


Managing Performance
What Every Supervisor Needs to Know from HR
© 2008 Willdan Management Services – All Rights Reserved


Welcome
Southern California Chapter
CUPA-HR



Welcome

- Thank you for investing your time to learn.
 - Ask questions.
 - Participate in the case studies.
 - Interact with the course leader and your colleagues.
 - Leave with tools to be a more effective supervisor, manager, workplace leader.


www.willdan.com




Mike Deblieux, SPHR

- Vice President Willdan Management Services
 - Speaker
 - Basic people management skills
 - Author
 - Seven people management books
 - The Deblieux Report
 - HR Concepts
 - Consultant
 - On-site workplace coaching for workplace leaders
 - Management systems and practices
 - Awards
 - HR Excellence
 - Blue Ribbon Speaker
 - Distinguished Instructor


www.willdan.com



Howdy Neighbor




www.willdan.com

WILLDAN | 

What is Your Greatest Challenge as a Supervisor?

- I spend too much time preparing the performance evaluations for my staff. I'd love to see a new system that makes it less stressful.
- Being able to cover all areas that need improvement with staff during coaching sessions so that performance evaluations are smoother.
- Building my team activities among my unit.
- Giving constructive criticism.
- How to correct/improve performance of long term poor performers.
- Legal issues for managers.
- Delegating.
- Performance evaluations, balancing positive constructive criticism and negotiating agreeable rating scores.
- I need to learn to delegate tasks rather than taking them on myself.


www.willdan.com

WILLDAN | 

Work Together

- You are Mardy.
- Group One
 - What do you want from HR?
- Group Two
 - What do you not want from HR?

www.willdan.com

WILLDAN |  1

Giving HR Advice

Communicate in the language of your audience.

www.wildan.com

WILLDAN 2

Giving HR Advice

Advice

www.wildan.com

WILLDAN 2

The Basics of Employment

- Fundamental to HR
- Not fully understood or appreciated by first-line workplace leaders

www.wildan.com

WILLDAN 3

The Employment Relationship

Employment

Employer provides a **job** and **compensation.**

Employee does the **work** and complies with **policies.**

www.willdan.com

WILLDAN |

3

Direction and Responsibility

- Has **management** managed this employee **properly**?

www.willdan.com

WILLDAN |

3

Job-related

- (Working definition) *Base employment decisions on information that reasonably predicts success on the job and interact with people in all work related situations in a way that helps them to be successful on the job.*

www.willdan.com


WILLDAN |

3

Absolutes

- No choice
- Must be done according to the employer's policy
- HR's role...
 - Training
 - Reinforcement
- Work Together
 - Make a list of three absolutes in your organization.

www.willdan.com


WILLDAN 

3

Coaching vs. Counseling




- Counsel means to offer **advice** and **recommendations**.
- Coach means to:
 - Set standards and define **expectations**,
 - **Train**,
 - Evaluate and provide **direction**,
 - Hold members of a team **accountable**.

www.willdan.com


WILLDAN 

4

Work Together

- *It would be really helpful if you would try to get along with your coworkers.* 
- *Our sexual harassment policy prohibits unwanted or unwelcome touching. When you walked into the meeting this morning, you stood behind Alfonso's chair. You put your hands on his shoulders and began to massage his back. He turned and asked you to stop. You continued anyway. I expect you to refrain from touching other employees without their consent.* 
- *The regulatory agency requires an entry in each section of Form FDA-11. You must complete each section and verify that the information you enter is both accurate and complete in accordance with our operating procedure.* 

www.willdan.com


WILLDAN 

4

Setting Expectations

- An expectation tells an employee what to do and how to do it.

www.willdan.com

WILLDAN | 

5


Basis of an Expectation

Rule

or


Performance Standard

www.willdan.com


WILLDAN | 

5

Types of Expectations


 **Task**

- Steps to be taken
- Procedure to be followed

 **Result**

- The completed job

www.willdan.com


WILLDAN | 

5

Involvement

- The key to employee success is **collaboration**.


