Setting goals and reviewing results

presented by

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Performance Specialist
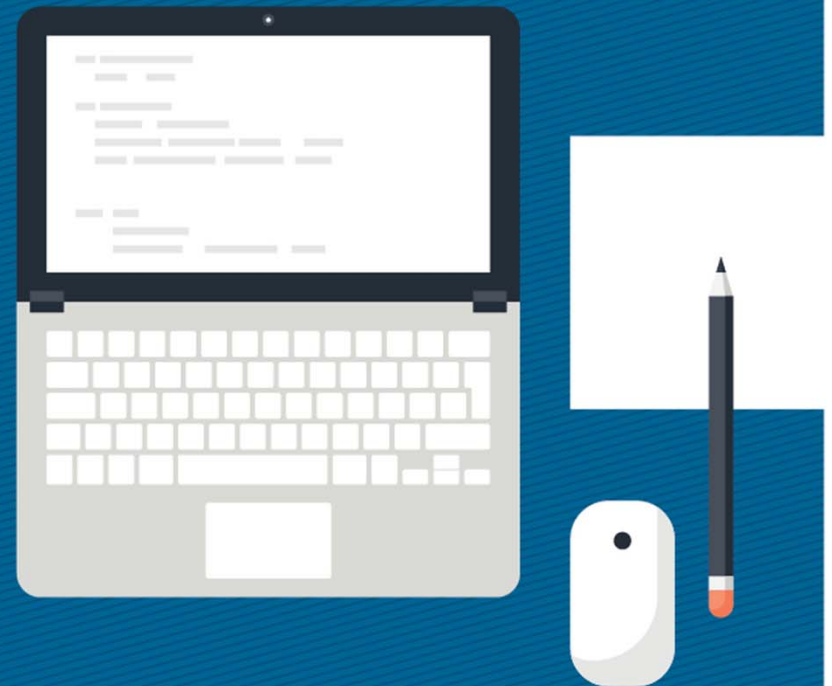
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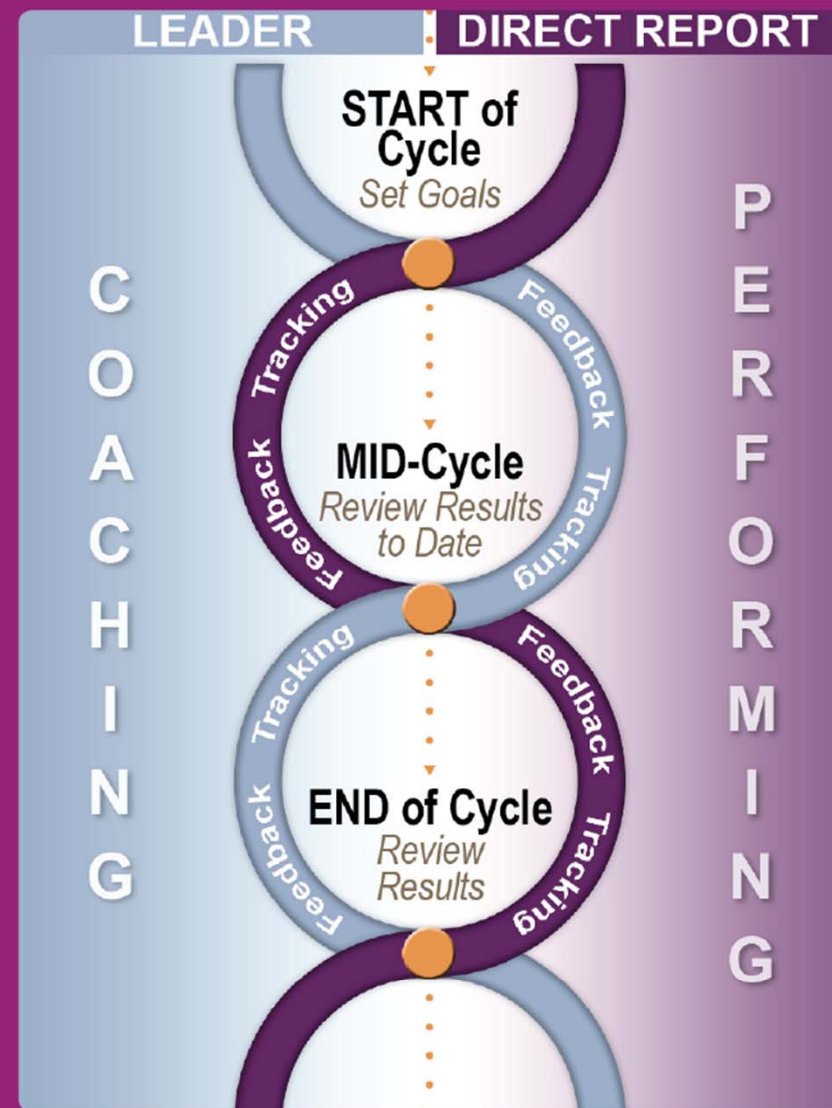Cassie Richardson,
SPHR, SHRM-SCP
Senior Human Resource Specialist

