

A Guide to Painless Performance Reviews



Drew Millington

- Co-Founder, Humi
- 10+ years in software leadership positions
- Enjoys Netflixing, spend time with his pug (Hank), and an ice cold diet coke

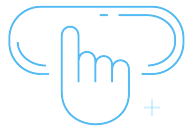


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Everything you need in one place

Your all in one HR, Payroll, and Benefits solution that works straight out the box.



Time Off



Performance



Employee Profiles



Group Benefits



Payroll



Employee Self-Service



eSigning Documents



Applicant Tracking



Reporting



Engagement

TIME FOR REVIEW

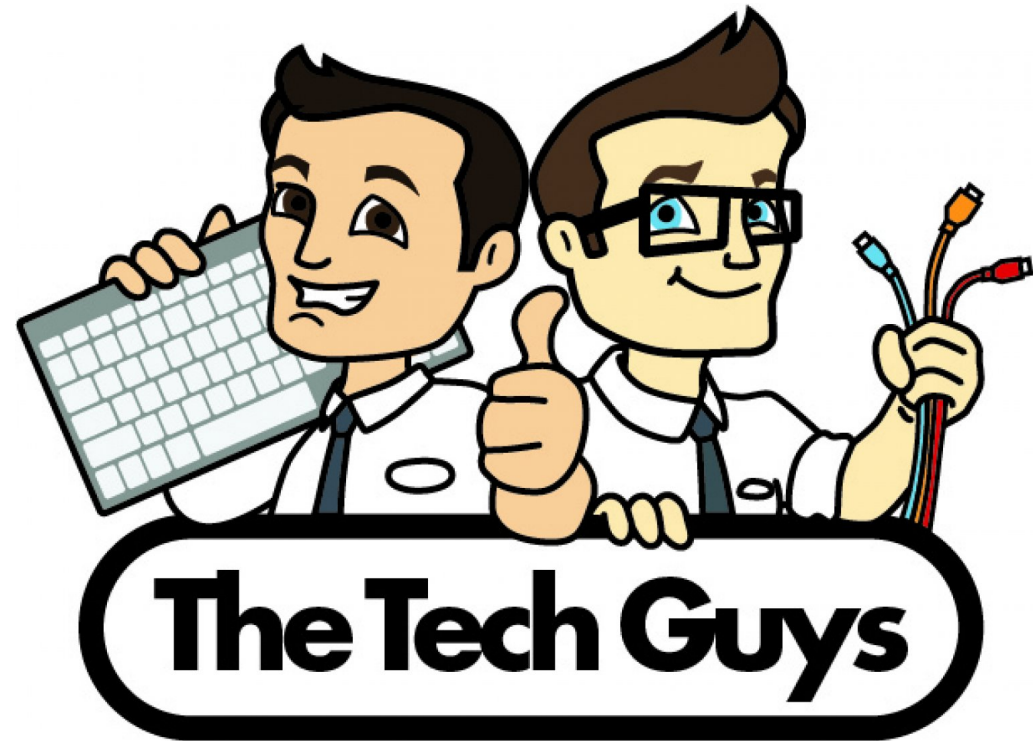


Why is performance
management so hard?

3 Common Reasons:

Problem 1:

We hired developers, sales people, CX folks, but not *managers*.



NEW YORK TIMES BESTSELLER

BE A
KICK-ASS
BOSS

RADICAL
CANDOR

WITHOUT
LOSING
YOUR
HUMANITY

"RADICAL CANDOR
WILL HELP YOU INSPIRE
TEAMS TO DO THE BEST
WORK OF THEIR LIVES."
—SHERYL
SANDBERG

KIM SCOTT

SPECIAL ANNIVERSARY EDITION

HOW TO WIN FRIENDS & INFLUENCE PEOPLE

*The Only Book You Need
to Lead You to Success*

Dale
Carnegie

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YEARS IN
PRINT!

How Successful People Become
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What Got You Here Won't Get You There

Discover
the 20
Workplace Habits
You Need to
Break

MARSHALL GOLDSMITH
"...Marshall's proven improvement process ROCKS!"
—Alan Mulally, CEO, Ford Motor Company
WITH MARK REITER



DON CLIFTON
Father of Strengths Psychology and
Inventor of the Clifton StrengthsFinder

FIRST, BREAK ALL THE RULES

WHAT THE WORLD'S GREATEST
MANAGERS DO DIFFERENTLY

FROM GALLUP

Foreword by Jim Harter, Ph.D.

