

**LOEB LEADERSHIP DEVELOPMENT GROUP**  
A Division of Loeb Consulting Group, LLC

**Welcome!**  
**Be a Better Boss:**  
**The Write Way to Track Performance**

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**Tracking Performance**

**Welcome!** *As we wait to get started, use the question box on the control panel to tell us your response to the following question – You can choose more than one.*

*What statement(s) best describe your method of tracking individual performance...*

- A. I make notes throughout the year in preparation for annual review
- B. I give feedback during regularly scheduled check-in meetings
- C. My feedback is informal and on the fly
- D. I give feedback during the review and reflect on their performance when preparing for it
- E. I securely document conversations I have had about throughout the year

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866-987-4111  
info@loebconsultinggroup.com  
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**LOEB LEADERSHIP DEVELOPMENT GROUP**  
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**Introduction and Welcome!**



**Natalie Loeb**  
Natalie@lobleadership.com



**Gordon Loeb**  
Gordon@lobleadership.com



**Teri Coyne**  
Teri@lobleadership.com

[www.lobleadership.com](http://www.lobleadership.com)

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**Proud Woman Owned Business**



**Certified WBENC**  
Women's Business Enterprise

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*"There's no way to get better at something you only hear about once a year."*  
— Daniel Pink

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### Benefits

- ✓ Improves productivity and organizational results
- ✓ Develops and grows team member (expands their capacity to take on more assignments and different roles within your group or the organization)
- ✓ Addresses performance issues as they come up not when they become a liability
- ✓ Creates a culture of "valued development"
- ✓ Provides management with accurate assessment of skills and abilities
- ✓ Builds mutual respect and trust



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### Employee Perspective

**Would you prefer praise/recognition or corrective feedback?**

|                     |     |
|---------------------|-----|
| Corrective Feedback | 57% |
| Praise/Recognition  | 43% |

**How would corrective feedback from your manager affect your overall performance?**

|             |     |
|-------------|-----|
| Improve     | 72% |
| Not Improve | 28% |

© 2014 Study by Leadership Consultancy Zenger/Folkman of 900 Professionals.  
Your Employees Want the Negative Feedback You Hate to Give



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### Performance Management...

*A **process** that provides **feedback**, **accountability**, and **documentation** for performance outcomes. It helps employees to channel their talents toward organizational goals.*



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## Shift Your Mindset

*Shift from a mindset of performance management to a mindset of performance development.*

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## Performance Development...

*A process that provides feedback, accountability, and documentation for performance outcomes. It helps employees to channel their talents toward organizational goals and develop and enhance their skills to respond to changing needs.*

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## New Rules

For performance management, old rules vs. new rules

| Old rules  | New rules   |
|--|---|
| Performance appraisals and goal setting conducted once per year                        | Checks conducted quarterly or more frequently; regular goal setting occurs in an open, collaborative process          |
| Feedback indirect by manager at end of year  | Feedback collected via 360-degree and widely shared at end of year (often through open and multiple tools)            |
| Goals kept confidential with focus on individual achievement                           | Goals made public and transparent with increased focus on team achievement  |
| Employees evaluated by their manager   | Managers also evaluated by their employees  |
| Employees have ranked on a quantitative scale  | Employees rated on a qualitative scale; rankings considered, not forced   |
| Compensation kept confidential and focused on specific, rank-based performance ratings | Compensation levels made transparent, more frequently changed, and focused more on pay for performance than on equity |
| Managers focused on evaluating performance   | Managers focus on coaching and developing people  |
| One leader evaluates each individual in a qualitative, top-down process                | Many contribute to an individual's performance evaluation; evaluation of peers heavily on data                        |
| Process considered to be a burden and waste of time                                    | Process thought, tested, continuous, and lighter  |

*The dreaded "annual review"*

*How can we do better?*

Source: Deloitte University Press | [dupress.deloitte.com](http://dupress.deloitte.com)

\* 2017 Deloitte Human Capital Trends Survey of more than 10,400 business and HR leaders across 140 countries.

