PAYDATA WORKFORCE SOLUTIONS

Insight

Performance Evaluations and Effective Coaching

Presented by
Aimee Pedretti, GPHR

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Agenda

- Setting the Stage
- Coaching
- Performance Evaluations
- Q & A

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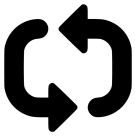
What are Performance Evaluations?

Purpose



Frequency

Integration
with daily work

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What is Coaching?

Purpose

Frequency

Integration with daily work

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Q. Should I Use Coaching or Performance Evaluations?

A. BOTH!

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Coaching Definition

- "style of management"
- "questions"
- "advance their development"

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Coaching Basics

- Owned by the manager and the employee
- Regular and open communication
- Support and encouragement of employee from both manager and the company

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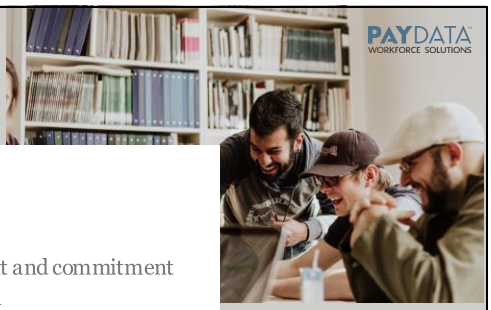

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Outcomes of Effective Coaching

- Increased employee engagement and commitment
- Accelerated talent development
- Improved performance and productivity
- Decreased turnover

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Coaching vs. Progressive Discipline

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Basics

Progressive discipline includes:

- Verbal counseling
- Written warnings
- Other consequences (suspension, performance improvement plans, final warnings, etc.)
- Termination

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Limits

- Can lack flexibility
- Change likely to be motivated by fear, not actual employee growth
- Process is owned entirely by management and HR
- Often seen as a formal step before termination

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Appropriate Use

- Misconduct
- When coaching has been ineffective

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Case Scenario:
Coaching vs. Progressive Discipline

Maya runs a marketing firm with clients that are charged by the hour. Her employee, Will, is responsible for generating and sending out invoices to clients by the 5th of each month. For the last two months Will has not gotten the invoices sent out until the 10th. This has caused a delay in clients paying and, in turn, has made making payroll a bit too close for comfort.

How can Maya handle this?

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Case Scenario:
Coaching vs. Progressive Discipline

Let's say that when Maya approaches Will and says "Help me understand why the invoices have not been sent on time for the last two months," he responds in a very defensive way.

How should Maya react?

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Creating a Coaching Environment

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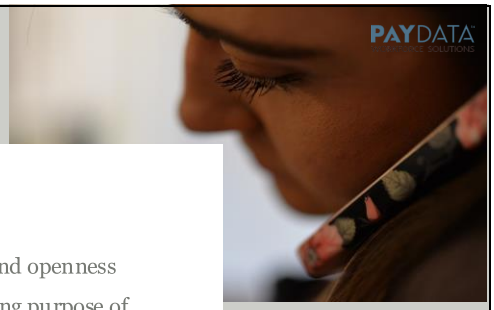

Trust and Open Communication

- Encourages full participation and openness
- Allows employees to see coaching purpose of focusing on their development
- Ensures issues don't go unaddressed

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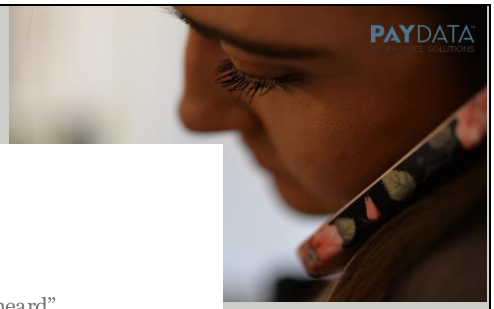

Trust and Open Communication

- Spend time with employees
- Listen and let employees feel "heard"
- Set an example with your actions
- Be open and honest with tough decisions and feedback
- Encourage employees to be themselves and give input
- Provide recognition

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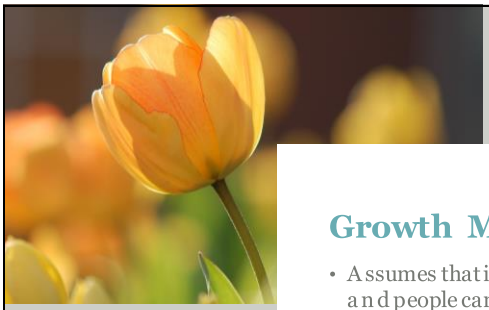