NOW INCLUDES

Access to the Clifton StrengthsFinder Assessment
and the Q12 Employee Engagement Survey

Problem 2:

The *recency bias* caused by:

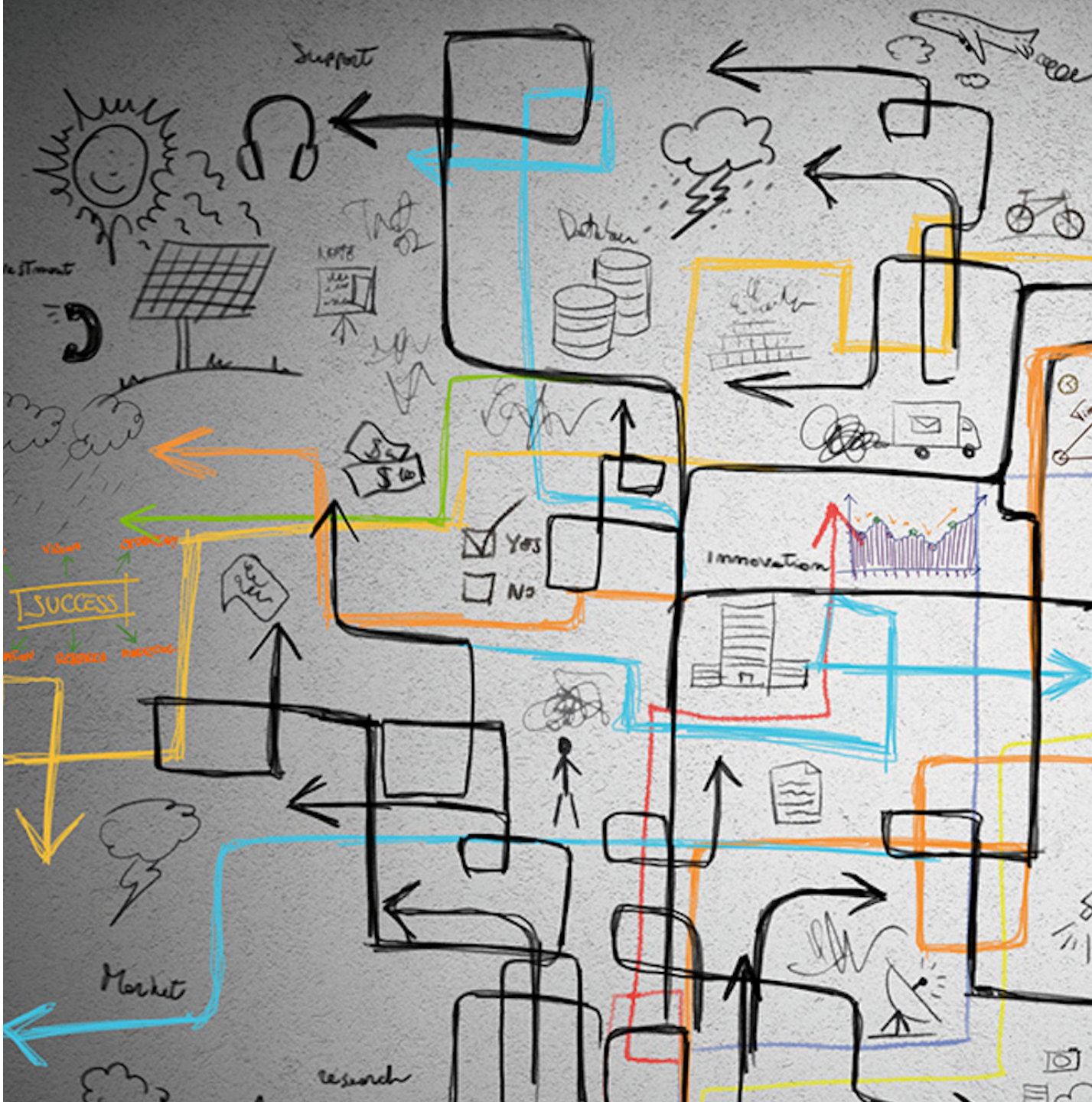
- Not tracking *goals/KPIs*
- *Infrequent reviews* (or other performance touchpoints)



“Your evaluation is based on the next 30 seconds. Go!”

Problem 3:

We overcomplicate it.



