

# Training Wheels for Performance Reviews

How to address low employee engagement and under-performing leadership by applying a targeted process featuring goals, competencies, and CliftonStrengths assessments.

The Enhanced Performance Review Process



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Learner  
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Ideation



# Finding your strength when delivering career development guidance to your team

With real training wheels installed on your bike you get time to find and develop a new skill - finding your centre of balance.

Once the child finds their 'centre of balance' skill, the wheels can come off.





## Finding your strength when delivering career development guidance to your team

Similarly, when our ‘performance review’ skill is developed, the process will evolve to include a leader’s own creative talent and insight.

The process described here can be used literally until the leader develops their own best practices for guiding their team.



*“That’s my performance review?!  
Two thumbs up?!”*



## Problem Statement

Novice leaders typically won't have the skill to establish a relationship of trust with their team members for a couple of years,

Annual performance reviews then don't provide the recognition, direction, and career focus staff seek.





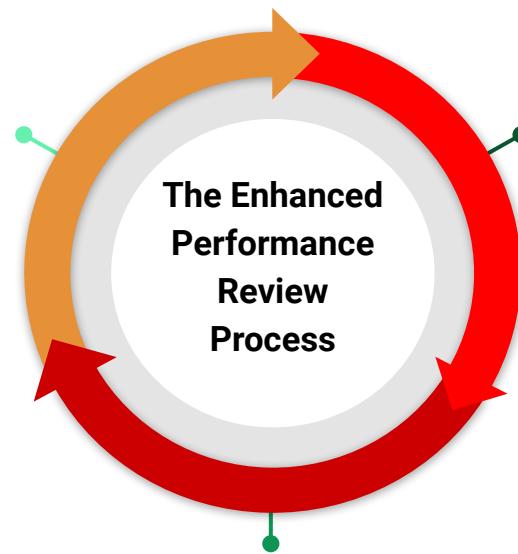
## Problem Statement

Where low engagement is allowed to persist, staff become increasingly disappointed with their career prospects at the firm and begin to look at alternate employment options.



# The Enhanced Performance Review process, (and the step we'll focus on here; Step 2).

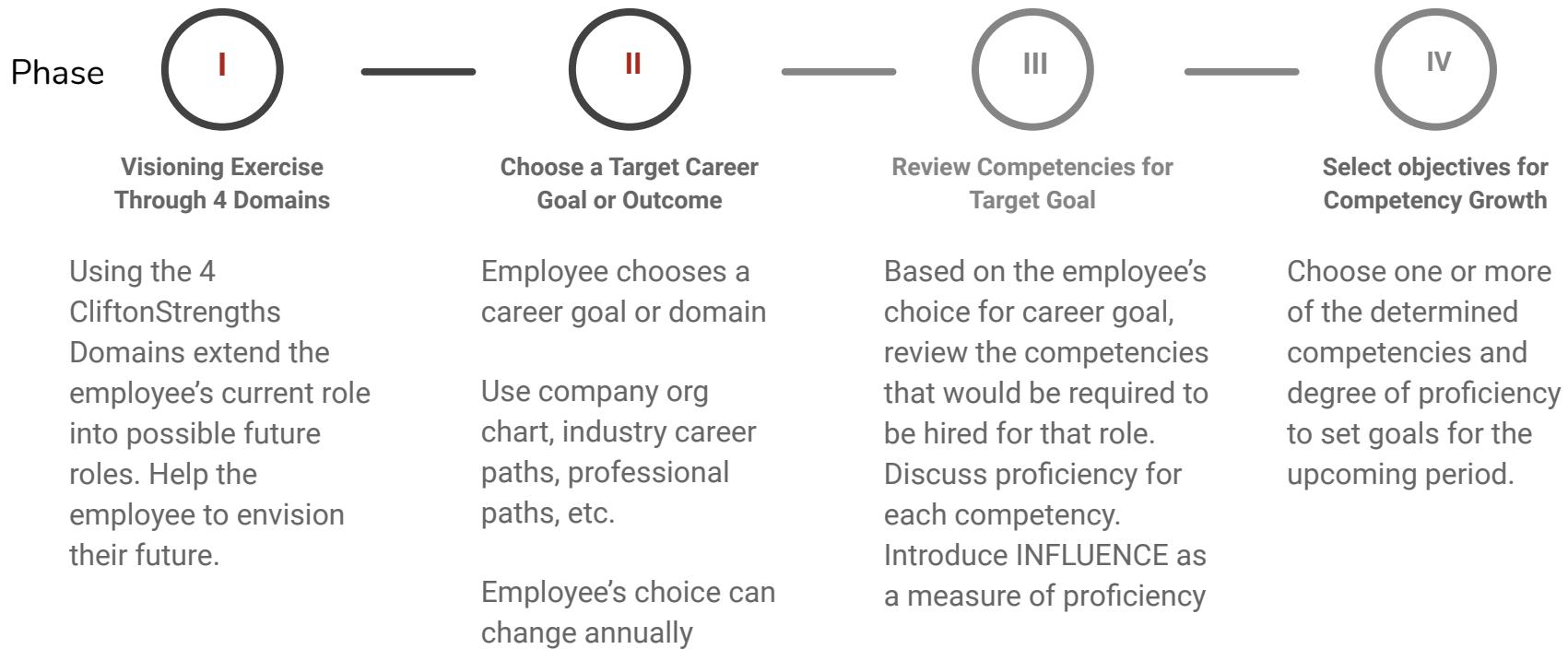
Step 1) Deliver CliftonStrengths coaching or similar coaching for each team member



