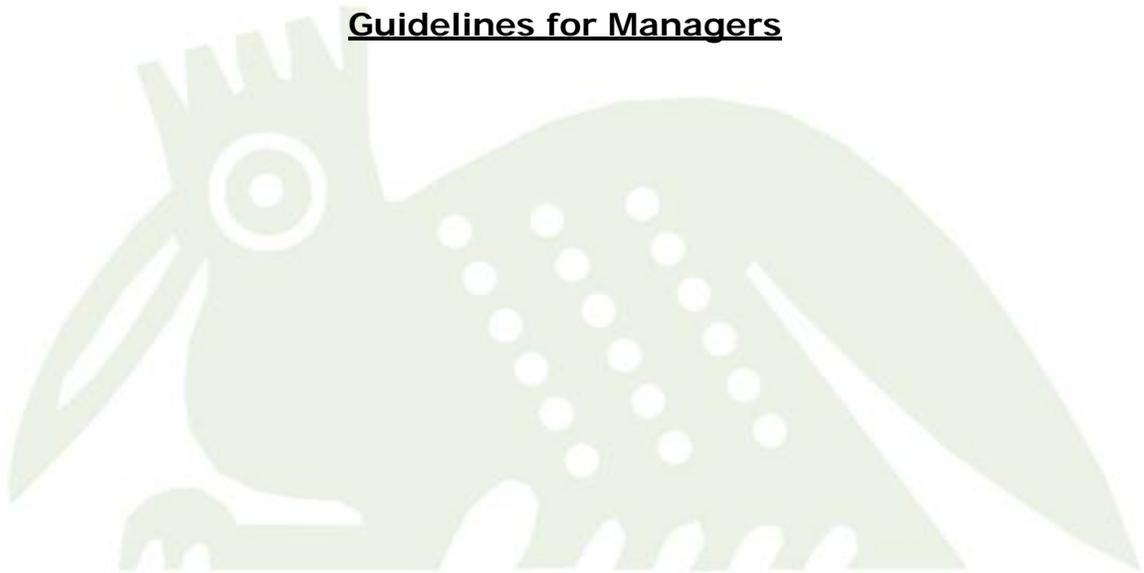




# Managing Performance & Developing People

## Guidelines for Managers



## Managing Performance

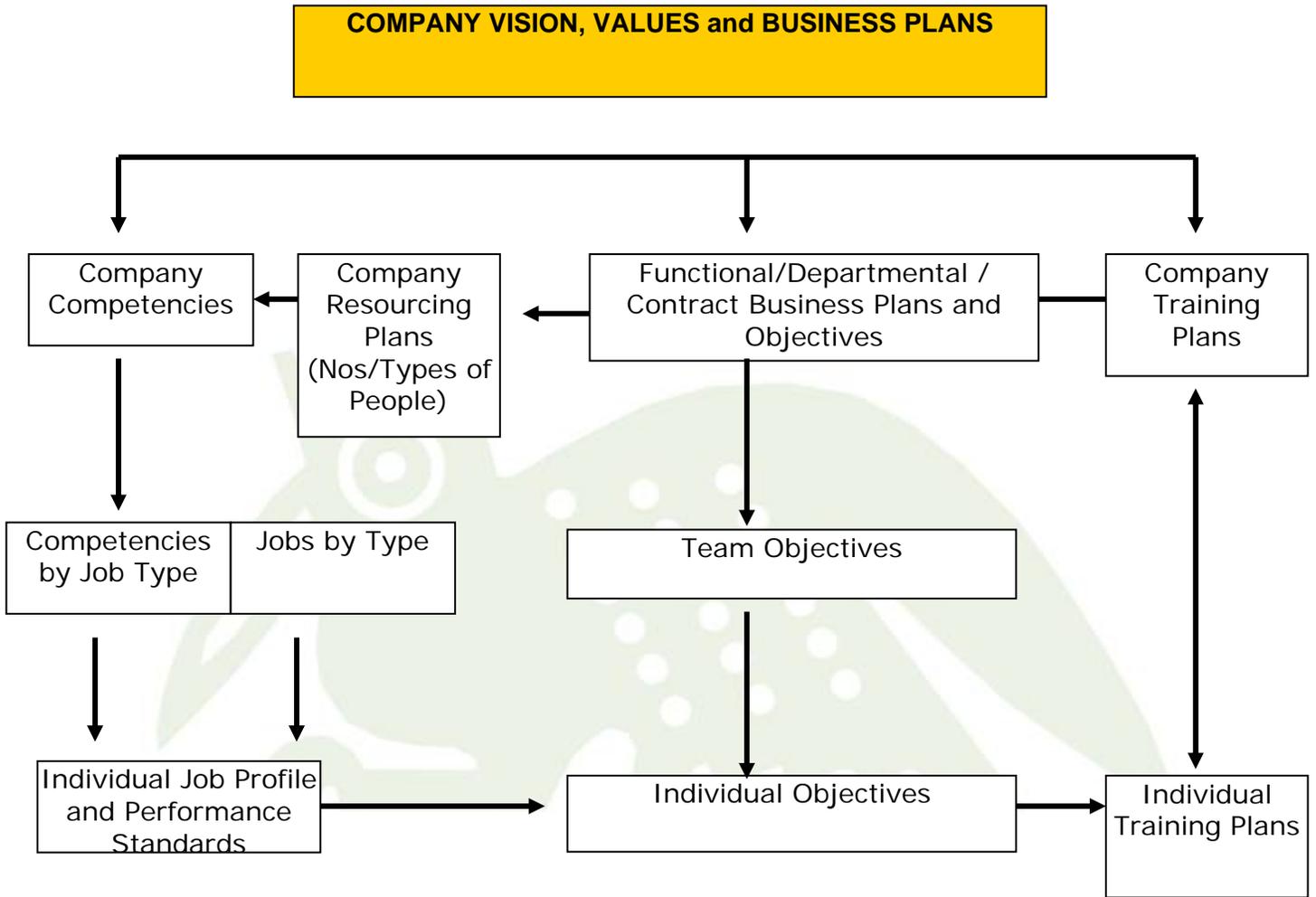
### Guidelines for Managers

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    - We will listen to your ideas and suggestions and take action when necessary.

The Performance Management Process in our company

**WHERE DOES PERFORMANCE MANAGEMENT FIT IN?**



## **WHAT IS PERFORMANCE MANAGEMENT?**

- Management is about achieving results through others.
- Therefore managing the performance of your people is key to your own success
  
- As a Manager you need to:
  - Ensure everyone is clear about what to do and the standards expected
  - Keep yourself informed on how things are going
  - Provide the necessary help and support
  - Seek to improve individual performance at all times.
  - Give regular feedback
  
- Managing the performance of others may be summarised as: -
  - Planning Performance - Deciding what.
  - Tracking Performance - Monitoring how.
  - Improving Performance - Training and Development and Feedback

### **PLANNING PERFORMANCE**

- Identify goals, behaviours, outputs and results required
- Set objectives
- Agree objectives and update them regularly

### **TRACKING PERFORMANCE**

- Stay informed
- Review progress regularly

### **IMPROVE PERFORMANCE**

- Encourage
- Help and support (and direct when inexperienced)
- Give feedback
- Review overall performance
- Tackle poor performance positively

## Why Do We ALL Need Performance Management?

### The Needs of An Employee

- As employees we all have needs
- If you manage people, your people have certain needs from you as their manager
- You have needs from your manager

LOOKING UP 	LOOKING DOWN 
