



Some reasons why is it important to manage and evaluate performance:

- Aligning individual efforts to organisational goals.
- Showing recognition to employees for their contributions.
- Better customised training and development of employees.
- Ensuring better planning for succession.
- Achieving fairness in compensation programmes.
- Encouraging accountability and responsibility for outcomes.

Performance Dialogues are often seen as stressful, daunting processes that are nevertheless a vital organisational procedure. The Performance Appraisal, the formal evaluation of an employee's performance, is often considered the most unpleasant part.

Adrian anxiously verbalises to his colleagues: *"I have a performance appraisal meeting with my manager today. It's one of those days in the year when I would rather stay at home."*

Jenny: *"It can't be all that bad, you will still get your 13th cheque even if you have not achieved your objectives."*

Adrian: *"Just the whole experience is a nightmare, it feels that I am being judged and my work scrutinised."*

Are you as a manager making the best use of the opportunity to discuss an individual's performance, and are staff members actively participating and involved in their own performance plans?

It may be time to approach things a little differently.

As the year comes to a close and the financial year-end drawing closer, the big question for most company Executives is: How well has the organisation performed, and how do those results weigh up against its planned objectives?

The performance appraisal is absolutely crucial at this time, both for setting and measuring individual, team and organisational objectives and in some cases the allocation of incentives such as bonuses and salary increases.

Why do appraisals fail to be effective?

- Having vague objectives not aligned to the overall strategy making it difficult to quantify output;
- Shying away from difficult conversations;
- Having a blanket approach to performance management - everyone gets a 3 rating and a 13th cheque although the company has not hit its target;
- Performance appraisals are taken as a necessary formality required by HR and not taken as seriously as it should.
- Managers who think they don't have the time to fit in a performance appraisal discussion therefore take a laissez-faire approach resulting in shoddy appraisals that benefit neither the individual, the manager nor the organisation.

Remember:

What you recognise you see more off

If you are recognising underperformers you will most probably see more underperformers as there will be no reason to perform. The same for high performers, if recognised in the same way as underperformers there is no motivation or incentive to be a high performer.

International best practice has shown that having an ongoing performance dialogue amounts to more than just the once-a-year appraisal; it is an ongoing discussion between the manager and individuals, which covers performance planning, setting clear objectives, as well as managing and supporting the individual, through to the appraisal. A mid-year appraisal is often linked to training and development, ensuring the individual receives all the support needed to achieve the set objectives. Following these methods ensures smooth anxiety-free appraisal process, and achievement of the individual, team and organisational objectives.

Performance dialogue provides a:

- Clear link between the organisation/department and individual objectives.
- It's an ongoing process supported by feedback, coaching and mentoring.
- It's a foundation for learning and development, succession and career planning.
- Its merit is that it has multiple uses and an important tool/component in business effectiveness.
- It's a tracking and measuring tool against the achievement of business objectives.
- Effective management of talent and high performers – differentiating.

- The process is dynamic – projects are added and some removed, but the core output is clearly defined so that an individual can take ownership of achieving their own objectives.
- Recognition of achievements – motivating people to achieve their objectives.

The role of the manager in performance management:

- Provide fair, accurate timely formal and informal feedback.
- Emphasis the employee's strengths during the appraisal and feedback discussions.
- Clarify expectations – with input from the employee.
- Provide support and assist finding solutions to day to day challenges.
- Be a coach - by tapping into the strengths and talents of employees – amplify the good and filter the bad.
- Employee fit – can they do the task; do they have the skills, knowledge and talent.
- Instil a performance culture – Flexibility, communication, innovation and risk taking.
- Actively supporting employees to achieving their objectives.
- Ensure employees have access to knowledge and information they need to do their job well.
- Ascertain if the employee may benefit from appropriate training to do what they were employed to do.