Growth Mindset

- Assumes that intelligence and ability aren't fixed and people can learn through effort and trying new things
- Applies to both employee and company
- Employee must be willing to put forth effort and try new solutions
- Company must be ready to learn as well and to value input from all levels

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Shifting to a Growth Mindset

- Assume a positive intent
- Listen more than you talk
- Allow employee to suggest solutions; ask before you advise!
- Don't say what you would have done differently
- Don't interrupt, be distracted, or focus on what you will say next

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Asking Coaching Questions

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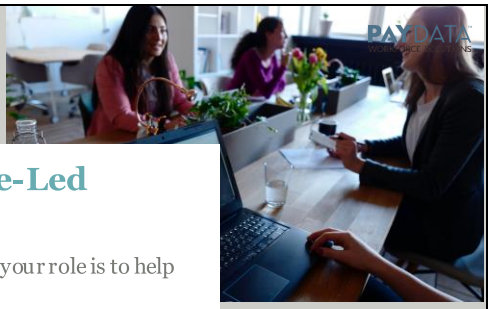

Facilitate Employee-Led Solutions

- The employee has the solution, your role is to help them locate it with questions
- Keep questions broad and open-ended
- Avoid questions that start with "why"

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Use Open-Ended Questions

Questions should **not** be able to be answered with "yes" or "no"

Examples:

"What is the status?"
vs. "Are you finished?"

"What can you learn from this?"
vs. "You won't do that again, right?"

"Tell me your understanding of…"
vs. "Is this clear?"

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Having Coaching Conversations

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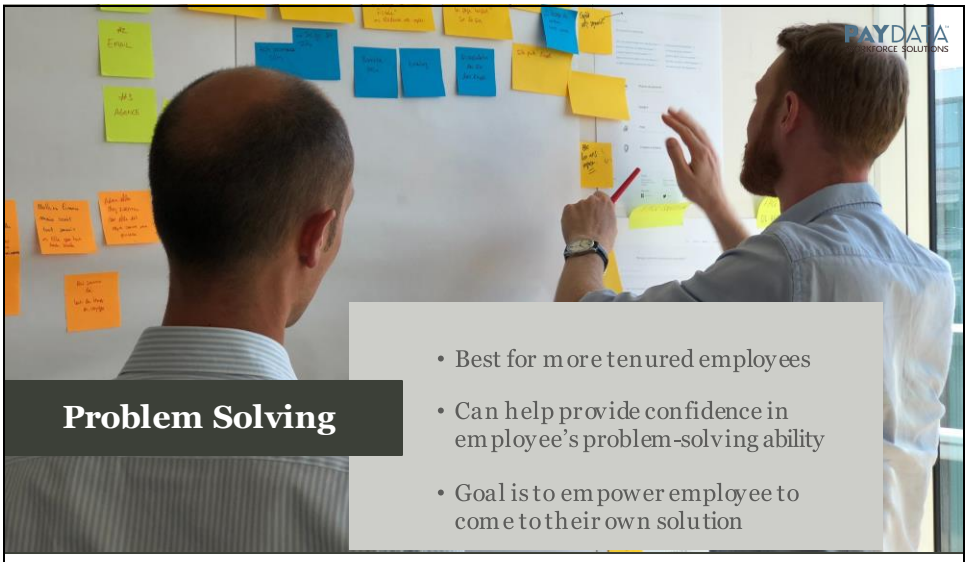

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Problem Solving

- Best for more tenured employees
- Can help provide confidence in employee's problem-solving ability
- Goal is to empower employee to come to their own solution

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Problem Solving

- What have you done so far? (or) What is happening right now around [this issue]?
- What do you propose?
- What is your goal/desired outcome in this situation?
- What are some different ways that you might approach this situation?
- What are the pros and cons of each approach?
- What approach seems most effective to you in reaching your goal?

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Project Management

- Envision that you are finished with this. Describe the final product.
- If you need to complete this project by November 10th. . .
- If you will finish the project on time, what tasks do you need to concentrate on in the short term?

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Project Management (cont.)