**Step 2) Determine Career Goal and a target Competency Profile for the role. Identify specific competencies for near term development.**

Step 3) Assess progress in competency development at interim or annual review. Utilize evidence based proof of competency toolkit. Identify competency goals for next year

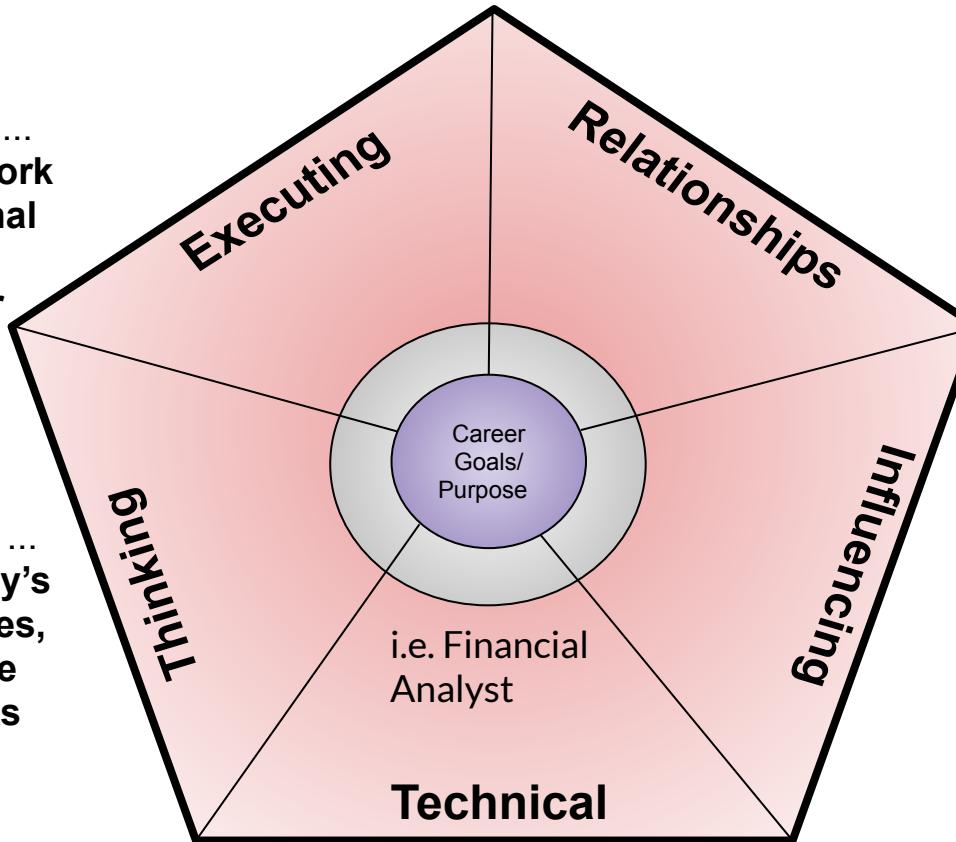
# Step 2) of The Enhanced Performance Review



# Facilitate Career Goal setting for someone

In the future I'd like to ...  
**"Make it Happen"**, work hard to reach personal and corporate goals, lead teams to deliver value to the dept.

