Setting goals and reviewing results

presented by

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Agenda

+ Performance cycle
+ Smart performance goals
+ Liability management
+ The interaction essentials™ and performance discussions
+ Resources for managing performance
Performance cycle

START of Cycle
Set Goals

MID-Cycle
Review Results to Date

END of Cycle
Review Results

LEADER
DIRECT REPORT

PERFORMING

COACHING

Feedback
Tracking
Feedback
Tracking
Feedback
Tracking
Managing performance

- Both share responsibility for performance
- Leader coaches; direct report performs
- Three formal discussions
- Both track performance and share feedback
SMART goals

Specific
Measurable
Attainable
Relevant
Time bound
Pitfalls

+ Using vague language, such as “promptly” or “as soon as possible”
+ Writing “all or nothing” goals
+ Agreeing to tasks or activities, not actual goals
Components of a SMART goal

Specific
Decrease shipping errors by 3–5 percent by the end of the third quarter.

Measurable

Time bound
Writing goals

+ Start with the organization’s goals, objectives, or strategies
+ Ask how direct reports can support the goals
  - Contribute to organization’s success
  - Build buy-in and commitment
+ Write and agree on SMART goals together
What are your corporate goals?
How can you and your direct reports support those goals?
Formula for writing goals

Action verb + Key results + Measure + Deadline date = Well-written performance goal
Liability management

+ Federal laws prohibiting discrimination
+ Americans with Disabilities Act and Amendments Act
Liability management example

Wylie is a great employee; **young and energetic**. His **constant energy level** made it easy for him to quickly implement the new mail routing improvements.
Liability management example

Karen was not able to complete the goal we set because she missed too many days of work after she injured her back.
Common rating errors

<table>
<thead>
<tr>
<th>Error</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First impression bias</td>
<td>Based on initial favorable or unfavorable judgment about an employee</td>
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<tr>
<td></td>
<td>who ignores or distorts the employee’s performance</td>
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<tr>
<td>Halo/horn effect</td>
<td>Basing overall evaluation on one positive or negative aspect of performance</td>
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<tr>
<td>Central tendency errors</td>
<td>All employees are graded close to the middle of the rating scale</td>
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<tr>
<td>Similar-to-me bias</td>
<td>Judging an employee the supervisor perceives as similar to themselves</td>
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<tr>
<td></td>
<td>more favorably than those who differ in terms of background or interests</td>
</tr>
<tr>
<td>Recency errors</td>
<td>Evaluations are based on one particularly good or bad event that</td>
</tr>
<tr>
<td></td>
<td>occurs close to the appraisal time</td>
</tr>
<tr>
<td>Leniency/strictness errors</td>
<td>Supervisors rate employees too easily or harshly</td>
</tr>
</tbody>
</table>
Personal and practical needs

**Personal needs**

to feel valued, involved, and supported

**Practical needs**

to identify ways to track progress and agree on level of performance
Interaction process

ESTEEM
EMPATHY
INVOLVEMENT
SHARE
SUPPORT

Check for understanding
Make procedural suggestions

OPEN
CLARIFY
DEVELOP
AGREE
CLOSE
Interaction essentials
(to meet personal and practical needs)
Two types of data

Operational data
What people are expected to achieve

Behavioral data
How people are accomplishing their goals
Effective feedback

- Situation
- Task
- Action
- Result

- Situation
- Task
- Action
- Result
- Alternative Result
STAR example

**S**tory: We had to quickly implement a new tracking system at a busy time. **A**ction: You learned the system first, and then held a short but thorough training session today for the team. **R**esult: Everyone has a much better understanding now of what to do, and you saved us time!
STAR/AR example

In your desire to meet the client’s request, you didn’t notify Jordan first. When he said he couldn’t meet the deadline, you wrongly accused him of costing you the sale, which led to an argument and no resolution. If you had addressed his concerns instead, you might have prevented the conflict and devised a way to meet the client’s needs.
Sources of operational data

- Calendars
- Project timelines/milestones
- Reports
- Charts
- Feedback surveys
- Assessments
STAR can be used to...

1. Provide immediate and ongoing coaching and feedback
2. Gather behavioral data for mid-cycle and end-of-cycle
   + Builds confidence, knowing you have solid data or need more
Challenges in the review conference

- Emotion
- Non-participation
- Defensiveness
- Comparing
- Anger
- Personal challenges
Review

- Preparation
- Inclusion
- Personal needs
- Liability management
- SMART
- STAR / STAR/AR
- Review conference
Thank you

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&

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Thank you for joining us

For more information, or to speak with an Insperity® business performance advisor, visit insperity.com/nsca or call us at 855-677-0402.