



**"T-N-T Series" 2017**

## Building a Better Appraisal Program

*"Now that's fair!"*

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# Human Resources Areas?

- Staffing
- Benefits
- Payroll
- Organization Development
- Employee Development



# Talent Development Elements

## Business Results

- Workplace alignment
- Efficiency Standards
- Measurements of Achievement



## The Employee

- Hire date
- Job changes (what/when)
- Interview history
- Background
- Personality
- Compensation
- Personal events
- Manager history
- Demographics



## The Job

- Job Design
- Policies
- Procedures
- Job Execution
- Measurements



## Performance Accountability

- Results KPI's
- Task Accuracy
- Observations
- Learning Curve
- "Trainability"



## Training & Development

- Learning Design
- Course Catalog
- Registration
- Course feedback
- Career Planning



# Pay For Performance

“X” % on your annual appraisal qualifies you for the “A to B” % pay raise.

“Y” % on your annual appraisal qualifies you for the “C to D” % pay raise.



# Pay For Results

“X” # of widgets >>> with “A” quality level  
yields you “purple” “compensation.”

“X” # of widgets >>> with “B” quality level  
yields you “orange” “compensation.”

“Y” # of widgets >>> with “A” quality level  
yields you “green” “compensation.”

“Y” # of widgets >>> with “B” quality level  
yields you “blue” “compensation.”

# Why Are We Talking About This?

Because **money** matters!  
When it comes to **attitude**.



## Consider the Scenarios:

Scenario 1: a **good** performer to whom the Business Unit Manager is going to give a **good** compensation boost.

*Fair is fair, but what is the lasting impact?*

## Consider the Scenarios:

Scenario 2: a **good** performer to whom the Business Unit Manager is going to give a **modest** compensation boost.

*Fair is fair, but what is the lasting impact?*

## Consider the Scenarios:

Scenario 3: a **poor** performer to whom the Business Unit Manager is going to give a **good** compensation boost.

The employee: *"What a nice boss!!"*

The CFO: *"What a chump!!"*

## Consider the Scenarios:

Scenario 4: a **poor** performer to whom the Business Unit Manager is going to give a **modest** compensation boost.

The employee: *“What a nice boss!!”*

The CFO: *“They both have to go!!”*

# Why Are We Talking About This?

Because **money** matters!  
When it comes to **attitude**.

But **results** come from  
**Attitude + ABILITY.**

Ability is only developed by  
awareness and constant vigilance.

# Key Point #1 - Appraisal Programs Have

- Accountability to KPI Results: an Annual Review
- Accountability to job task performance:
  - **Continual** focused and structured observation and coaching, based on clear techniques and standards (which are developed by the HR group's awesome learning environment) a.k.a. "Performance Reviews"

# Annual Reviews Create:

- Accountability to KPI Results
- A formal documentation process
- Clearly identified development need
- Measurement-based results assessment



# Performance Reviews

- Focus on performance of a **specific** job task, and only one at a time
- Based on **observation** that is guided by either a check sheet or expert-level ability, but does not have to be the “boss”
- Include a goal and Action Plan
- Also capture “Best Practices” to be leveraged for development of others
- Strength & Weakness “inventory” can be done as of a point in time, then develop one weakness at a time

# Performance Reviews Create:

- Actual awareness of what needs to be done differently
- Action plans at the tactical level
- A historical reference that is easy to use to create the Annual Review

## Key Point #2 - Objective Based

Annual Reviews and Performance Reviews both use measurements of task output

## Employee Accountability Reviews

Reviews for this employee: 0

The current review is number 1

🖨️
📄
🗑️
➡️

⏮️
⏪️
⏩️
⏭️

Reviewed By

Review Notes

**Quick Fill: Load Factors For Job**

First Discussed On

Scheduled Review

Actual Review

Accountability Factor	Scores [1=low; 5=high]			Action To Be Taken
	Employee	Manager	Both	
	0	0	0	
	0	0	0	
	0	0	0	
	0	0	0	
	0	0	0	
	0	0	0	
	0	0	0	
	0	0	0	
	0	0	0	
	0	0	0	
	0	0	0	
	0	0	0	
	0	0	0	
	0	0	0	
	0	0	0	

**Peer to Peer Comparison**

Peer Comparison on:

Current Job in Company:

Initial Account Manager:

Employee	Name	Date
Emily Shreves		6/6/07
Don Landgraf		8/16/06
Gordon Barker		8/12/99
Don Herdfield		4/20/96

**Performance Comparison Worksheet for Peer Group**

Performance Measure	Date	Y
	7/1/07	\$2,899
	10/1/07	\$2,477

**Total**

Employee Reviews

### Performance Reviews for Aaron Hopman

Reviews for this employee: 0  
The current review is number 1

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**Job Task**

Establish Initial Rapport.

**Rating**    DP ▾

To Be Addressed? ☒

**Reviewed By** Ken Jones ▾

**Observed On** 10/11/2016

**Scheduled Review** 10/28/2016

**Actual Review** 10/28/2016

**Performance Observation**

First first visits, Aaron is in too much of a hurry to discuss business needs and does not take the time to settle into the interpersonal aspect of meeting a new person, and allowing that person to get comfortable with him first.