<ol style="list-style-type: none"><li>1. Tell me what is expected of me.</li><li>2. Give me the opportunity to perform.</li><li>3. Tell me how I am getting on.</li><li>4. Give me support and guidance to improve.</li><li>5. Tell me how I have performed overall and recognise my contribution and achievements.</li><li>6. Ask me how I think I can improve and how I think the company can improve</li></ol>	<ol style="list-style-type: none"><li>1. Organising, planning and agreeing objectives, job purpose and objectives.</li><li>2. Delegating and clarifying standards, agreeing measures &amp; review periods.</li><li>3. Regular informal reviews.</li><li>4. Identifying and satisfying training and development needs, coaching, mentoring and support.</li><li>5. Performance appraisal and salary review, career development, motivation and saying thank you.</li><li>6. Listen and act upon good suggestions</li></ol>

## **GUIDELINES FOR MANAGERS**

“This is what is expected of you”

To perform well, we all need challenges, which we feel are important, worthwhile and achievable. Your staff must know what is required of them and they should ideally have been involved in defining the outputs required from them.

As a Manager in our company you have a responsibility to:

- Ensure that each of your staff has a job profile for their job which defines their job purpose and that they understand how this relates to the Company's objectives. (employees need to know how their job relates to the bigger picture)
- Ensure the person also understands the company values, the competencies necessary in their job and the behaviours expected.
- Discuss these with the person to ensure that they understand them and commit to them.
- Define the specific objectives, which the individual needs to achieve this year and document them so that you can assess progress against them.
- These objectives need to include reference to the job profile, relevant terms of reference for projects or specific, numerical targets and also the competencies and performance standards for the type of job.

## **GUIDELINES FOR MANAGERS**

Delegating and Clarifying Standards, Agreeing Measures and Review Periods

“This is how I would like you to perform”

In addition to understanding Job Purpose, specific objectives and the Company Culture and Values, people will need more guidance as to how exactly they are expected to perform.

