

Mastering the Performance Evaluation Process

You Can't Manage What You Don't Measure

These conference materials are intended to accompany
the live audio program, CD or mp3 of the same title



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About Merge

Merge Gupta-Sunderji turns managers into leaders. A professional speaker, author, radio commentator, and consultant since 1988, Merge gives people specific and practical tools to help them achieve leadership and communication success. Over 44,000 managers in eight countries have participated in her engaging keynotes and facilitated workshops and obtained and practiced the tools to achieve leadership success.

Merge's client base is broad and varied including numerous professional associations, and mid- to large-sized corporations in the financial, energy and natural resources, and government sectors. Just some of her over 220 satisfied (and in most cases, repeat) clients include Capital One Financial Corporation (worldwide), Shell Oil, Mercer Human Resource Consulting, Certified General Accountants' Association of Canada, QVC Inc., Honeywell, Promotional Product Professionals of Canada, the International Association of Business Communicators, and Meeting Professionals International (MPI). With Meeting Planners International, Merge is one of only 43 people in North America to be recognized as a Platinum Series speaker.

Merge's insights come from first-hand experience. As a leader at one of Canada's premier oil and gas companies for over fourteen years, and a Board leader at a Credit Union for three years, she offers a unique blend of realism and humor that consistently engages and entertains her audiences! For almost two years, she was the well-known voice behind the national CBC radio column *The Softer Side of Business* heard coast to coast across Canada on CBC Radio One. She's an award-winning published author, writing for many well-known organizations and publications, including the very popular *Merge's Monthly Mega Minute*. The second edition of her book titled *Why Does the Lobster Cast Off Its Shell?* was published in July 2009. She has released an entire Leadership Series of educational audio CDs including titles on *Effective Delegation Skills*, *Making the Transition From a Technical to a Leadership Role*, *How to Effectively Manage Off-Site Employees*, *How to Make Your Meetings Useful and Productive*, *How to Give Effective Feedback*, *Having Difficult Conversations With Your Employees & Co-workers*, *Overcoming Negativity in the Workplace*, *How to Coach a Winning Team at Work*, *How to Communicate with Confidence, Clarity and Credibility*, *Motivating Employees Without Spending a Fortune*, *Mastering the Secrets of Persuasive Communication*, *Managing Employees with Lousy Performances*, *Unacceptable Behavior or Rotten Attitudes*, *Juggling Your Workload – Prioritization and time management skills for leaders*, *Emotional Intelligence – The keys to working more effectively with others*, *Are We Having Fun Yet? – Motivating Your Team and Maximizing Performance*, and *Personality Performance - The inside scoop on forming high-performing teams*. She is presently working on her latest book, *Power Tools for Leaders: Practical Strategies and Tactics to Build People*, a hands-on practical how-to guide for managers and supervisors.

Merge is a proud professional member of the Global Speakers Federation, and holds her Certified Speaking Professional (CSP) designation. The CSP designation is an international measure of speaking and platform excellence and is awarded only to those accomplished speakers who meet strict criteria and have a proven record of delivering client satisfaction. Less than 10% of the speakers who belong to the worldwide federation hold this professional designation.



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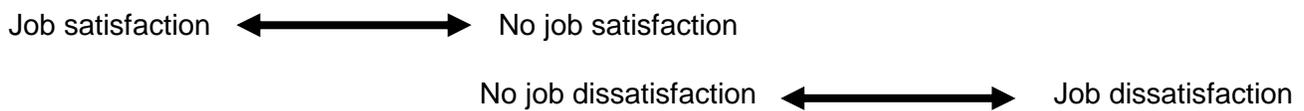
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Making the case for performance management

Merge's first philosophy of leadership

Herzberg's intrinsic and extrinsic factors



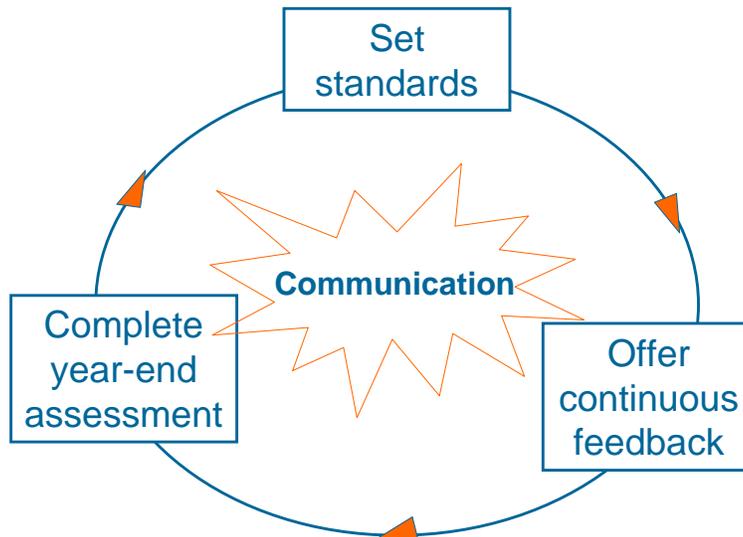
<u>Intrinsic factors</u>	<u>Extrinsic factors</u>
1.	1.
2.	2.
3.	3.