**Notes**

This could be caused by Aaron's perception that the goal of the first visit is to close business.

**Financials**

Person	Date	Value
Emily Stevens	7/1/01	\$236,364.76
Emily Stevens	8/1/01	\$139,264.11
Eric Landgraf	7/1/01	\$303,973.26
Eric Landgraf	8/1/01	\$447,988.80
Gordon Baxter	7/1/01	\$2,174,614.28
Gordon Baxter	8/1/01	\$1,969,454.03
Jay Thompson	7/1/01	\$20,388.12
Jay Thompson	8/1/01	\$20,388.12

[illegible]

# Key Point #3 - Historical Perspective

Annual Reviews use historic Performance Reviews, and both use historic measurements.

The image displays three overlapping screenshots of a performance review system interface.

**Top Screenshot: Employee Reviews**

Performance Reviews for Aaron Hopman

Reviews for this employee: 0  
The current review is number: 1

Job Task: Establish Initial Rapport. Reviewed By: Ken Jones

Rating: DP To Be Addressed? ☒

Observed On: 10/11/2016  
Scheduled Review: 10/28/2016  
Actual Review: 10/28/2016

**Bottom Left Screenshot: Issue Goals and Actions**

Issue To Be Addressed: Andy Grantham: Not doing this well.

Issue Goal: Andy Goal 1: Andy Grantham will be doing "this" to "this" degree by "this" date.

Notes: Andy's goal notes

Note: An issue may have more than one goal, and a goal may have more than one action.

Goal Actions:

Action to be taken	Est Start	Start	Est Complete	Complete	Results
Andy Goal 1 Action 1: Take the BEST training class	7/1/2016	7/1/2016	7/5/2016	7/5/2016	The techniques are established.
Andy Goal 1 Action 2: Attend joint Sales calls with Bob Jones	7/8/2016	7/8/2016	7/31/2016	7/31/2016	Andy can explain how Bob engages.

**Bottom Right Screenshot: Best Practices**

Performance Measurement: Leads Count

Task: Find sales leads

Employee: Jenny Jergens Phone: (717) 464-9979

Date Reviewed: 9/1/200

Performance Observation:

When Jenny calls on a company, if it is a good potential customer, she makes sure she doesn't leave that area until she finds at least two other possible leads.

Notes:

If Jenny has other leads in the area, a full day of sales calls can be scheduled the next time she must drive to the area to call on one potential customer.

# Key Point #4 - Task Focus

Use Simple Things in Powerful Ways: Job Tasks

**TODAY**

## **Job Description**

- Task 1
- Task 2
- Task 3
- Task 4
- Task 5
- Task 6

**TOMORROW**

Training Learning Outcomes

KPI Results Accountability

Performance Reviews:  
Coaching and Best Practice  
Awareness

# Leverage Your Work

## Use Simple Things in Powerful Ways: Job Tasks

**TODAY**

**Job Tasks**

Job: Sales Executive Series: Grade: Code:

Description: S&S product

Code:

☐ Delete this job from the database There are 7 jobs in the database. The current job is # 2

View Job Tasks INDIVIDUALLY View Job Tasks as LIST

Task: First sales leads

Percent: 15%

Notes: Sales Executives are the only ones who seek new business.

NOTE: Task details are managed in the Tasks Maintenance area of P.E.R.F.O.R.M. Record: 351 of 8

Departments With This Job: Interview Questions Career Path

This job is in this (these) department(s):

Department	Division
Sales	RSM Solutions
Sales	RSM Training
Sales	Standard Homes
Sales	CKV Technicians
Sales	Halifax Seafood

Job Success Factors: Job Accountability Factors

Set research during seek & prospect

High number of sales calls per week

**TOMORROW**

Training Learning Outcomes

**Learning Activity Information**

Strategic Selling Ref # 1 Category Sales

Description: Leads, territory management, research, first visit, needs assessment, quantifying value, and program recommendation

Optimum Group Size: 24

☐ Delete?

Sessions when this activity will occur

Date	Time	Location	Class Size	Class Days
20-Sep-93	9:00 - 5:00	Seattle Center	60	2 days
14-Sep-93	8:00 - 5:00	Main conference room - headquarters	60	2 days
09-Sep-93	9:00 - 5:00	Bell Harbor Conference Center	60	2 days

Double-click on the LOCATION field to view decisions to the location.

Activity Notes

To work with learning activities ...

Type: ☒ Class ☐ CBT ☐ Self Study ☐ Other

Work Placement: ☐ Internal ☐ External

Provider: Sales Training Group

This activity develops these ...

Skills:

- Account Segmentation Use
- Communication - Oral
- Internet Navigation
- Investment vs. Durability Grid Use
- Mathematics - Basic
- Telephone Skills - Basic
- Time Management

Add a new skill from which to pick

Show only for a specific SKILL Show only for a specific KNOWLEDGE Show only for a specific BEHAVIOR

Show ALL Learning Activities

KPI Results Accountability

Performance Reviews

**Cultivisor** is ready, willing & able to help you cultivate your workforce!



**Thank You!**