Agenda

- Performance cycle
- Smart performance goals
- Liability management
- The interaction essentials[SM] and performance discussions
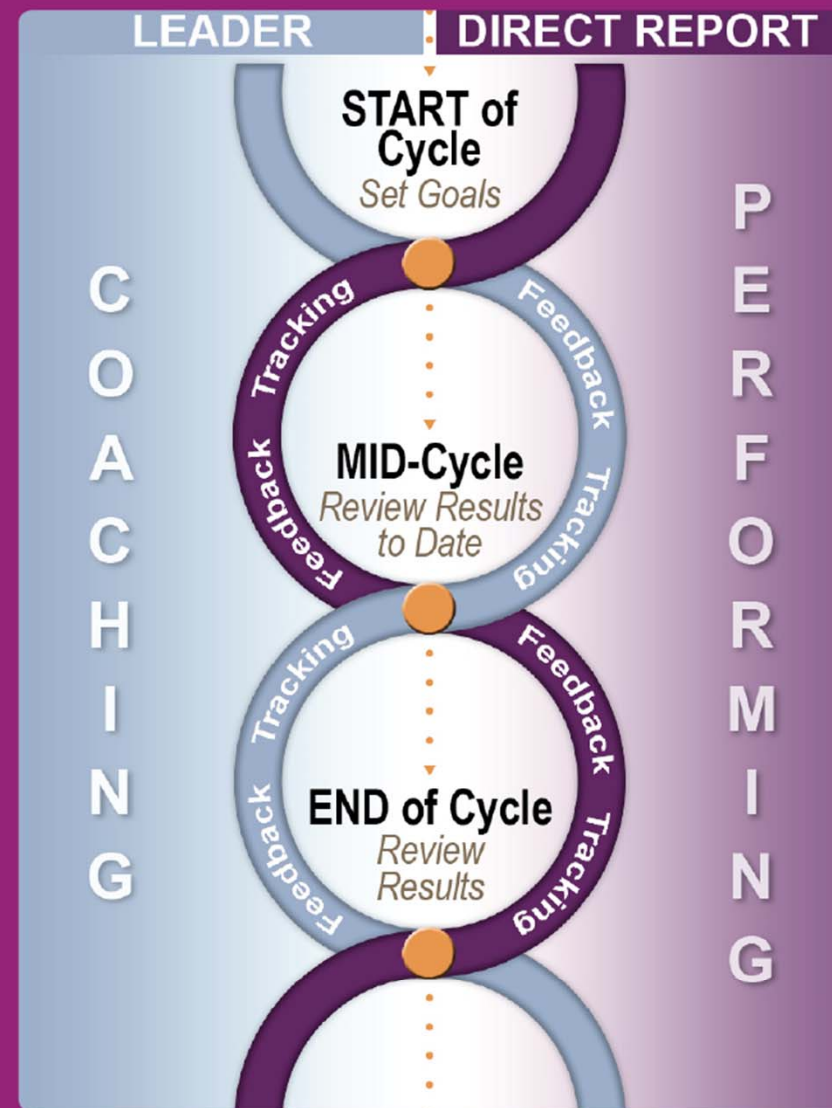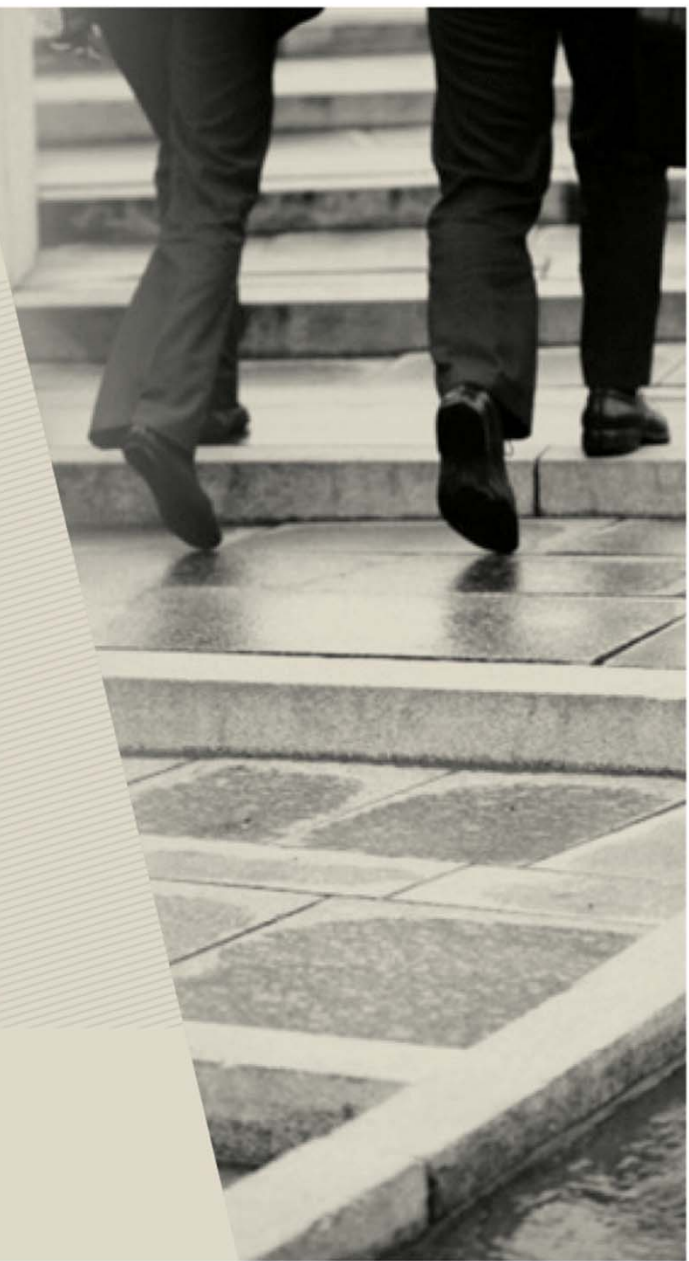- Resources for managing performance