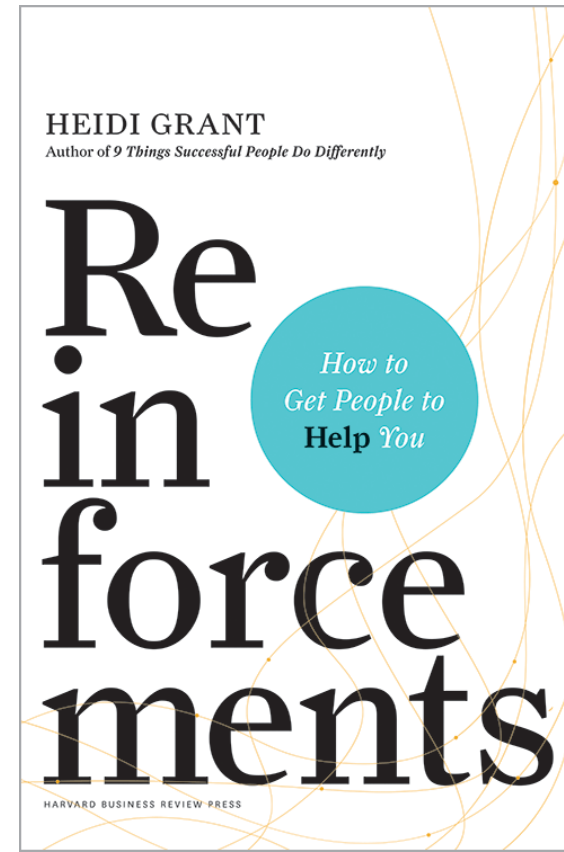
So, how do tech companies create painless performance reviews?

1. Managing is hard. It takes practice and experience, so just START.
2. You need to track goals.
3. Create goals that are about both:
 - *Management/Measurement* (expectations, quota, deliverables); and
 - *Development* (growth in role, building competencies, new projects).
4. Frequency is everything.
5. Keep your reviews simple, and to the point, at least to start.

#Goals

“ A GOAL
WITHOUT
A PLAN
IS JUST
A WISH ”

Alan



It's all about *Next Actions*

(Goals -> Sub Goals)





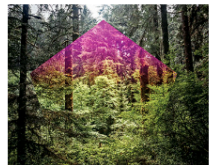
STRATEGIC PLANNING

Get Your Team to Do What It Says It's Going to Do

by [Heidi Grant](#)

FROM THE MAY 2014 ISSUE

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ARTWORK: MARK DORF, // _PATH/UNTITLED 32, 2013, ARCHIVAL PIGMENT PRINT

Say you're in the early stages of planning your department's budget for the next fiscal year. Your management team meets to establish short-term priorities and starts to think about longer-term resource allocation. You identify next steps and decide to reconvene in a week—but when you do, you find that very little progress has been made. What's the holdup? Your to-dos probably look something like this:

WHAT TO READ NEXT



The Feedback Fallacy

VIEW MORE FROM THE

May 2014 Issue



[Explore The Archive](#)

RECOMMENDED



HBR Guide to Project Management Handbook +...

Not: “Launch a Performance Program”

0 – 100% metric

But: “Launch a Performance Program

- Train team on “Next Action” Framework for goals
- Book meeting with Execs->Managers.
 - Enter goals in system of record
- Book meeting with Managers->Direct Reports
 - Enter goals in system of record
- Train team on the new review process
- Assign review template quarterly
- Ensure conversations are happening
- Collect feedback
- Iterate

