

Improve Morale & Achieve Goals with a Proven Performance Management Process

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SETTING GOALS

Setting Goals

- Establishing goals, or objectives, helps motivate workers
- Goals should challenge employees while still being attainable
- Managers should use goals to evaluate performance on a regular basis
- Job descriptions can be used as a guide
- Objectives should be specific and measurable
- Developmental goals can help workers grow

SMART Goals

- **S**pecific: Be precise about what should be accomplished
- **M**easurable: Determine the metrics that will be used
- **A**chievable: Employees should be able to realistically meet the goal
- **R**elevant: The goal should align with the broader business goals
- **T**imely: A goal should be grounded with a timeframe



SMART Goal Examples

- *“Sell \$12,000 worth of product each month.”*
- *“Increase weekly Twitter shares by 20% each month by adding a graphic to each social media post.”*
- *“Create a landing page promoting our new service and have it go live by the end of third quarter.”*
- *“Increase demo requests by 15% by year’s end by creating a new product video and case study.”*
- *“Boost our average open rate for our email marketing campaigns 10 percent by split-testing subject lines.”*

Goals for Remote Workers

- It can be particularly difficult for remote employees to stay motivated and productive while working from home
- Knowing they are contributing to both the team's and company's success can help teleworkers stay engaged
- Schedule time with your remote workers to discuss their personal and professional goals

Goals for Remote Workers

- While setting goals for remote workers, you need to determine the specific results that need to be achieved
- It's particularly important that remote workers' goals are Specific, Measurable, Achievable, Relevant and Timely
- Hold regular meetings when you can review each worker's progress, identify potential roadblocks and adjust goals as needed
- Identify resources to help remote employees achieve objectives

DOCUMENTING OVERALL PERFORMANCE

Documenting Performance

- Document performance as it happens
- Collecting this information will be invaluable when it's time to prepare the employee review
- With proper documentation, you have the facts to make employment decisions, like training opportunities, salary increases and promotions
- Good documentation also protects you if an employee lawsuit is brought against your business

Documenting Performance

- Be fair and treat similar employees in the same manner
- When recording situations, stick to the facts
- Record both the good and the bad so you have a complete record of your employee's performance
- Meet regularly with all your employees

DOCUMENTING DISCIPLINARY ISSUES

Disciplinary Documentation

- **Stick to the facts:** Include the date, time and location of the problem. Be as precise and thorough as possible.
- **Focus on the behavior – not the person:** Don't comment on personality traits and don't include opinions about the employee.
- **Don't exaggerate:** Be careful not to embellish the facts. Avoid using absolutes such as “always” and “never” unless you can substantiate it.

Disciplinary Documentation

- **Don't contradict previous documentation:** It's important that your messaging conforms with previous documentation.
- **Identify the specific rule or policy violated:** Include the rule or performance standard the employee violated in your written warning.
- **Indicate expectations for improvement:** Communicate what you expect the employee to do to correct the problem. Try to give specific objectives.

Disciplinary Documentation

- **Make suggestions for meeting objectives:** If applicable, communicate what resources are available to help your employee meet the goals.
- **Specify disciplinary action imposed:** List the disciplinary action you're taking as a result of the violation.
- **State consequences for failing to correct the problem:** Communicate the action you will take if the employee fails to meet the objectives.

USING PROGRESSIVE DISCIPLINE

Progressive Discipline

Progressive discipline puts employees on notice of the problem, allows them the opportunity to correct the behavior, alerts them to the consequences of not improving, and creates a record of the problem. For example, employees may be given:

- A verbal warning for the first offense
- A written warning if the problem continues
- A final written warning
- And, finally, termination

Progressive Discipline

- To work properly, managers must apply progressive discipline consistently
- Managers can't create special rules or allowances for certain people
- Doing so may be seen as discriminatory by other employees
- It can destroy morale and lead to a lawsuit

CONDUCTING REVIEWS

Performance Review Trends

- Once-a-year evaluations are decreasing
- Managers today meet with employees regularly regarding performance
- Appraisals focus more on professional development
- Employee evaluations aren't the only criteria for salary increases

Types of Evaluations

- **Competency-based review** — This ties performance to successful execution of specific, goal-aligned behaviors. It's a good approach for inexperienced managers.
- **Crowd-sourced or 360-degree review** — This uses feedback from coworkers and colleagues to evaluate performance. This can provide more well-rounded input but can also be subjective.
- **Employee self-evaluation** — This requires the employee to complete a self-assessment in advance of the performance review meeting. Works best when combined with manager assessment.

Review Practices to Avoid

- **Saving all feedback for a once-a-year review:** Meaningful performance reviews start with interacting with employees as situations occur.
- **Focusing only on recent work:** Don't fail to recognize notable employee achievements from earlier in the year.
- **Basing reviews on opinion instead of data:** Evaluate your employees based on progress toward stated goals, not subjective standards like personality.

Review Practices to Avoid

- **Lumping all employees together:** Combined team evaluations don't address individual strengths and weaknesses.
- **Competition creeping into crowdsourcing:** If 360-degree feedback turns into a way for employees to backstab others, you may need to rethink that approach.
- **Setting goals too low or high:** If you find employees are not challenged to improve, or aren't meeting expected goals, reevaluate your expectations.
- **Not applying standards fairly:** Treating employees with similar job roles differently can lead to legal trouble.

During the Review

- Start with praise for work well done
- Discuss each objective and offer ratings and support your views with examples
- Invite feedback along the way
- Point out areas the employee must improve
- Explain why good performance in certain areas is critical

SOLUTIONS TO PROTECT YOUR BUSINESS

Progressive Discipline Smart App

- Manage the entire disciplinary process
- Treat each violation accurately, promptly, consistently and fairly
- Link violations together – 3 strikes process
- Provide manager with access to manage their own employees
- Easy to learn and affordable at \$90/year regardless of employee count

Fill-and-Save™ HR Form Libraries: Performance Management

- Library includes 10 different forms (SMART goals worksheet, employee self-review, 360-degree review and more)
- Electronic forms make it easy to route, complete and save completed forms directly to your computer
- Use them to support end-to-end electronic workflows for both on-site and remote workers
- Use the forms as often as you need for a full year
- All forms are attorney-approved
- Every form comes with a tip sheet offering guidance

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Questions



Reminder: All attendees will receive a link to the presentation and slides in a follow-up email.

THANK YOU!