

Human Resource Associates

Employment Consultants

The Performance Evaluation Part II-The Biggest Mistake

In our last issue of **Personnel Notebook** we reviewed ten common mistakes made by supervisors and managers when doing performance evaluations. In this issue we are going to add one more. And this may be the one that trumps all the others.

Mistake Number 11: Failing to understand the message and failing to be understood.

During the actual performance evaluation, too many managers fail to put into clear language what needs to be continued, what needs to be stopped, what needs to be changed and what goals to set.

“Needs Improvement” just doesn’t fully communicate the message. You need to express more fully what you mean by the terms:

- Meets / Exceeds Expectations
- Needs Improvement
- Goals To Achieve

Paul Falcone, an HR professional and author of several best selling books on HR management, has also written a valuable reference book on communicating effective performance reviews for the

American Management Association (AMA). Let’s take a look at some of his recommendations for specific job performance issues and the terms you might use during the performance evaluation to express these three standards.

Attendance and Punctuality (Reliability)

Meets / Exceeds Expectations

- Arrives at job site and meetings on time.
- Attendance perfect during this review period.
- Never misses work without proper and timely notice.
- Is always willing to work longer hours on little or no notice.
- Consistently completes assignments on schedule.

Needs Improvement

- Fails to follow call-in procedures in a timely manner.
- Frequently arrives late to job site and meetings.
- Generates excessive personal phone calls throughout the day.

- Consistently uses the maximum number of sick days.
- Does not return e-mails and phone calls in a timely manner.
- Patterns his sick days around holidays and vacations.

Goals To Achieve

- Speak to me in person if you call in for time off.
- Arrive at job site and meetings on time, prepared and ready to work.
- Provide medical documentation for any leave in excess of three days.
- Arrange for backup if you are going to be out.
- Check with me each night before you leave to see if I need you for anything else.
- Achieve perfect attendance during the coming review period.

Communication And Cooperation

Meets / Exceeds Expectations

- Regularly asks for immediate and constructive feedback to ensure understanding.
- Remains open minded and willing to entertain other's ideas.
- Communicates clearly with coworkers and customers who do not speak English fluently.
- Explains complicated issues clearly and concisely.
- Posses a knack for summarizing and communicating end results.
- Is not afraid to say, "I don't know" or "I'll check on that and get back to you".
- Acts as a calming influence when faced with anger or resentment.
- Provides ongoing feedback in a spirit of constructive criticism.

Needs Improvement

- Creates a territorial atmosphere.
- Readily attributes blame to others.

- Tends to "foxhole" and isolate himself.
- Has difficulty boiling down issues to understandable statements.
- Fails to communicate bad news upward.
- Engages in shouting matches.
- Is too "wordy" to communicate a clear and compelling message.

Goals To Achieve

- Cultivate a culture of openness and information sharing.
- Ensure that those reporting to you are informed of each other's activities.
- Readily admit if you're not sure of an answer.
- Readily share information and resources that support our business objectives.
- Listen and respond to others appropriately using a respectful tone.
- Do not leave callers on hold for more than 30 seconds.
- Stop others from speaking to you in a derogatory manner.
- Avoid blaming or censuring others publicly.

Customer Satisfaction

Meets / Exceeds Expectations

- Works well with clients and staff members.
- Follows up with clients to ensure no one feels forgotten or lost in the process.
- Consistently answers the phone with a smile and a friendly hello.
- Outlines the steps she will take to resolve a problem.
- Has become the "go-to-guy" for clients who seek advice for problems.
- Excels at providing feedback to even the most difficult customers. Is able to switch from Spanish to English and back again.

- Skillfully overcomes customer's objections.
- Has developed a loyal customer base and a high rate of repeat business.
- Overcomes objections in a logical and conversational manner.

Needs Improvement

- Receives low scores from customer satisfaction surveys.
- Does not manage customer's expectations by explaining reasons for delays.
- Has difficulty saying *no* or tactfully telling customers they must wait their turn.
- Has received numerous customer complains for failing to follow up as promised.
- Cannot demonstrate sufficient knowledge of company products and services.
- Misses opportunities for cross selling and overcoming initial resistance.
- Displays sarcasm and alienates those looking for help.
- Has little patience for customers with "dumb" questions.

Goals to Achieve

- Make sure clients understand that you're on their side.
- Demonstrate total commitment to outstanding customer service.
- Share information and resources readily.
- Never appear to talk down to or patronize customers.
- Effectively prioritize your workload based on your customers needs.
- Proactively inform customers of pending delays.
- Always put the customer's needs above your own.
- Learn to tactfully tell customers *no*, when their demands or expectations cannot be met.

- Follow up with customers after every sale or job completion.

Job Knowledge

Meets / Exceeds Expectations

- Demonstrates a thorough knowledge of his key responsibilities.
- Is technically adept and effective at all facets of her work.
- Serves as our resident expert for technical problems and training.
- Knowledge of company goes well beyond his area of responsibility.
- Takes a "strategic business partner" approach to his work.
- Is keenly aware of key players at competitor firms.
- Learns about other department's key initiatives and goals.
- Maintains an extensive network of industry associates.
- Documents common procedures and steps as an internal "trouble shooting" guide.
- Spearheads seminars to cross train others.
- Keeps abreast of changes in her filed.

Needs Improvement

- Has little awareness of our competitors.
- Has difficulty locating information when needed.
- Is not adequately versed in key aspects of his work.
- Produces more errors than someone with her experience should.
- Produces substandard work that is often not on time.
- Depends too heavily on specific step-by-step instructions from supervisor.
- Fails to think issues through to their logical conclusions.

Goals To Achieve

- Review your job description to ensure you understand all aspects and accountabilities of your job.
- Enroll in an extension course to enhance your skills and knowledge.
- Engage in rotational “job shadowing” exercises to learn other’s roles.
- Continuously develop the breadth and depth of your skills.
- Gain a deeper understanding of your customer’s needs and expectations.
- Research our competitors.
- Study our annual report to understand relevant trends and forecasts.
- Initiate departmental lunch-and-learn seminars to cross train your staff.
- Become our departments “go- to” person for special projects.

Time Management

Meets / Exceeds Expectations

- Consistently approaches her workload in a proactive manner, with a “prejudice” for action.
- Does not allow distractions or obstacles to get in the way of meeting deadlines.
- Ensures that his day is planned as productively as possible.
- Excels in pushing projects forward despite bureaucratic slowdowns.
- Ensures a consistent workflow despite interruptions.
- Effectively manages multiple projects rather than one project at a time.
- Holds her staff accountable for beginning work on time and finishing on schedule.

Needs Improvement

- Gets easily sidetracked and wastes time.
- Regularly arrives late to meetings.
- Has difficulty accounting for how he spends his time.

- Fails to use available technology for productivity.
- Is frequently disorganized.
- Overwhelmed by an average workload.
- Always busy but has little to show for it.

Goals to Achieve

- Take a course on effective time management.
- Weed out or eliminate time wasters.
- Learn to say no to interruptions.
- Learn to prioritize ruthlessly.
- Demonstrate respect for other’s time.
- Keep a written daily schedule and practice following it.
- Juggle competing projects more effectively.
- Learn to delegate effectively.

In our next issue of **Personnel Notebook** we will continue with guidelines for communicating such performance issues as leadership, management, personal style, productivity and safety.

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