In the future I'd like to ...  
**Analyze the company's products and services**, use my insight, make decisions, set targets and options for my department



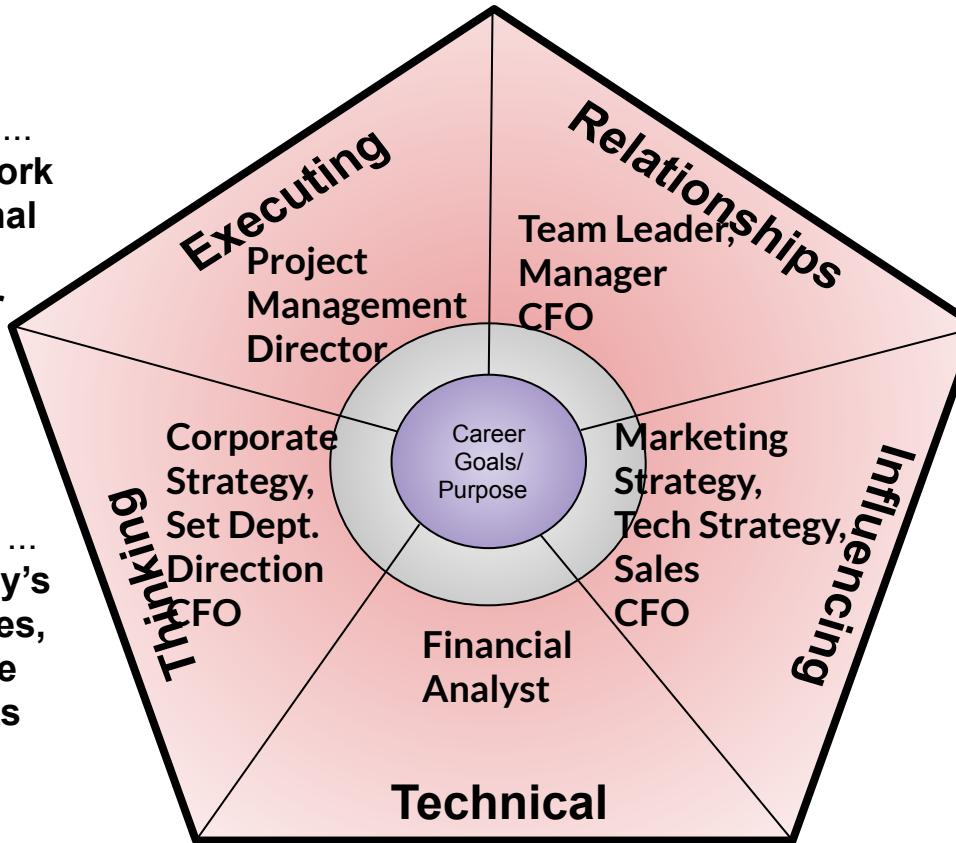
In the future I'd like to ...  
**Build Teams**, nurture people to achieve more, be a mentor and coach, improve the employee experience

In the future I'd like to ...  
**Promote Ideas** within the company, be a best practices representative and thought leader for my department

# Facilitate Career Goal setting for your team

In the future I'd like to ...  
**"Make it Happen"**, work hard to reach personal and corporate goals, lead teams to deliver value to the dept.

