



Performance Evaluation Process 2016

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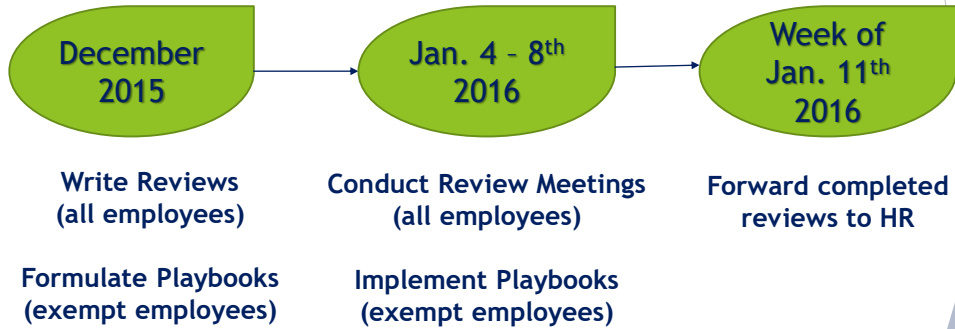
AGENDA

- **2016 Process**
 - Exempt Reviews & Playbooks
 - Non-Exempt Reviews
- **Examples, Examples, Examples**
 - “Painting a picture” that employees can learn from
 - Developing substantive examples
- **Conducting the Discussion**



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2016 Process and Timeline



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Exempt Performance Reviews

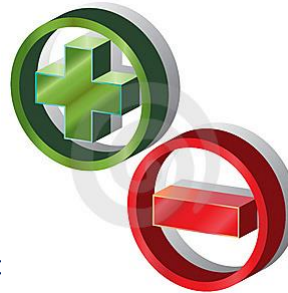
- ❖ **Goals & Accomplishments**
 - ❖ Accomplishments
 - ❖ Shortfalls
- ❖ **Growth & Development**
 - ❖ Areas of Growth During Past Year
 - ❖ Areas of Future Development
- ❖ **2016 Goals**
 - ❖ Department/division goals
 - ❖ Individual goals
- ❖ **Summary Comments**



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Accomplishments and Shortfalls

- ❖ **Ways to express this**
 - ❖ Bullet-point lists
 - ❖ Narrative
- ❖ **Compare to:**
 - ❖ Last year's review
 - ❖ 2015 Playbook
 - ❖ Goals and expectations
 - ❖ Coaching conversations you've had throughout
- ❖ **Include:**
 - ❖ 3-5 significant actions



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Growth, Development, and Goals

- ❖ **Areas of Growth During Past Year**
 - ❖ What skills or experience did they add or enhance over the year?
- ❖ **Areas of Future Development**
 - ❖ In what direction do they need to grow to accomplish their goals?



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Growth, Development, and Goals

❖ 2016 Goals

❖ Department goals

- ❖ Serves as a point of reference and gives the employee “the big picture”

❖ Individual goals

- ❖ Cascade down from department goals
- ❖ Become more detailed in the Playbook



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Sources of Content

- ❖ WAN's
- ❖ Playbooks
- ❖ E-mail files
- ❖ Reports



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Non-Exempt Performance Reviews

Designed for plant and warehouse employees

❖ Performance Results

1. Exhibits required job skills and knowledge
2. Regularly seeks to acquire and apply new skills
3. Uses resources effectively with minimum waste
4. Completes responsibilities in timely and accurate manner
5. Observes all ISO and safety procedures
6. Meets attendance requirements
7. Honors commitments and takes responsibility for actions
8. Accepts coaching and direction from management
9. Solves problems appropriately
10. Offers constructive suggestions and creative ideas for improvement

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Goals of the Review Process

❖ Philosophy

- ❖ If we “paint a picture” of what good performance looks like, employees are more likely to achieve our expectations of good (or better) performance



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Fair, Objective, and Developmental

❖ Fair

- ❖ Presents an accurate picture of the employee's full-year performance
- ❖ Avoid "recency error" - placing undue emphasis on recent performance

❖ Objective

- ❖ Quantify where you can, for accuracy and credibility
- ❖ Don't shy away from thoughtful judgments and perspectives
- ❖ Identifying trends, patterns and "connecting the dots" for employees helps put your advice and coaching in perspective

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Fair, Objective, and Developmental

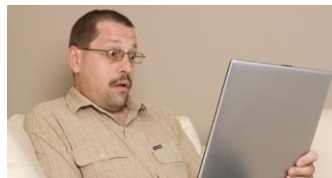
❖ Developmental

- ❖ It's all about coaching and developing



❖ Goal: No Surprises

- ❖ If the employee is surprised by the review, we need to do a better job of communicating with them going forward



“Accomplishment” Example

❖ Example

• Your execution in transitioning the ABC project to Taylor so that you could carry out the XYZ project was flawless. I speak to the ABC clients frequently, and they’ve each noted that Taylor is well-trained on their needs - but that they feel they can call on you to handle higher-level issues when required. Thank you for being thorough and methodical in converting these accounts and making them feel well cared-for.