Performance cycle

Managing performance

- Both share responsibility for performance

- Leader coaches; direct report performs

- Three formal discussions

- Both track performance and share feedback

LEADER | **DIRECT REPORT**

COACHING

PERFORMING

START of Cycle
Set Goals

Tracking
Feedback
Feedback
Tracking

MID-Cycle
Review Results to Date

Tracking
Feedback
Feedback
Tracking

END of Cycle
Review Results

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SMART goals

Specific
Measurable
Attainable
Relevant
Time bound

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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

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Components of a SMART goal

Specific **Measurable**

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

Time bound

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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

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What are your corporate goals?

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How can you and your direct reports support those goals?

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Formula for writing goals

Action verb **+** Key results **+** Measure **+** Deadline date

= **Well-written performance goal**

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Liability management

- ➕ Federal laws prohibiting discrimination
- ➕ Americans with Disabilities Act and Amendments Act

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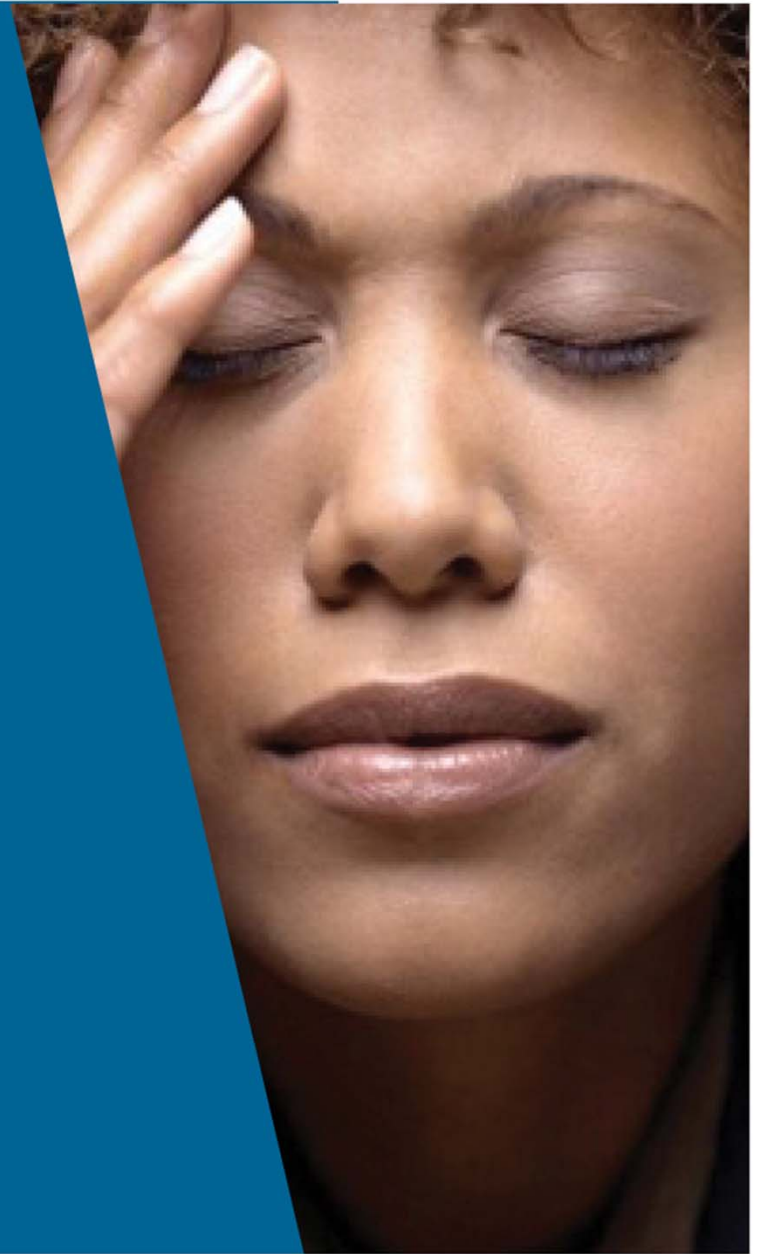YOUR VOICE · RESOURCE · ADVISOR

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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.

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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.

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Common rating errors

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

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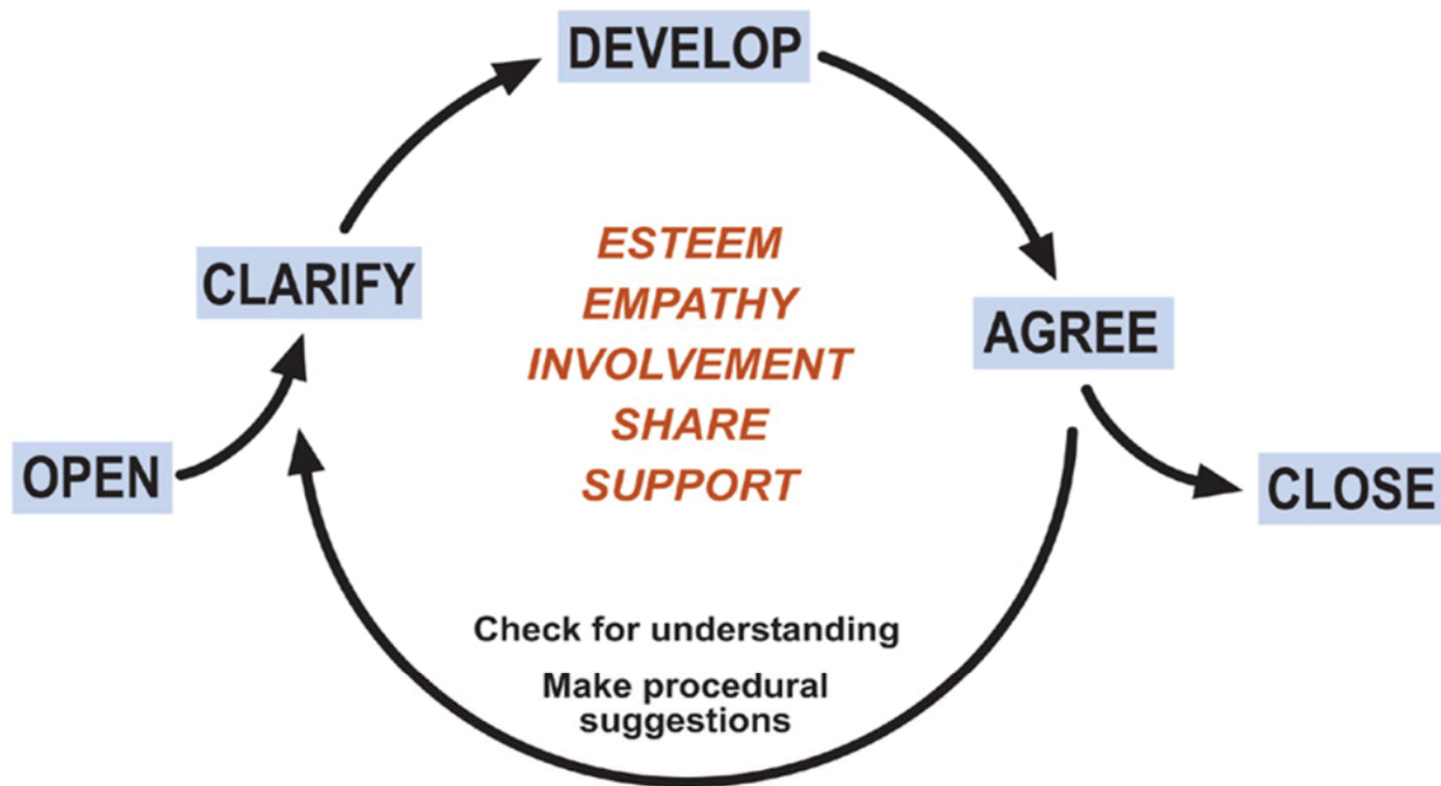**Insperity®**