As a Manager you need to: -

- Delegate work carefully taking into account the experience of each individual. (Some new employees may need close supervision, whilst experienced employees will only require periodic reviews of progress).
- Make sure objectives are SMART: -
  - SPECIFIC
  - MEASURABLE
  - AGREED
  - REALISTIC
  - TIME-BOUND
- Make clear the criteria for measurement for both the numeric targets and the behaviours expected and the review periods.
- Ensure you cover developmental objectives that will help improve performance as well as achieving specific objectives.
- Every person should have a mix of shorter term “maintenance” type objectives, longer term “breakthrough” objectives and personal development objectives. The emphasis between these will vary according to the experience and performance of the person.

## **GUIDELINES FOR MANAGERS**

### **REVIEWING PROGRESS**

"This is how you are doing."

Managers need to monitor how people are doing, and supply regular, objective and timely feedback on performance. This is an ongoing process, not just the annual appraisal

- At progress meetings, review with the individual what has been achieved, and discuss with them what went well and what could have gone better. Explore the reasons for this, and help the individual to draw out the lessons for next time.
- In talking about activity, give some feedback on how you feel the work is going, drawing on other customer responses as appropriate.
- Make the feedback as objective as possible - separate the facts from your assessment of the person's performance
- Be honest - there should be no secrets about performance between a manager and an individual
- Do this regularly - it helps the person to improve their performance without waiting till the end of the year.
- Don't store things up – they lose their meaning and relevance.

## **GUIDELINES FOR MANAGERS**

### **DEVELOPING PERFORMANCE AND IDENTIFYING DEVELOPMENT NEEDS**

“This is what you need to do to improve your performance”

Every one can develop their performance with help from their manager. To help people to achieve improvements in their performance, you as a manager should:

- Look at the specific actions which need to be taken to help the person to improve their performance as part of the formal performance appraisal discussion. Use the evidence of things which could have gone better to help and encourage them to talk about their assessment of what needs to be done.

Define the specific actions which need to be taken by:

- you (as the manager)
- the person
- the company

to improve performance.

- Document these on the Development Plan, so that you can monitor progress against them.
- Include in your operational plans and budgets the actions which you have agreed to take to help this person develop their performance.

## **GUIDELINES FOR MANAGERS**

### **APPRAISING PERFORMANCE**

'This is how we have appraised your performance over the year'

As a Manager you should prepare a formal performance appraisal for each individual to summarise their performance. Formal performance appraisals should be given at regular intervals, at least once a year with an interim appraisal every six months. New employees should have their first performance appraisal after three months with the Company and at least annually thereafter.

Ask the person to prepare a self-appraisal on what they have achieved, using the Self Appraisal Form, what has gone well and what could have gone better. Give them an outline of the areas which you want them to think about.

Prepare a formal performance appraisal for the person covering their performance against their objectives.

You may also want to gather feedback from customers on their perceptions of the person's performance and document this.

Assess their performance against the objectives agreed and the competency performance standards for their band level.

Meet with the person; discuss with them their past performance and draw out their strengths from this evidence, as well as the areas for development. Discuss the facts about what they have done since their last appraisal and your assessment of this.

Ask them about their career plans and aspirations. Be careful about discussions of potential since no manager is ever in a position to promise something firmly when business needs change so much over time.

Document the discussion as part of the formal performance appraisal document. Review this with your manager, as part of the assessment of your performance against your objective - to manage performance effectively and to ensure compliance with the standards.

Ensure that you do what you have committed to do for the person, eg booking training courses and enabling other development activities.

## **GUIDELINES FOR MANAGERS**

### **REWARDING**

"This is your recognition for a job well done."

Rewarding people for performance is an important part of motivating them to do even better.

Managers should:

- Remember that not all rewards need to be monetary; thanks, praise and encouragement are also valued and are important in motivating people to do even better. The opportunity for personal development, such as more responsibility and new experience, is also appropriate recognition for good performance and achievement.

### **Listening**

By listening to our employees and acting on their suggestions when they are of benefit to us all in some way will encourage all employees to contribute their ideas. We can all benefit as a team from these ideas.

Your role as a manager is to encourage your people to come up with the ideas and suggestions and to help us build an environment that encourages this behaviour.

You must develop your listening skills and demonstrate to the employees that you are listening, assessing and implementing those suggestions that you believe are of merit and mutual benefit.



## **The Performance Management Process in our company**

### **Summary**

- You should provide all your people with job profiles, objectives and training and development plans based on business objectives and behavioural standards from the criteria using the attached standard forms.
- These should be reviewed with people formally at least twice a year via a full annual appraisal and an interim appraisal after six months and informally at progress meetings at least once a month.
- Appraisals should be 2-way discussions about past performance and future development.
- Appraisals should be signed by the employee, approved by your manager and sent to HR.
- New jobs and significant changes to jobs which may affect Job Type should be discussed with HR.
- Job Descriptions / Profiles should be used as a basis for recruitment.
- All your people should have agreed training and development plans which cater for current and future development needs. These should be reviewed and updated regularly.
- All your people should be aware of what is expected of them in their current jobs and what they need to do to progress in their careers.
- All your people should be aware of the Company's business plans/contract/department business plans and the Company's values and how they relate to their jobs.