

MAGEE

Performance Reviews that Perform Real & Lasting ROI

Ten Considerations for Your Next Developmental Engagement

Is Your Culture at Stake?

Start with the end point in mind, “what is the purpose of this performance assessment instrument and my performance coaching review session?”

Future focused, present tense relevant, historical benchmarked – performance appraisal instruments, assessments and reviews can deliver real ROI. The complexity of a performance review document, the system utilized, and the administration of the discussion can be as unproductive and meaningless to some as it can be eye opening, revealing and productive for others – it is all your choice. The United States Department of Labor and the United States Department of Commerce estimate that just in North America alone, businesses last year alone lost more than \$400B do to ‘disengaged’ employee performance!

Along with the compliance expectations that your organization may require and the life best-practices that you have learned in the application of performance instruments and review presentations, consider these additional human capital development strategies. To elevate the engagement, developmental and accountability opportunities of a performance process, consider the accelerated effectiveness and thoroughness that could be actualized if you utilize all of the following instruments and resources in the ultimate development of the performance review.

Some considerations for your next performance review, as a true human capital development opportunity:

1. Values, Vision and Mission Statement

Calibrate your mind for an effective assessment experience by reminding yourself (and in the performance review session remind the other person) with what the core reason the organization exists and the role we each serve. The core Values of the organization should be seen in our every action, work product and behavior. It is our collective Values that shape our organizational and individual Visions and this manifests in our public statement of purpose as a Mission Statement. That Mission Statement serves as your GPS to what we should be doing, excelling at, and conversely what we should not be demonstrating or doing. All of this is recorded in part throughout the performance assessment instrument review process.

2. Job Description

As you complete the performance assessment instrument reviews/notes you really should have a copy of the most up-to-date thorough position or job description that you are about to assess an individual within. As you benchmark their performance into this document for this measurement period, you should first review in detail the job description. It is

critical for the health of the organization and the accurate measurement assessment of the individual, that a control factor be used. If an individual is doing 100 percent of that job description as hired, then that individual has earned a rating score into this performance assessment instrument of “Meets Expectations” and nothing higher or lower – providing the appropriate objective honest assessment, narratives and score is critical for the integrity of the process!

To hold you accountable for effective assessment and coaching then, in any area of that job description where a person is not performing at expectation level, then they have earned a score in that specific area of “Not Meets or Unsatisfactory” and you must score them accordingly. If someone wants to know how they can achieve a score greater than “Meets Expectations/Satisfactory” then the job description becomes your consistent reference source, do more than what is printed as that is what you were hired to perform and that is what your salary compensation package rewards you for producing each pay period.

Jeff Magee

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3. **The Player Capability Index Model**

The macro and micro reflection of the person to be assessed against the Player Capability Index is essential in recognizing their 'Aptitude' (functional knowledge, skill, ability, IQ) and their 'Attitude' (passion, work ethic, commitment, desire, engagement levels, EQ). Where an individual lands within this L-Grid model (aka Player Capability Index) in regards to any micro specific situation will dictate individual assessment scores within sections of your performance assessment instrument. Conversely, where a player lands within the L-Grid over-all during that assessment time period will serve as their macro score and so too should scores and narratives in the performance review reflect their scores. (defer to previous leadership development series article of the Player Capability Index Model or the book *The Managerial-Leadership Bible Revised Second Edition* for reminder, reinforcement or insight). As you complete the performance assessment instrument, each measurement area should be addressing how one is performing and how the organization wants one to perform in these two above area – 'Aptitude' the technician side of one's performance and the 'Attitude' the engagement professional side of one's performance. All of this then rests on the 'Application' of their 'Aptitude' and 'Attitude' that is displayed as their work product. All three of these variables are ultimately what you track in a performance assessment review.

4. **Previous Assessment**

Defer to the last three performance assessment instrument reviews/notes as a minimum if available to explore what KPIs were measured, what attributes and accomplishments were noted. Also review for behavior patterns of excellence, mediocrity and unacceptable. Review the associated Performance Development Plans (PDP) that were (or should have

been) micro developed in concert with the performance review measurements. This data will provide you with objective criteria for completing the next employee appraisal as a true human capital development tool and/or how to critically assess unacceptable or low performance and detail that in this exchange to ensure significant behavior growth by your next measurement period. Future and on-going PDPs should be benchmarked into and off of the performance review to ensure maximum Trajectory Calibration (defer to previous leadership development series article of Trajectory Code or the book, *Your Trajectory Code*, for reminder, reinforcement or insight). The assessment instruments analytics are important as an objective diagnostic, but more revealing should be the detailed narrative sections from past reviews and are critical for you to capture detailed behavior observations and action plans in future documents you administrate.

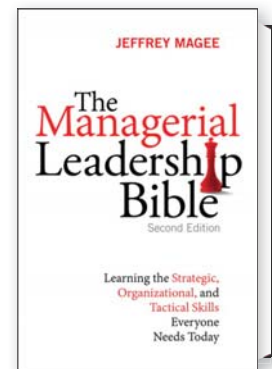
If you are assessing an individual for the first time to/within your organization, request copies of their past three performance reviews from their previous employer as a benchmark insight and developmental reference point ...