www.willdan.com

 5

Measurement

- Deadline
- Quality as defined by objective measures
- Quantity
- Customer satisfaction
- Supervisor's judgment
- Other


www.willdan.com

 5

Work Together

- Parent
- Nine year old child
- Bedroom is a disaster zone


www.willdan.com

 6

Trust

- Precious commodity
- New relationships start with it
- May be lost slowly or quickly


www.willdan.com

WILLDAN |  7

Three Levels of Trust

- High trust results in **spontaneous** behavior
- Reduced trust results in **cautious** behavior
- Lost trust results in **aggressive** behavior


www.willdan.com

WILLDAN |  7

Supervisor Behaviors

- A change in the **tone** of **voice**.
- **Rejecting** ideas or requiring a **report** before making a routine decision.
- **Keeping** assignments or giving them to someone else.
- **Avoiding** the employee.


www.willdan.com

WILLDAN |  7

Regaining Trust

1. Meet to talk about the **working** relationship.
 - Effective **working** relationship.
 - Clarify your role as a supervisor.
 - Improve employee performance.
2. Work together to identify the **cause** and **symptoms** of the problem.
3. Work together to decide on how to **prevent** the problem in the future.

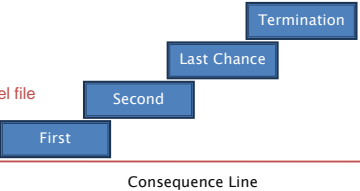
www.willdan.com

WILLDAN  8-9

Corrective Action

Formal

1. Talk to the EE
2. Write a Memo
3. Memo to Personnel file




www.willdan.com

Informal

1. Talk to the EE
2. Make a Note


Coaching **Training**

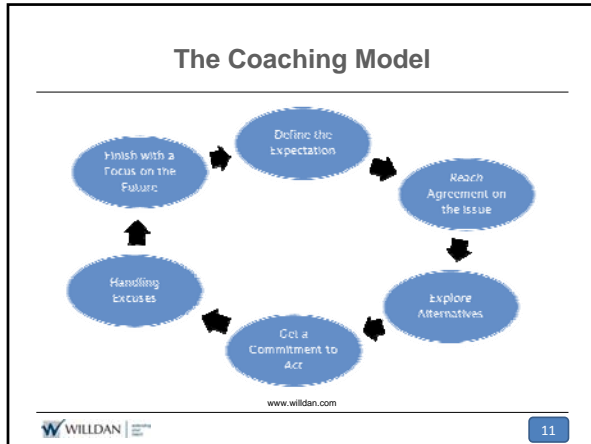
WILLDAN  10

Coaching

- **What is a Coaching Meeting?**
 - A coaching meeting is a **planned two-way discussion** that is held at the **early** signs of a performance issue. It is designed to **redirect** an employee's behavior toward **compliance** with a **policy** or meeting a **performance standard** while maintaining a relationship of **trust** between the employee and the supervisor.

www.willdan.com

WILLDAN  11



The Six Steps

1. Define the Expectation

- An important part of your job is to meet or exceed the needs of our customers, from their perspective, within our corporate guidelines. Do you understand that this is an important part of your job?

www.willdan.com

WILLDAN | 12

The Six Steps

2. Reach Agreement on the Issue

- How would you evaluate your performance on the Ripken order in relation to this performance standard?
- If the employee does not acknowledge the issue:
 - Can I share with you how I evaluated your performance on the Ripken order in relation to this standard?

www.willdan.com


WILLDAN | 12

The Six Steps

3. Explore Alternatives

- Let's make a list of the steps you can take to meet the expectations of our customers, from their perspective, within our corporate guidelines. What is one thing that you think you could do differently with a customer like Mr. Ripken? (Discussion)
- Continue to add to the list
- Supervisor adds ideas after the employee
- Ideas that are not acceptable are not added to the list

www.willdan.com


 12

The Six Steps

4. Get a Commitment to Act

- I think we have a good list. Let's go back through it. I need you to commit to taking the steps that will allow you to meet the needs of our customers, from their perspective, within our corporate guidelines.

