of her office understanding why everyone else was demotivated. So the delivery is as important as the document. If you demonstrate that you don't have time for this discussion or you're trying to multitask during the discussion, then that's what you're communicating to your employee, that they are not important. And finally, what you're supposed to be doing at the performance evaluation is mostly to look at the year ahead. So I heard the description of evaluations that I really like. It's like driving a car. Every once in a while. You look in the rearview mirror to see what's behind you. But for the most part, you're looking forward to see where you're going. And so that's why you plan work and set expectations for the new evaluation period. Now, one of the things that happens to me every once in a while is employers ask me if I can provide

them with a generic performance evaluation they can use to evaluate their employees. I can, but the employee's performance evaluation should reflect their job description. And so it shouldn't be generic. It should be based on their actual job. So, for example, if the job description says that essential job duties include recruiting, interviewing, and evaluating candidates, then the performance evaluation should rate people on their ability to recruit, interview, and evaluate candidates. So it should really mirror the job description. And once again, I recommend showing all new employees the performance evaluation during their onboarding process so they understand how they'll be evaluated. It helps to clarify your expectations, reduce misunderstandings and prevent unhappy surprises during the evaluation meeting. Now, if you're an employee, ask for clarification. If you need it, come up with goals you want to achieve during the next evaluation period. So everyone wants employees to be successful, regardless of whether you're a manager or an employee, I hope I've given you an idea or two on how you can make that happen. And that's the information I have for you. What are your questions for me?

Emmet Ore:

Thanks, Robin. Looks like we have one question here, should we give evaluations if we're not going to give raises?

Robin Paggi:

Yes, and that's one of the things that I noted that some employers were doing, and that was their excuse, "We're not doing performance evaluations because we cannot give raises. And so why go through the process?" And certainly, evaluations can help determine whether you're going to give raises or not. But that's not the end all be all reason of evaluations. So I encourage employers to continue to give annual evaluations regardless if they're going to give raises or not for a couple of reasons. One, if you do not continually assess people's performance, you might go years without that evaluation. And then if you fire somebody for poor performance and you don't have documentation except for an evaluation that they got five years ago when they were a good employee, then that might be a problem for you. So you want your documentation to be up to date, always. The other thing is that I discourage people giving the evaluation and then immediately telling people that they're getting a raise. And one of the reasons for that, and I know this as an employee from a previous job in a land far, far away, is that when you're going through the performance evaluation and you're reading it with your supervisor, all you really want to do is get to the back page where it says what the raise is that you got. And while your employer is talking to you about your performance, all you're thinking is hurry up so we can talk about the raise I'm getting. And so for that purpose, I suggest that if people are getting raises or bonuses, that be a separate conversation so that when you're talking to people about their performance, that's really all it is. So certainly you will tie raises to performance. And hopefully, you're giving people raises when they deserve them, and you're not just giving everybody raises because that's very demotivating for your high performers. But you do use evaluations to determine raises. I just discourage having the conversation about the raise during the performance evaluation.

Emmet Ore:

Awesome. What is the percentage of time a manager would be expected to spend on the employees? It seems we have other duties in managing employees as well.

Yeah, and so that's one of the things you need to schedule in, especially if you have a lot of employees you need to schedule in time. I was just having a discussion with someone I was coaching about this. One of the things that happened during the performance evaluation with one of his employees is that the employee began to tell the supervisor what he thought of his performance and the supervisor came back with, "This is not my performance evaluation, this is yours."

And the employee came back with, “But this is the only time that I get to talk to you about these types of things. And so, therefore, I need to talk to you about it now.” And so that was just a train wreck. So that’s one of the reasons that you want to make sure you’re talking to employees along the way. Now, this particular supervisor that I had this conversation with supervises 20 people. And so when I told him you need to have more frequent conversations, that was his question. How do I have conversations with people all the time? Well, you don’t need to, but at least if you schedule 15 minutes a week with at least one employee to sit down and discuss how are things going with you? Is there anything I can do for you? Is there anything that’s not working for you that I can help with, then I think that’s not too burdensome to do. And one of the things people say, as the supervisor told me, well, we have an open-door policy, people can come talk to us about problems any time they want to. But they frequently don’t, like the employee in this instance. Yes, they have an open-door policy, but it takes a lot of guts to go talk to your supervisor about things you’re unhappy with for some people. And so that’s why the supervisor needs to ask very direct questions. Is there anything happening that I can help you with? Is there anything you need from me? Is there anything that’s happening that you do not like that I need to be concerned about? If you don’t ask those specific questions, a lot of times people will not tell you anything and you’ll find out about it after they quit and have filed some kind of complaint. So at least 15 minutes a week with at least one employee, and that should at least get it started.

Got it. OK, here’s a question I’m interpreting as how do you get good feedback to your employees and from your employees if there’s a little bit of a language barrier?

Robin Paggi:

Well, one of the things I mean, interpreters are always good if that’s a problem. But one of the things that you want to be able to use very common words as much as possible that people will understand. And that’s one of the things that every once in a while we might use some words that are perfectly understandable to us but are not understandable to others. And so just making sure that language is very basic, using interpreters if necessary. And again, the performance criteria and telling people you are meeting this criteria and that’s good. Those types of things should help you.

Emmet Ore:

Excellent here. It looks like we got another one. As you just shared, there seems to be a trend in corporations to keep performance evals separate from raises or bonuses. What if the raise is deserved at that time? Should you schedule a separate meeting?

Robin Paggi:

I would yeah. I mean, if it’s not too much of a burden, I would simply because, again, if people know that this is what’s going to be talked about, when we finally get through talking about my performance, then that’s all they’re there waiting for and they’re not hearing anything else. Now, if this is an exception and for some reason, you need to be able to tell a person this information in this instance, then I say go for it. I wouldn’t do it on a regular basis because once again, it just makes people think about the money and nothing else.

Emmet Ore:

Got it. Looks like we have time for one more here. What should I do if my supervisor doesn’t give me any feedback?

Robin Paggi:

Well, then ask for it. And that's one of the things that a lot of times people don't give feedback or if they do, it is the things that I talked about is too broad, is too general, and you don't know what people want. And so one of the things that I did, as I mentioned, is that people who gave me comments that I didn't particularly care for, but I didn't really understand what the problem was, I followed up with them and I said, can you be more specific? So I know exactly what the issue is. And they took the time to be more specific and I took the time to appreciate them for that. And so that's what you need to do if you are not getting what you need, ask for it. And I know sometimes that that's difficult to do. But if you're not comfortable doing it face to face, then sending an email or something is just clarity is so important for success. And if we're not receiving clarity, then we need to take the initiative to ask for it.

Emmet Ore:

Awesome. Well, I think that'll do it for today. Thanks, Robin, and thank you all for joining us. We'll see you next week for part two, which is best practices for difficult conversations. Thanks so much.