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

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Interaction process

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

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Effective feedback

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STAR example

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

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STAR/AR example

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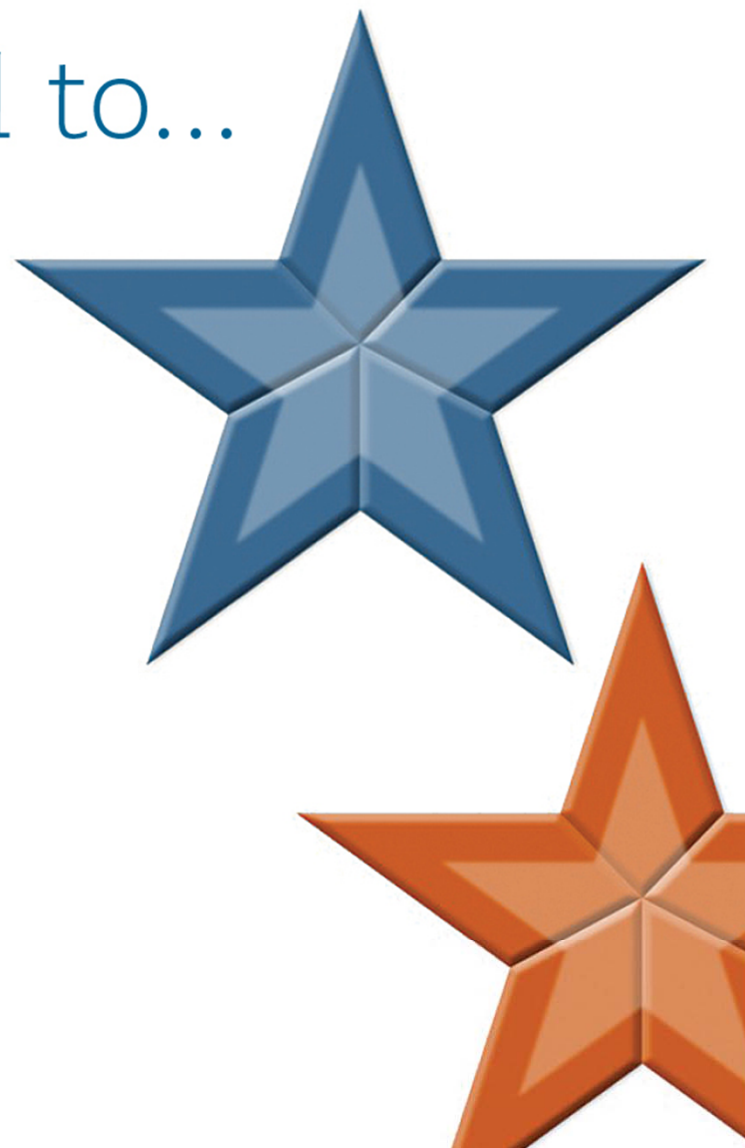
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Sources of operational data