3 Most Common Types of Reviews:

General
Competencies

Role-Specific
Competencies

Goal-Based

General Competencies

1. Attendance and Punctuality:

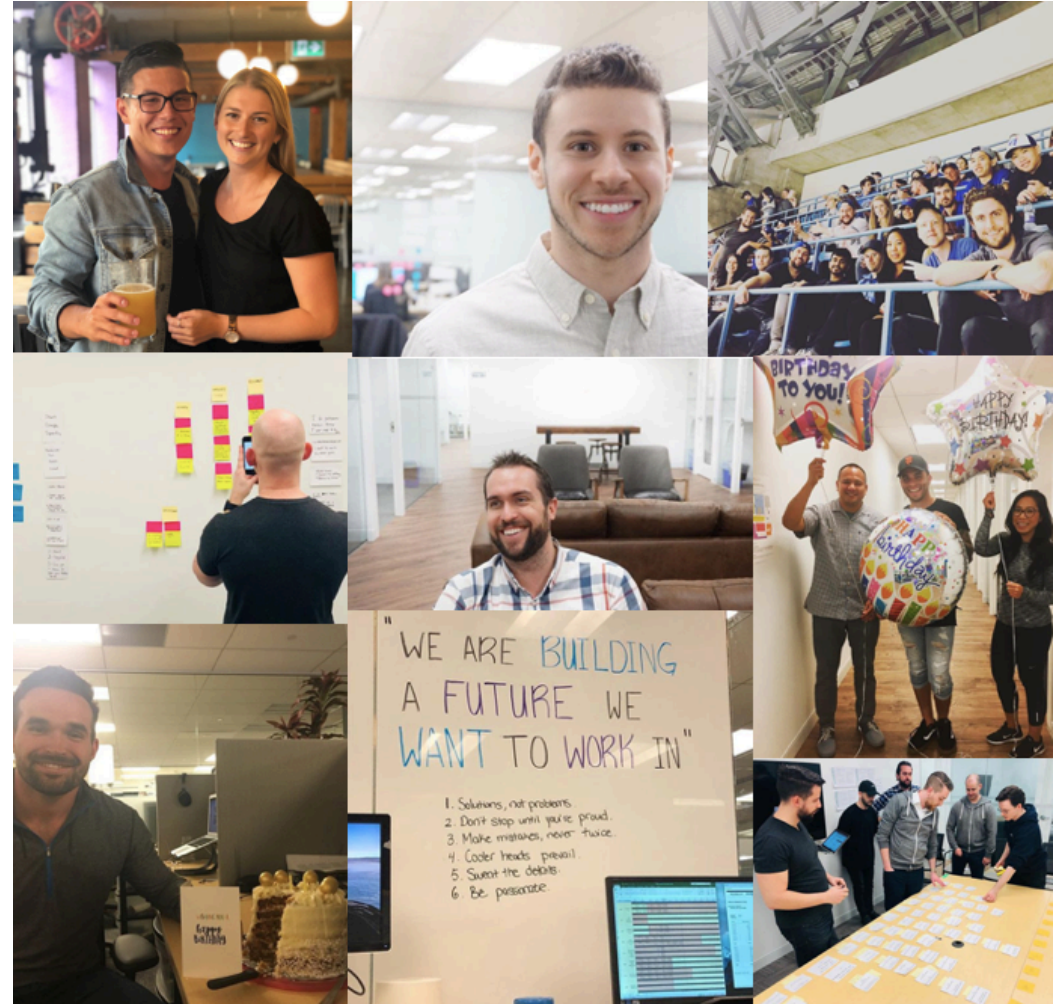
- Schedules time off in advance. Begins working on time. Keeps absences within guidelines.

2. Communication Skills:

- Expresses ideas and thoughts well verbally. Expresses ideas and thoughts well in written form. Exhibits good listening and comprehension.

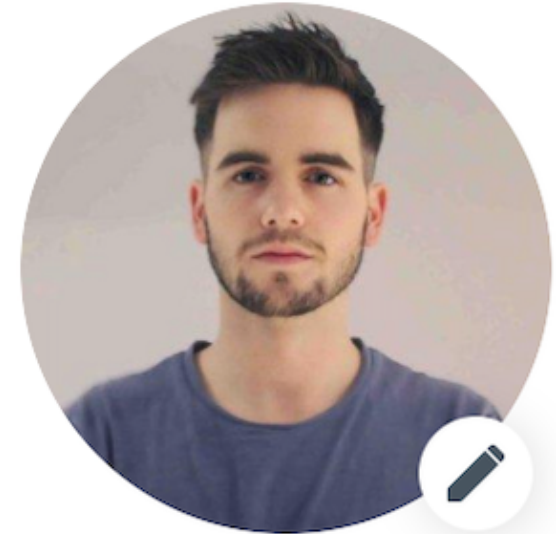
3. Dependability:

- Responds to requests for service and assistance. Follows instructions, responds to management direction. Takes responsibility for own actions



Role-Specific Competencies

1. **Awareness:** Is aware of own individual impact on project delivery
2. **Understanding:** Demonstrates an understanding of project scope through requirements gathering
3. **Understanding:** Understands different estimation techniques
4. **Demonstration:** Is able to estimate at the task and feature level
5. **Experience & Practice:** Has assigned tasks or created sprint/execution plan for small projects and features



Evan Brown

Product Manager

Goal Based

An organization exists for a purpose and that purpose is **performance**.