COMMENTS: Provides specific feedback from multiple sources. Ties back to broader goals (customer care). Lets employee know exactly what they did right, what was valued, and why.

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“Short-Fall” Example

❖ Example

• Roy is sometimes found to be sarcastic or impatient with those not picking up information right away

❖ Add:

• The team respects Roy’s knowledge - but sarcasm can diminish this respect. I need for Roy to demonstrate leadership by serving as a teacher and mentor of his department colleagues.

COMMENTS: The additional information helps the employee know how to address the deficiency and move beyond it

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“Past Growth” Example

❖ Example

- During the past year, you have become much better at recognizing potential issues with the XYZ process and taking preventative action. A good example is the ABC issue in September.

❖ Add:

- On ABC, you came to me with a concern and a plan for addressing it. We were able to put a plan in place that limited down time to a few hours, rather than a few days, which was a great benefit to the entire plant. Excellent job on this. Keep coming to me with similar concerns and solutions.

COMMENTS: Provides specifics. Lets employee know exactly what they did right, with whom, and what the results were. It also stakes out an action plan for repeating the success in the future.

“Future Growth” Example

❖ Example

- Would like to see Carol take more initiative and demonstrate more urgency

COMMENTS: Carol might not see clearly when she's lacking in initiative. The example shows her behavior not to repeat, and gives her a path forward.

❖ Add:

- For example, when the ABC project was completed, Carol had an idea to contact other similar clients to pitch them on a similar project, but didn't carry through with the idea. Going forward, I'm asking Carol to have more confidence in her ideas and work together with me to put plans in place to carry out her ideas.

Summary Comments

❖ **Tying it all together**

- ❖ A chance to bring it all together in one impactful message

❖ **Example**

❖ “During 2015, Ryan was promoted to supervisor and did an excellent job of establishing himself as a respected leader of his former teammates. He embraced the supervisory training he received, and steadily increased his skills in delegating tasks, establishing goals, and coaching team members.”

❖ “For 2016, I’m asking Ryan to keep developing his management skills through study, practice, and getting mentoring advice from senior colleagues. In addition to his day-to-day duties, I expect Ryan to be a significant contributor to the success of our ABC initiative in the plant, which is one of our major plant-wide goals.”

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Conducting the Discussion

❖ **Logistics**

- ❖ Set the meeting date/time in advance
- ❖ Meet in quiet, private space
- ❖ Turn off phones; don’t answer emails/texts
- ❖ Conveys seriousness, thoughtfulness, and respect



❖ **Two approaches**

1. Share the review with the employee in advance - then meet to discuss
2. Discuss verbally - then share written copy at end of meeting

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Conducting the Discussion

❖ Negative Reactions

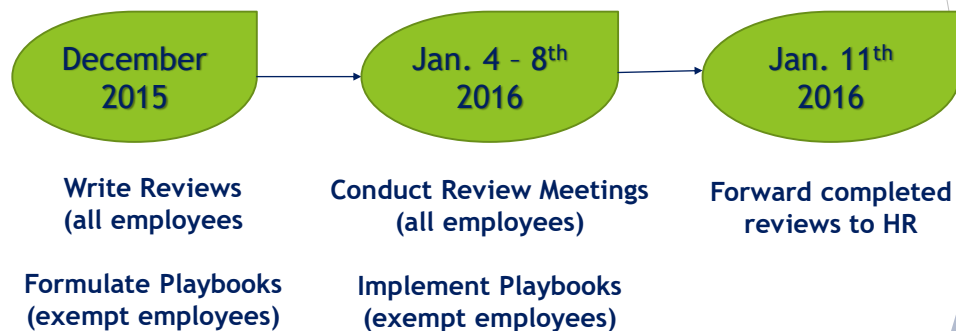
- ❖ The discussion should be a two-way dialogue - allow and encourage the employee to share their views
- ❖ Understand and note contrary views - but don't get drawn into a long debate
- ❖ Employee can share their views in writing, which becomes part of the review record

❖ Final Thoughts

- ❖ Goal of this process is to align performance, goals, roles, and development

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2016 Process and Timeline Re-cap



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“Thanks for joining us today”

***Please contact me with further
questions at any time***

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