- Who are the stakeholders for this project? (Who needs to be involved?)
- What can you do to ensure success? How will you do that?

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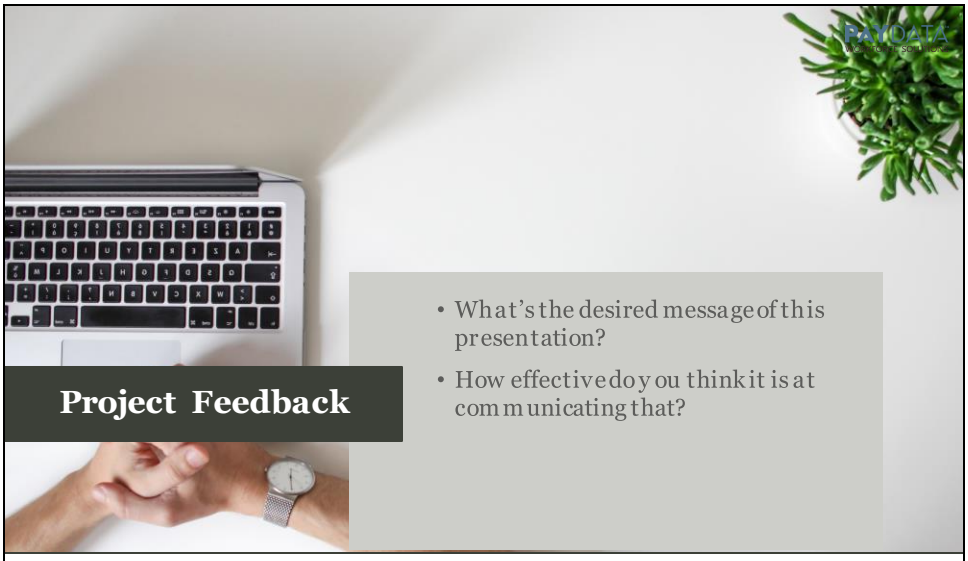
Project Feedback
• What's the desired message of this presentation?
• How effective do you think it is at communicating that?
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Performance Evaluations

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Performance Evaluation Basics

Definition:
"The process of reviewing how well employees perform their duties during a specified period of time."

Purpose:

- Giving positive performance feedback & recognition
- Discussion of areas of improvement
- Identifying development opportunities for the future
- Link performance to compensation decisions

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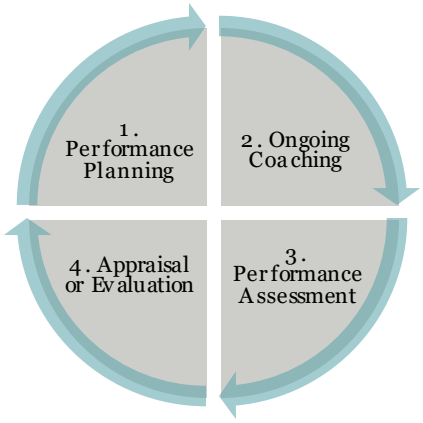
Performance Management Cycle



Feedback and support are crucial at every step.

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Creating a Performance Evaluation

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Timing

- Frequency
- Pros and cons of annual, semi-annual, and quarterly meetings
- Importance of follow through with set schedule

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Content

- No single answer for each situation
- Possible pieces: manager review, self-assessment, co-worker assessment, goal setting

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Manager Review

- Scale or competency rating
- Specific project feedback
- General feedback

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Self-Assessment

- Will generally mirror the manager assessment
- If using a scale or competency rating, make sure to set guidelines for calibration (e.g. "we expect that most employees doing what is asked will score a 3 of 5")
- Consider a section for employee to express anything else they did not think was adequately covered

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Co-Worker Assessment

- "360 degree" review
- Consider who to ask for feedback from
  - Not everyone will understand the specifics of another position
  - Can be hard to ensure anonymity