www.willdan.com


 12

The Six Steps

5. Handling Excuses

- You are right. Some customers are hard to get along with. They make it harder for you to do your job. But that will always be the case. I don't think that either of us can change that. Our goal in this meeting is for you to be able to meet their needs, from their perspective, within our corporate guidelines. What do you think that you can do when you encounter a difficult customer?

www.willdan.com


 12

The Six Steps

6. Finish With a Focus on the Future

- Thank you. I think this has been a productive discussion. Let's finish by having you summarize the steps you are going to take to meet the needs of our customers, from their perspective, within our corporate guidelines.
- **The HR Question**
 - Thank you. One more thing. Is there anything that you need from me or the company to perform your job in this way?


www.willdan.com

WILLDAN |  12

Documentation

1. Demonstrate that the supervisor has worked to **create** an opportunity for the employee to be successful through appropriate training and coaching.
2. Demonstrate that the employee has **violated** a rule or not met a performance standard.
3. Explain what the employee **must** do to comply with the rule or meet the performance standard.


www.willdan.com

WILLDAN |  13

E-FOSA+

- **Expectation**
 - The rule or the performance expectation.


www.willdan.com

WILLDAN |  13

E-FOSA+

- **Facts**
 - What the employee did to violate the rule or not meet the performance standard.
 - What the supervisor did to create an opportunity for the employee to be successful.


www.willdan.com

WILLDAN |  13

Facts

Behavior	X	Fact/Conclusion
Good Job	<input type="checkbox"/>	Fact
	<input checked="" type="checkbox"/>	Conclusion
Congratulated	<input type="checkbox"/>	Fact
	<input checked="" type="checkbox"/>	Conclusion
Volunteered	<input type="checkbox"/>	Fact
	<input checked="" type="checkbox"/>	Conclusion


www.willdan.com

WILLDAN |  13

E-FOSA+

- **Objectives**
 - What the employee must do to correct the problem.
 - Specific
 - Positive
 - Requirement
 - Complete
 - Correct: *"You must complete sales proposals and give them to me at least two days before we meet with a client. Your proposals must follow the outline on page 57 of the sales manual. Any math, quantity discounts or payment terms must be checked and accurate. If you have any questions when you are developing the proposal, I expect you to come to me or, if I am not available to ask Hue Nguyen for help."*


www.willdan.com

WILLDAN |  13

E-FOSA+

- **Suggestions**
 - Ideas that the supervisor can offer to help the employee meet the objectives (may also come from the employee). An employee is not required to do a suggestion.
 - Example: *The company-training department is offering a course in how to use the graphical presentation program we have on our computers. Understanding the program will make it easier for you to develop sales materials. If you would like to take the course, please see Lee for information on how to sign up. I will approve a registration request if you give it to me.*


www.willdan.com

 13

E-FOSA+

- **Actions**
 - The consequences of not complying with the rule or meeting the performance standard in the future.
 - *Up to and including termination.*


www.willdan.com

 13

E-FOSA+

- **Plus**
 - Whether the supervisor is making a valid attempt to create an opportunity for success

www.willdan.com

 13

When Performance Meets Expectations

- Most people do what they are supposed to do
- Often feel taken for granted

Common Mistakes

1. Take the proper performance for **granted**.
2. Wait for **"perfect"** to say anything.
3. Provide **general** feedback that leaves the employee guessing about what he or she did correctly.
4. Fail to reinforce the value of **continuing** the performance in the future.


Five Questions

1. What is the **rule** or performance **standard**?
2. What is the employee doing **right**?
3. What is the **value** of the employee doing the job correctly?
4. How can the supervisor show **sincere** appreciation?
5. What is the employee **expected** to do in the future?

Gail's Questions

1. How do you feel about the way that I **interact** with you?
2. Would you like to see me **more** often or **less** often?
3. What do I do that **helps** you?
4. What do I do that **gets in your way**?


www.willdan.com

WILLDAN |  15

Thank You

- Program Slides
 - Leave a card with Mike.

www.willdan.com

WILLDAN |  16