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## Tracking Performance

Clear Expectations/Accountability + Monitored Performance = Effective Performance Feedback

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## Four C's of Setting Clear Expectations

**Clarity**

- It starts with you. Consider factors for success, context and Who, What, Where, When, Why and How?
- Articulate clearly to team members

**Communication**

- Find communication style and method that is mutually productive
- Use tools to monitor progress
- Engage and check-in as often as necessary

**Consistency**

- Consistent application of setting expectations establishes a Managerial "habit" which becomes part of your daily routine.

**Commitment**

- Seek agreement and commitment on plan of action
- Use tool to monitor progress and adjust as needed
- Reaffirm commitment as needs evolve/change

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## Accountability in Action

Doing the Job → Accountability in Action → Achieving the Result

Managing Accountability means you are setting the expectation that the job is not done until the result is achieved.

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### 5 Ways to Track Performance

- Watch People Work
- Check their Work-in-Progress
- Get Feedback from Others
- Provide Self-Monitoring Tools
- Get Feedback from Employee

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### Watch People Work

| Observe:   | Consider:   |
|--|---|
| <ul style="list-style-type: none"><li>→ Interactions with colleagues/teammates</li><li>→ Meeting/Project participation</li><li>→ Habits/work behaviors</li><li>→ Your Own Experience</li></ul> | <ul style="list-style-type: none"><li>• Departmental Values/Mission</li><li>• Job Description</li><li>• Firm Values/Mission</li><li>• Results</li></ul> |

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### Check their Work-in-Progress

| Engage:  | Consider:  |
|--|--|
| <ul style="list-style-type: none"><li>→ Setup check-in meetings</li><li>→ Review projects and status</li><li>→ Assess progress, goals and results</li><li>→ Observe behaviors, commitment, communication</li></ul> | <ul style="list-style-type: none"><li>• Expectations</li><li>• Accountability /Results</li><li>• Timeframes</li><li>• Competencies</li></ul> |

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**Get Feedback from Others**

|   |  |
|---|--|
| <p><b>Ask:</b></p> <ul style="list-style-type: none"> <li>→ Colleagues, stakeholders, peers, management, Team Members</li> <li>→ Focus on strengths and areas for development (What are they doing well? How can they do better?)</li> <li>→ For examples!</li> </ul> | <p><b>Consider:</b></p> <ul style="list-style-type: none"> <li>• Role/Relationship</li> <li>• Communication Style (DISC!)</li> <li>• Themes</li> <li>• Organizational Goals</li> </ul> |
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**Provide Self-Monitoring Tools**

|  |   |
|--|---|
| <p><b>Co-Create:</b></p> <ul style="list-style-type: none"> <li>→ Development Plan for competencies</li> <li>→ SMART Goals</li> <li>→ Project Plan(s) or Workload Checklist</li> </ul> | <p><b>Consider:</b></p> <ul style="list-style-type: none"> <li>• Ease of Use</li> <li>• What gives employee/you best visibility into performance?</li> <li>• What is available through Performance Management or Project Management tools at firm?</li> </ul> |
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**Get Feedback from Employee**

|  |   |
|--|---|
| <p><b>Promote Self-Review:</b></p> <ul style="list-style-type: none"> <li>→ Quarterly Self-Review</li> <li>→ How do YOU think it is going?</li> <li>→ What are you doing well? How can you be more impactful/effective?</li> </ul> | <p><b>Consider:</b></p> <ul style="list-style-type: none"> <li>• Ease of use</li> <li>• Communication/Behavioral Style</li> <li>• Culture and Values of Organization</li> </ul> |
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## Performance Feedback

**Should be:**

- ✓ Accurate
- ✓ Objective
- ✓ Balanced

**Think SBI :**

**S**ituation  
**B**ehavior  
**I**mpact

*Looking forward, What would you do differently?*

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## Feedback Sandwich

**Positive**

**Situation, Behavior, Impact**

**Forward focused and positive**

Open the discussion with a positive aspect of the employee's performance.

- ✓ Identify the problem, explain your concern
- ✓ Ask the employee to explain his/her perspective
- ✓ Use examples to outline how the problem affects the organization's goals, the department, etc.
- ✓ Ask the employee for solutions; develop an action plan together

End on an upbeat note, expressing confidence in the employee's ability to pursue a positive course.