“Performance” is defined as offering the business, or the external customer, a high-degree of value.

Performance is also about professional and personal growth.

It is not to provide an environment in which each person feels worthy and special. These are worthy methods, but not why we are all here.



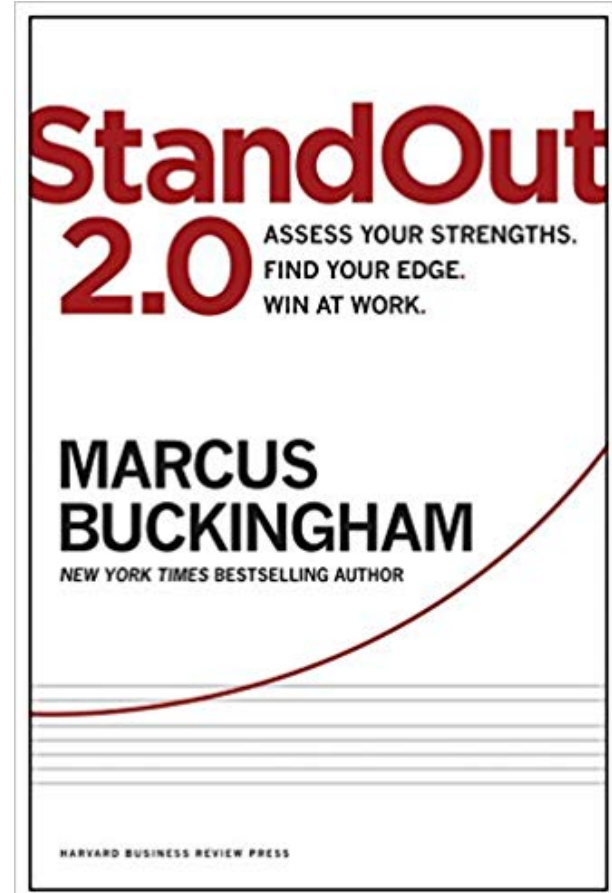
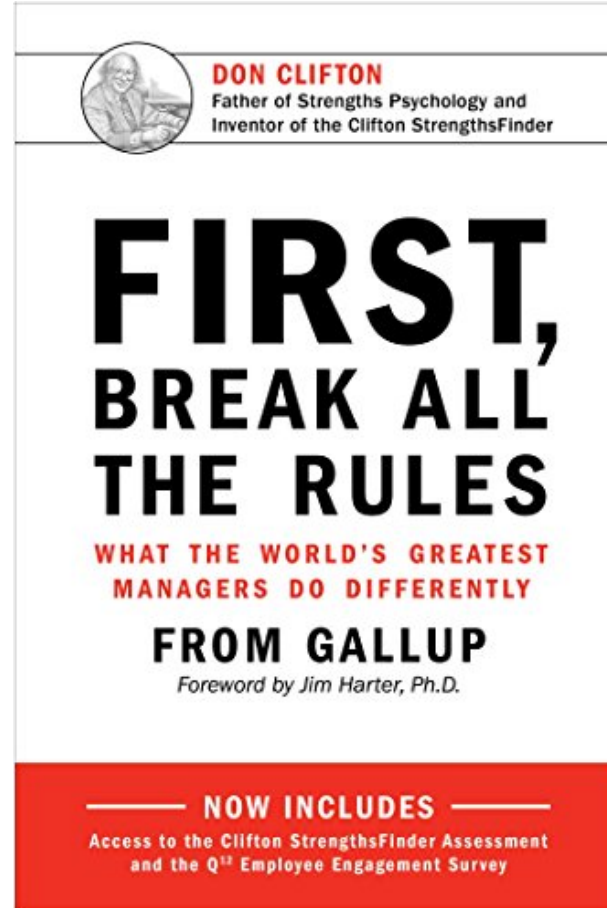
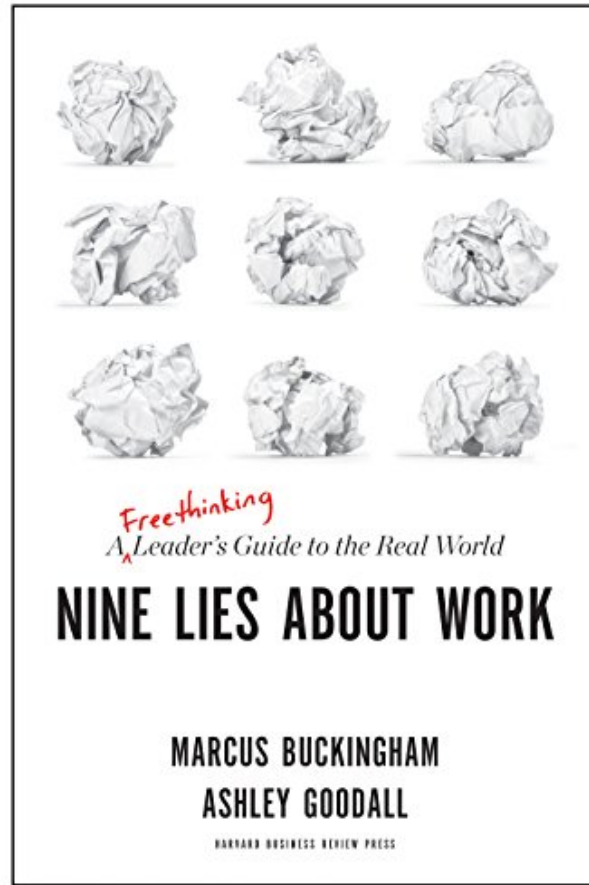
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Template:
“Peak Back, Look Forward”