- ➕ 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

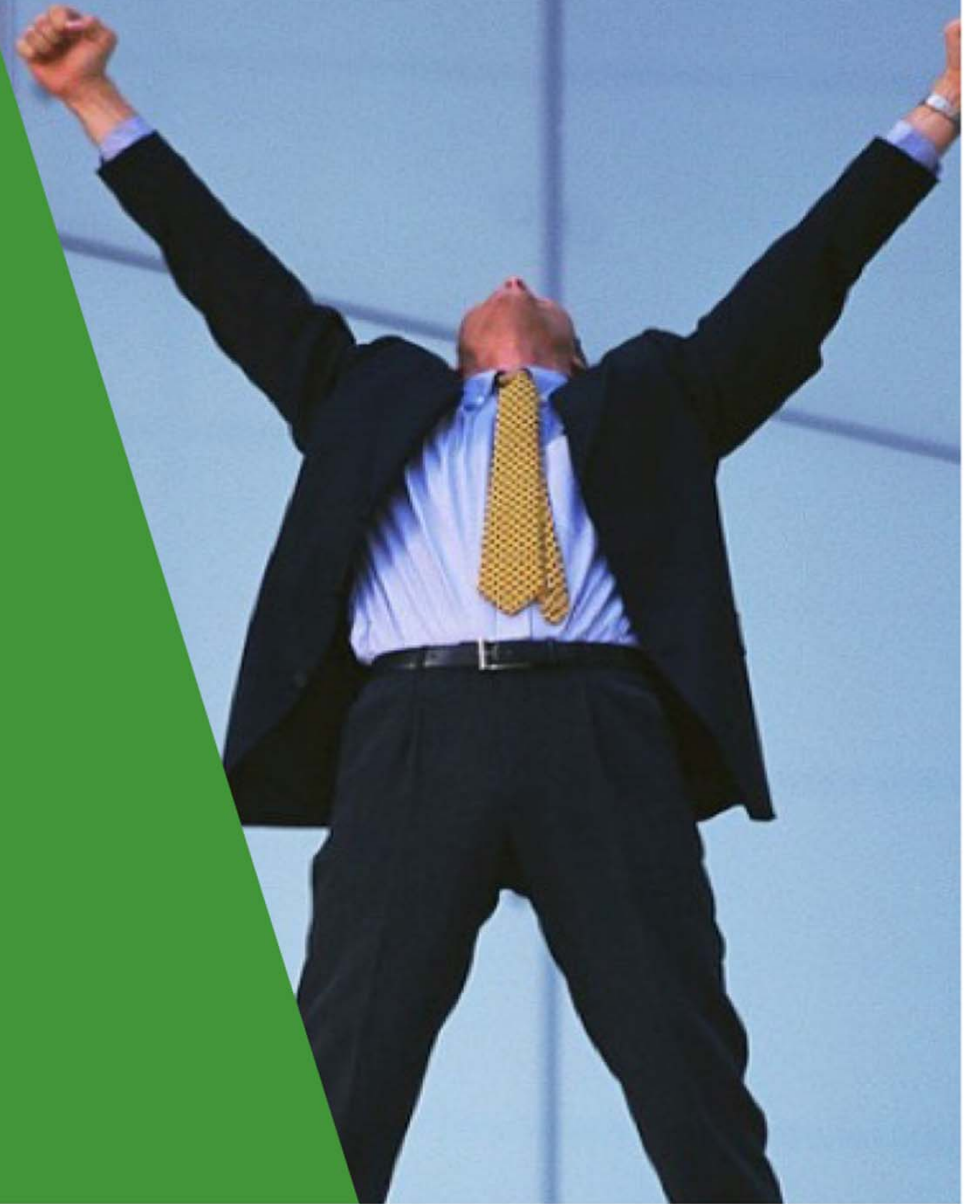**+** Builds confidence, knowing you have solid data or need more

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Challenges in the review conference

+ Emotion

+ Non-participation

+ Defensiveness

+ Comparing

+ Anger

+ Personal challenges

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Review

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

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Thank you

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&
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