In the future I'd like to ...  
**Analyze the company's products and services**, use my insight, make decisions, set targets and options for my department



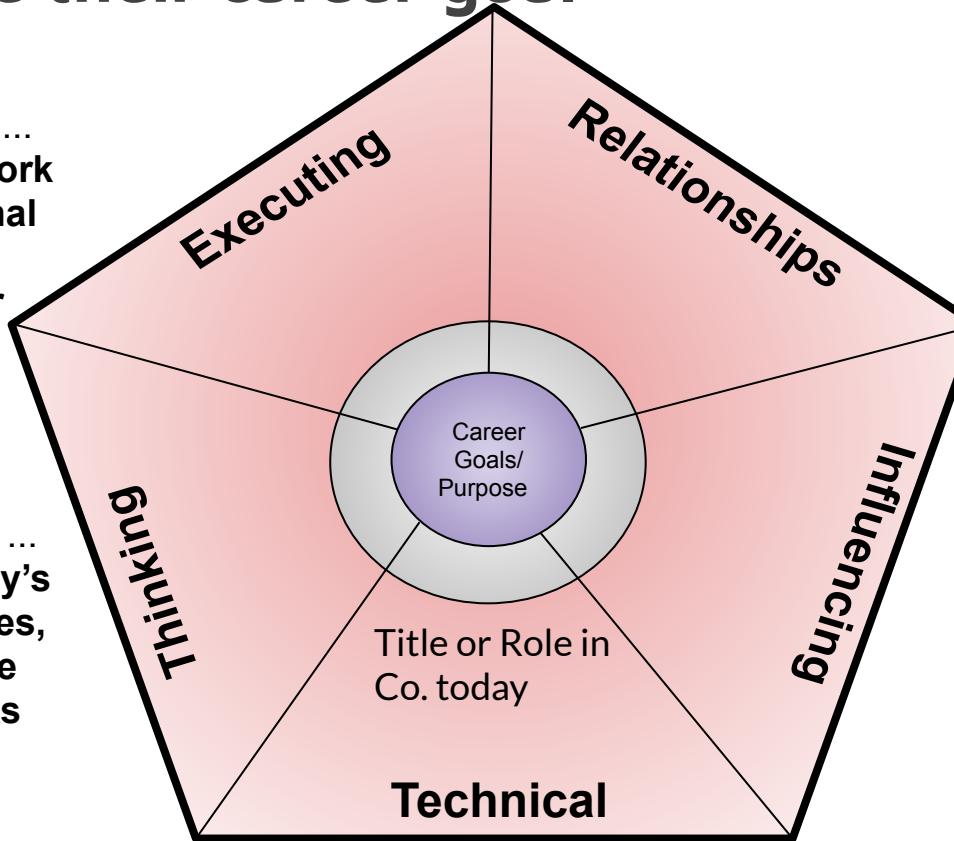
In the future I'd like to ...  
**Build Teams**, nurture people to achieve more, be a mentor and coach, improve the employee experience

In the future I'd like to ...  
**Promote Ideas** within the company, be a best practices representative and thought leader for my department