When the performance management process is done correctly, it is ...

- 1.
- 2.



A strategic approach to performance management



Set standards

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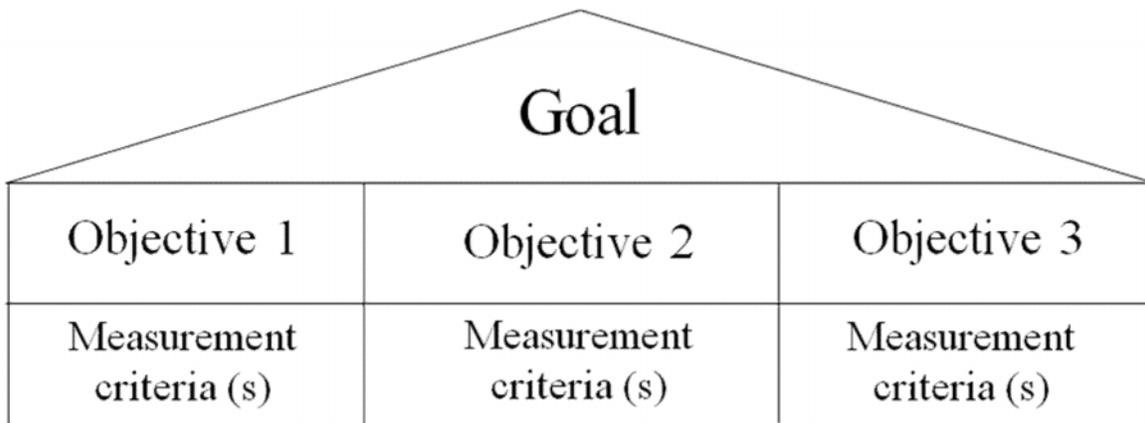
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Goals, objectives and measurement criteria



Goals	Why?	These are long-term, and they should be linked to the strategic goals of the organization i.e. vision, corporate mandate, organizational objectives, or business plan. It provides a context for employee and job-specific objectives.
Objectives	What?	These are the results and outcomes to be achieved during the review period. They need to be SMART. Discuss these with the employee for input on objectives that are challenging while still attainable. Strengthening a competency may be an objective.
Measurement criteria	How will you know that the objectives have been met?	These are observable demonstrations of competencies (knowledge, skills, abilities, behaviors) within the job that show how the objectives were achieved. Again, these need to be SMART. Discuss these with the employee for input.

Engage your employees in the process



For example:

Goals	Linked directly to company's strategic objectives	Client service – implement a public website redesign
Objectives	What? Make them SMART (in combination with measurement criteria)	<ul style="list-style-type: none"> Phase 1 of redesign developed and tested by July 1, 2012 Four focus groups conducted by September 1, 2012
Measurement criteria	How will you know? Give observable behavior.	<ul style="list-style-type: none"> Testing completed with 95% assurance by July 1, 2012 Focus group results published by September 15, 2012

Another example:

Goals	Linked directly to company's strategic objectives	Client service – provide prompt and responsive service to our clients
Objectives	What? Make them SMART (in combination with measurement criteria)	<ul style="list-style-type: none"> All telephone calls answered live All (e-mail and telephone) queries responded to within 24 hours Trust built with clients so issues can be addressed when senior partners are unavailable
Measurement criteria	How will you know? Give observable behavior.	<ul style="list-style-type: none"> Feedback from clients Feedback from senior partners Score of no less than 4.9 on client surveys

Offer continuous feedback

- _____
- _____
- _____
- _____



Complete the year-end assessment

- Have the employee fill in the “actuals vs. budget”
- Assign a number if appropriate to your organization
- Don’t avoid problems
- Use your management notes!

When assessing the performance level, consider the following:

- The results achieved i.e. actuals vs budget on the measurement criteria
- The competencies demonstrated (vs what was required)
- The processes used to complete the work i.e. did the employee understand and use the processes effectively

Communication is critical!

Convert opinion to fact

Encourage a two-way dialogue

Emphasize future development

End the discussion on a positive and supportive basis