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## Positive Feedback

*At the new client meeting on Monday afternoon with the Customer Success team, you ensured that the meeting started on time and that everyone had the materials in advance. Your introductions were creative, finding things people had in common and addressing the concerns up front and honestly. You were friendly, knowledgeable and handled all the questions with candor and expertise.*

*As you know, this client took a long time to convert and they did not always have the best sales experience. Your preparation and attention to their needs set the right tone for our relationship moving forward. Thank you.*

*How did you feel about it? Is there anything you would do differently next time?*

- ➡ **Situation**
- ➡ **Behavior**
- ➡ **Impact**
- ➡ **Moving Forward**

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## Constructive Feedback

*During yesterday morning's team meeting, when you gave your quarterly update to the Senior Management Team, you were uncertain about two of the slides and commented to the team that "now that you had a chance to see the numbers projected they were not correct."*

➡ **Situation**

➡ **Behavior**

➡ **Impact**

➡ **Moving Forward**

*Accurate metrics help drive the decision making of that team and our business, and are a reflection of the quality of work we all do together. When you present information that is not accurate it affects the team's trust in our ability to deliver and it impacts our effectiveness.*

*Understanding this now, what would you do differently next time?*

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*"Documentation offers a history of the employee's improvement or failure to improve performance over time. It is chronological and a precise description of the employee's actions, the manager's actions, and events as they occur."*

[How to Document Employee Performance](#)  
Susan M. Heathfield  
The Balance, August 28, 2017

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## Documenting Performance

**TIPS:**

- Document right after conversation/discussion
- Just the facts – avoid opinions, bias, judgment (*who, what, where, when...*)
- Individuals present – date and time of discussion
- What topics were discussed and what was agreed upon?
- Summarize
- Consider potential audience for documentation
- Include or reference any documentation/written feedback/samples, etc.

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## Documentation Example

September 20, 2017 1:30pm

During our weekly status meeting this morning at 10:00am (EST) I spoke with Alex about his lack of preparation for the Quarterly Leadership Team meeting yesterday (Tuesday, 9/19)

Here's what I said (taken from notes I made in preparation):

*"During yesterday morning's team meeting, when you gave your quarterly update to the Senior Management Team, you were uncertain about two of the slides and commented to the team that "now that you had a chance to see the numbers projected they were not correct." Accurate metrics help drive the decision making of that team and our business, and are a reflection of the quality of work we all do together. When you present information that is not accurate it affects the team's trust in our ability to deliver and it impacts our effectiveness."*

Alex acknowledged his lack of preparation and said he understood the impact and had wanted to speak to me about it as well. He said he had assumed he had the updated numbers but did not double check before the meeting as he was running behind. We discussed the need to make time to prepare for these meetings as the metrics he compiles are a critical component to our decision making.

He said he understood and moving forward he would block out the hour before the meetings to double check the numbers and be prepared.




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## Tools

**Tools to use:**

- ✓ Use Performance Management System to make notes throughout the year
- ✓ Self-monitoring tools (project plans, goal worksheets, action registers, etc.)
- ✓ Emails or other examples of feedback
- ✓ Security is key!



**Use Performance Management System to make performance notes!**




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## Putting it all Together

**Choose all the statements that reflect what you want to commit to regarding Tracking Performance:**

- A. Commit to using a tool to document and track performance that integrates easily into my daily workflow.
- B. Seek feedback on performance from colleagues/work partners
- C. Use the SBI? method to give feedback (both constructive and positive)
- D. Document conversations that are developmental or correctional




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**Introduction and Welcome!**



**Natalie Loeb**  
[Natalie@lobleadership.com](mailto:Natalie@lobleadership.com)



**Gordon Loeb**  
[Gordon@lobleadership.com](mailto:Gordon@lobleadership.com)



**Teri Coyne**  
[Teri@lobleadership.com](mailto:Teri@lobleadership.com)

[www.lobleadership.com](http://www.lobleadership.com)



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