# Exercise: Let's practice helping one person choose their career goal

In the future I'd like to ...  
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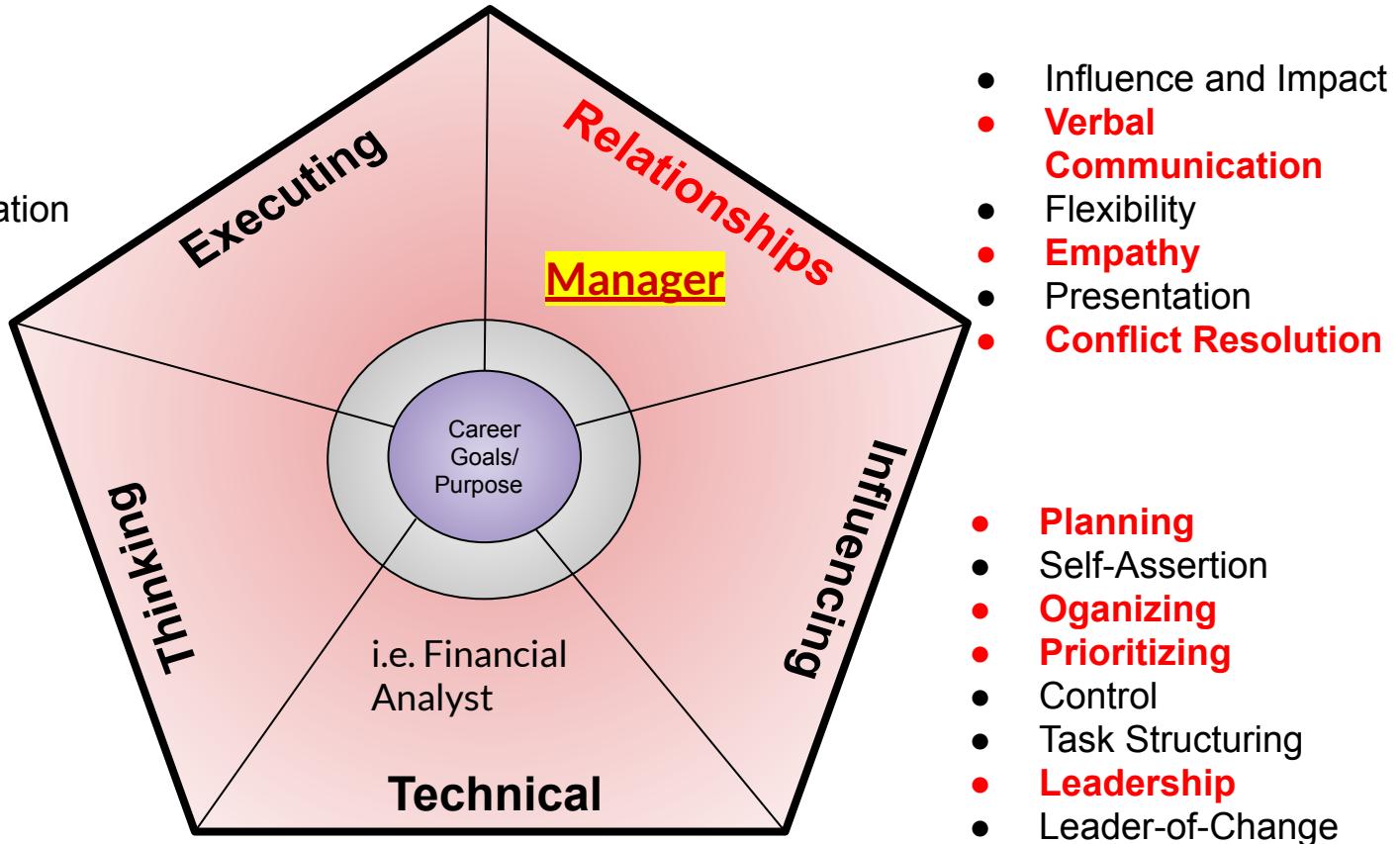
In the future I'd like to ...  
**Analyze the company's products and services**, use my insight, make decisions, set targets and options for my department



# Identify Competencies req'd for target role

- Initiative
- Decision Making
- **Tenacity**
- Written Communication
- **Customer Service**

- Creative
- Analytical
- Strategic
- Systems
- **Judgement**
- Adaptability



# Supporting model for The Enhanced Performance Review. Who are you INFLUENCING?



Competency proficiency levels can be measured by assessing the Influence the activity / employee had

## Examples

- Presentations made to one or more Business Units is demonstrating level 3 proficiency in Presentations
- Mentoring another member of my team is demonstrating level 1 proficiency in Mentoring



# Supporting Model. How to assess competency proficiency. ie. Customer Service Competency

<p><b>Customer Service Proficiency Level 1</b></p>	<p>1 - Understands the importance of excellent customer care for the continued growth of the company</p> <p>- Can deal with customers in a courteous manner, regarding own working area and own tasks, with direct guidance and supervision</p> <p>- Ensures that the immediate needs of customers are met in own work area</p>
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# Supporting Model. How to assess competency proficiency. ie. Customer Service Competency