QUESTION 1

Looking at your goals (left), how would you rate your performance this quarter?

[Delete](#)

- 1) Improvement Required ✘
- 2) Below Expectations ✘
- 3) Meets Expectations ✘
- 4) Exceeds Expectations ✘
- 5) Excellent ✘
- 6) Outstanding ✘



QUESTION 2

Please provide reasoning and examples to support your rating.

[Delete](#)

Respondents will enter their answers in this text box...

< Back

Print



Bruce Wayne

Review Results

70

Goals Completed

4/26

Feedback Received

10

Feedback Given

22

Results: Semi-annual

QUESTION 1

Looking at your goals (left), how would you rate your performance this quarter?



Bruce Wayne

- 1) Improvement Required
- 2) Below Expectations
- 3) Meets Expectations
- 4) Exceeds Expectations
- 5) Excellent
- 6) Outstanding

QUESTION 3

Thinking about expectations in role, how would rate your performance overall?

[Delete](#)

- 1) Improvement Required ✘
- 2) Below Expectations ✘
- 3) Meets Expectations ✘
- 4) Exceeds Expectations ✘
- 5) Excellent ✘
- 6) Outstanding ✘

[+](#)

QUESTION 4

Please provide reasoning and examples to support your rating.

[Delete](#)

Respondents will enter their answers in this text box...

QUESTION 5

What actions did you take last quarter to drive improved performance? Actions, people/mentors, resource, institutional-based etc.

[Delete](#)

Respondents will enter their answers in this text box...

QUESTION 6

What was harder/easier than you thought?

[Delete](#)

Respondents will enter their answers in this text box...

QUESTION 7

On a scale of 1-10, how sure are you that you know what be exactly you should working on to provide the most value to your team, and our company?

[Delete](#)



Low
Negative

High
Positive

QUESTION 8

Please provide reasoning and examples to support your rating.

[Delete](#)

Respondents will enter their answers in this text box...

QUESTION 9

What is your main focus for this upcoming quarter? (Role expectations, or personal development).

[Delete](#)

Respondents will enter their answers in this text box...

QUESTION 10

What will success look like?

[Delete](#)

Respondents will enter their answers in this text box...

QUESTION 11

What actions are you going to take to drive improved performance? Actions, people/mentors, resource, institutional-based etc.

[Delete](#)

Respondents will enter their answers in this text box...

QUESTION 12

What specific outcome(s), as a result of these new actions, are you hoping to achieve?

[Delete](#)

Respondents will enter their answers in this text box...

So, how do companies create painless performance reviews?

1. START (with goals)
 - Measurement goals and development goals
 - All goals need to have next actions / sub-goals
2. Stress FREQUENCY
 - Monthly touchpoints to review progress against goals
 - Quarterly or Semi-Annual Reviews
3. Do the REVIEW
 - Using a goal-based template
4. CREATE (new goals after each review)
 - Ones that push the management and development envelope
 - And that recognize that an organization exists for a purpose and that purpose is performance.



Questions?