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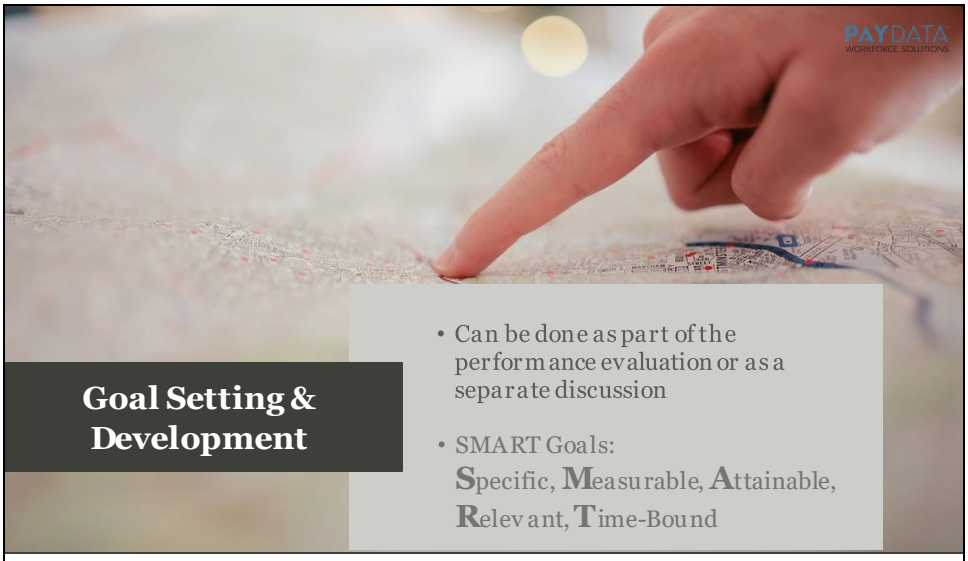
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Goal Setting & Development
• Can be done as part of the performance evaluation or as a separate discussion
• SMART Goals:
Specific, Measurable, Attainable, Relevant, Time-Bound
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The Meeting & Follow Up

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Performance Evaluation Meetings

- Preparation
- Leading, not monopolizing, the discussion
- Taking notes

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Follow Up

- Completing/revising documentation and including in employee file
- Calendar any meetings necessary to follow up on specific action items
- Informal and frequent check ins on goals

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Q & A

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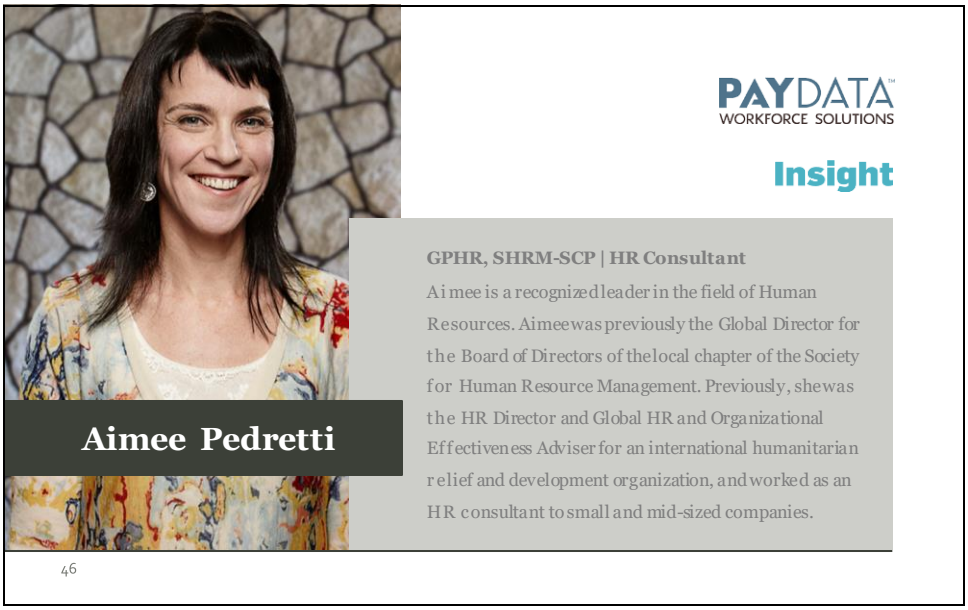
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Insight
Aimee Pedretti
GPHR, SHRM-SCP | HR Consultant
Aimee is a recognized leader in the field of Human Resources. Aimee was previously the Global Director for the Board of Directors of the local chapter of the Society for Human Resource Management. Previously, she was the HR Director and Global HR and Organizational Effectiveness Adviser for an international humanitarian relief and development organization, and worked as an HR consultant to small and mid-sized companies.
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