<p><b>Customer Service Proficiency Level 2</b></p>	<p>2 - Can spontaneously identify customer needs in own work area</p> <ul style="list-style-type: none"><li>- Manages customers in an effective and professional manner regarding a broad range of responsibilities out of own initiative</li><li>- Able to project a professional and helpful image at all times</li><li>- Can analyze subtle clues and indicators that reflect customer needs or dissatisfaction</li></ul>
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# Supporting Model. How to assess competency proficiency. ie. Customer Service Competency

## Customer Service Proficiency Level 3

- 3 - Actively projects a helpful and professional image to customers at all times, impacting on the department or team as a whole
  - Actively anticipates and identifies customer needs prior to contact by analyzing subtle clues and indicators from both the customer and the immediate environment
  - Able to sell an appropriate product or service rendered by the department or team to the customer through the detailed analysis of information
  - Spontaneously and consistently initiates contact with prospective and existing customers with a direct impact on the department or team

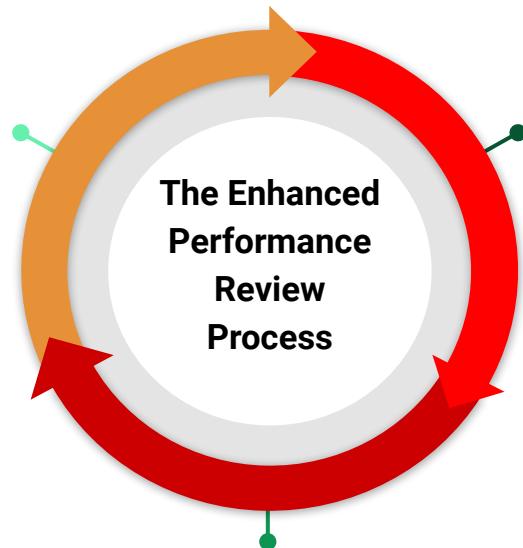
# Supporting Model. How to assess competency proficiency. ie. Customer Service Competency

## Customer Service Proficiency Level 4

- 4 - Proactively identifies a customer need for new products or services
- Demonstrates exceptional relationships with new and existing customers, impacting on whole corporation
- Utilizes customer input to develop market and customer strategy, on own volition
- Consistently has an accurate perception of customer needs and prevailing attitudes
- Actively engages with external customers by expanding existing business and initiation new business
- Proactively identifies customer needs prior to contact, by analyzing subtle clues and indicators from both the customer and the immediate environment
- Excellent knowledge of the corporation's full range of products and services rendered across a broad range of functions developed through own initiative
- Able to project a dynamic and professional image at all times

# The enhanced performance review process, and what we learned about Step 2)

Step 1) Deliver CliftonStrengths coaching or similar coaching for each team member



Step 3) Assess progress in competency development at interim or annual review. Utilize evidence based proof of competency toolkit. Identify competency goals for next year

## Step 2) We

1. Reviewed Strengths
2. Used CliftonStrengths Domains to vision a Career Goal
3. Identified Competencies associated with the Goal
4. Established Influence as a measure of proficiency
5. Set Objectives for competency development in next period.

# Training Wheels for Performance Reviews

Thank you! Your centre of balance for career development and staff reviews lies just ahead





# Supporting information, Gallup Q12

Gallup's Q12 survey of employee's sentiments about their workplace experience covers a range of topics is widely used to assess Employee Engagement.

Many of the topics fall squarely in the range of topics typically placed in the hands of a direct supervisor to address.





## **Supporting information, what employees want**

Surveys of employees working at firms with low employee engagement indicate corporate deficits in many areas.

Employees' calls for improvement appear in three areas;

1. recognition for today's successes
2. advice on next steps for skills development
3. support for readiness to reach career goal

Citation

[www.challengeconsulting.com.au/announcements/the-top-10-things-employees-want-from-their-job](http://www.challengeconsulting.com.au/announcements/the-top-10-things-employees-want-from-their-job)



## **Supporting information, causes of low engagement scores**

According to HR firms and behavioural sciences organizations, many of the factors causing low employee engagement are an outcome of novice skills among supervisors when delivering career guidance and mentoring.

Citation [www.insperity.com/blog/low-employee-engagement](http://www.insperity.com/blog/low-employee-engagement)