5. **Performance Improvement Plan (PIP)**

Sometimes there has been a reason in between performance review time periods or at the time of a performance review to focus additional attention and need for specific behavior performance adjustments or improvements, to warrant a PIP to be created. This document should also be referred to in completing an individual's over-all performance assessment instrument. Keeping in mind that if the PIP details five things to be done and only four are completed, then here a score of "Not Meeting Expectations" must be awarded. The purpose of PIPs and the performance assessment instrument is to detail how to maintain excellence in actions and ways to attain excellence in future actions. When someone does not meet excellence and you score them as "acceptable" "meeting" or higher you dilute the developmental process, miss lead the recipient's psychology of reality, and actually send a signal to achieving performers that they do not matter.

6. **Return to the Player Capability Index Model**

You need to benchmark all of this data through an objective and thorough diagnostic for creating the final scope



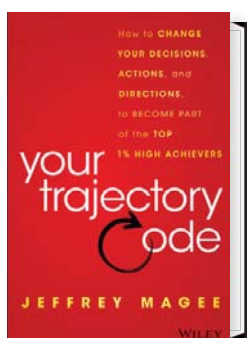
and depth of a job description, a reference template for completing and coaching and individual with a PDP or PIP, and a means to do a deep dive into the performance review to truly serve your employee/colleague/associate to attain the greatest level of efficiency, pride and enjoyment in what they do – the Player Capability Index Model (defer to previous leadership development series article of the Player Capability Index Model in the book *Your Trajectory Code* or the book *The Managerial-Leadership Bible Revised Second Edition* for reminder, reinforcement or insight) empowers you to accomplish this critical need!

7. **Self-Assessment, Peer Review & other Appropriate Constituents**

There is a body of thought about soliciting feedback from the individual to be assessed as a self-assessment. This can provide great insights when benchmarked against their job description. And this can be enhanced by additional data collection from those that one works closest with and or serves (internal and external customers) on a regular basis that could also provide accurate, timely, appropriate and thorough insights to performance and ways to attain, accelerate or improve performance through behavior KPIs.

8. **ROI**

Bottom line: While engagement, fun, sense of belonging and meaning in what one does is essential, let us also not forget that whether your business is a for-profit or non-profit (having owned/sold/operated business for three decades and served on the boards of numerous organizations for the past three decades), every individual has a revenue creation or substantiation factor they own – meaning the performance appraisal instrument and review coaching process is critical to ensure everyone brings and builds value into who they are, what they do, and how they serve their organization.



As an example if your organization has a revenue generating position (customer contact, sales, loan generation, account development, etc.) then there is always an 'x-factor' an organization has predetermined for that salaried/compensation position. If the position pays \$100K a year, then that person must generate 'x-revenue' a year to make their position a break-even position and every organization has an ideal revenue generation number that they expect each position to generate – You earn \$100K in compensation and you must generate \$3M in new revenue, while maintaining whatever portfolio you are also assigned for your market base. If a person is not on trajectory to generate or surpass their target goals, then the performance appraisal must reflect this – and the same holds true for any line position in an organization, always know the ROI variable!

9. **Budget Ample Time to Administrate the Review**

The reality of most people and organizations, is that so much is happening, that the one-on-one Quarterly, Semi-Annual or Annually performance appraisal review process is typically done late, hurried, with a less than optimistic attitude. This human capital realignment and human

capital development connection is a great opportunity and it should not be taken lightly!

10. **Calendar Checkup Points**

To accelerate the ROI of every person in the organization, as appropriate, you should calendar informal casual check-in and check-up conversations to avail yourself to the other person and to ensure forward movement from your formal performance appraisal session. This also sends a signal to others that the time and work you placed into the performance appraisal instrument documentation was not meant to be merely another work product for human resources, legal, compliance or the C-Suite, but truly is being done as a means for us to learn in real time how to always be better and to be inspired to attain our positional or career aspirations. Your informal calendared meet-ups also allow all to recognize we are accountable to our development, commitment and accomplishments.

Ultimately we are striving to capture minimum best practice behavior within the instrument to be demonstrated daily and repeatedly by individuals. You are working in partnership with the assessed individual to map out pathways to improved

commitment and performance, and to ensure we as an organization provide them with the trajectory for success. Sometimes with all your commitment to excellence the other person may struggle and this process will also serve as a reality check that we have a person in an incorrect position within the organization. It is here that we must explore if they have the talent and capacity to serve elsewhere and if so champion that transition. In other cases, none of this may be the reality, you may have an individual that needs to be removed from the organization and their consistent low performance will dictate that trajectory reality, at this point act fast.

And, just as you may assess those on your teams, your personal/professional development and accountability also should adhere to these same best practices by your supervisor/boss/employer/board for you!

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