The 3-step approach to managing performance

Step 1 – Planning for performance:

This clarifies and links individual objectives to team and organisational objectives, as well as agreeing and planning for development. Some of the most common traps and mistakes include setting vague objectives, setting objectives that are too difficult or too easy to achieve, or setting too many objectives. Best practice in planning for performance is involving employees in the planning and setting of their objectives; when there is mutual agreement reached on expectations, both management and employees are more committed to achieving the objectives. At this stage the employee should have clear line of sight to the business objectives – and an understanding of the important contribution they make to the business.

Step 2 – Managing and coaching for high performance:

The role of the manager as coach is to support the individual achieve the business objectives by developing knowledge and abilities, creating awareness of behaviour and work patterns, motivating and building commitment.

In the Manager's role as coach and leader, the manager should be:

- Tracking and documenting performance throughout the period.
- Providing formal and informal ongoing follow-up.
- Having discussion on achievements, challenges and expectations.
- Giving timely motivational or corrective feedback.
- Applying the principles of effective coaching for performance.

Try changing vague negative statements into positive affirmations; be more factual, descriptive and effective. For example, instead of "You don't show initiative", you could say "You have so much knowledge and so many ideas, and I would like for you to share them with us at meetings. I value your contribution to this department".

Similarly, instead of "You never meet deadlines", consider rephrasing the statement, "I've noticed that a few of your deadlines were missed. Would you like to talk about it? How can I support you to ensure your deadlines are met in future?"

Address the issue not the person.

Step 3 – The Appraisal

In this step, the evaluation of the individual's contribution is done and based on the outcome of this appraisal, the training and development needs of the individual are identified.

It's important to note that the appraisal should not:

- Be seen as a judgement on the individual.
- Be filled with any surprises.
- Become a platform to air any biases.

Following these simple steps will create a culture of motivation and achievement for both the individual as well as the organisation.

Performance Dialogue is a Management tool to align individual efforts and organisational goals.

Best practice on dealing with quality performance and dealing with areas for improvement.

When Dealing with *Quality* Performance

Tips

- Focus on:
 - ◆ What motivates the achiever.
 - ◆ What has value to him/her.
 - ◆ What changes he/she wishes to see in their job.
- Strive to:
 - ◆ Help him/her in achieving goals.
 - ◆ Provide most significant recognition to them.

When dealing with areas for improvement

- Relate staff member's documented performance to pre-defined objectives/standards.
- Be factual by providing examples.
- Listen, listen and listen.
- Ask for improvement ideas and seek commitment from the employee.
- Agree on actions.
- Be sure to schedule a follow-up meeting to assess progress.

The performance dialogue training

Awakening Excellence has developed a programme to support the achievement of individual, team and business objectives through ongoing dialogue between manager and staff. Applying a coaching style of management.

The best and most effective way to conduct the performance appraisal using a performance dialogue

Performance Dialogues are often seen as stressful, daunting processes that are nevertheless a mandatory organisational procedure. The Performance Appraisal, the formal evaluation of an employee's performance, is often considered the worst part. But, are you as a manager really making the best use of the opportunity, and are staff members actively participating and involved in their own performance plans? It may be time to approach things a little differently.

The Programme

- For the manager, the Performance Dialogue is a platform to initiate and facilitate communication with a direct report. The process calls for the manager to plan, manage, discuss and evaluate the individual's contributions, supporting the individual in improving performance and achieving the agreed objectives.
- The role and responsibilities incumbent on the individual involve an understanding and agreement on what is expected, in terms of deliverables. To what extent is the staff member an *active* participant in the performance dialogue?
- Participants will also find out why the role of Manager as Coach is imperative during the Performance Dialogue process. In applying the principles of effective coaching, managers are able to improve communication, listen more effectively, accurately evaluate and measure performance, and establish an action plan to address areas in need of attention.

Take the dread out of Performance Dialogues, and prevent any unwanted surprises during the Performance Appraisal with this one-day workshop.

Contact Awakening Excellence on info@awakeningexcellence.co.za or telephone: 0113262314