

How are we doing?

360 Reviews



Outline

- ‘Performance Management’ is an essential process
- The problem with traditional “Performance Reviews”
- How the traditional 360 Process tries to overcome the problems
...and *partially* succeeds
- EPM: a next generation 360 Process

Why is Individual Feedback necessary?

- Most people participate at least annually... and dislike it!
- **But** there is a fundamental need:
 - How am I doing?
 - How can I improve?
 - Where are we going?
 - What progress have we made?
- Specifically:
 - Track progress towards Goals
 - Assign tasks to people
 - Reward good performance
 - Coach poor performance
 - Develop new leaders



“Performance Management”

The 'one-on-one' Review

- **Acceptance/Engagement:** One-on-one process tends to leave only a small comfort zone for both Reviewer and Recipient
- **Link to Organization Goals:** Variable, and is rarely direct
- **Effort Involved:** Relatively low effort, but often perceived as high effort for results obtained
- **Automation Software:** Low importance

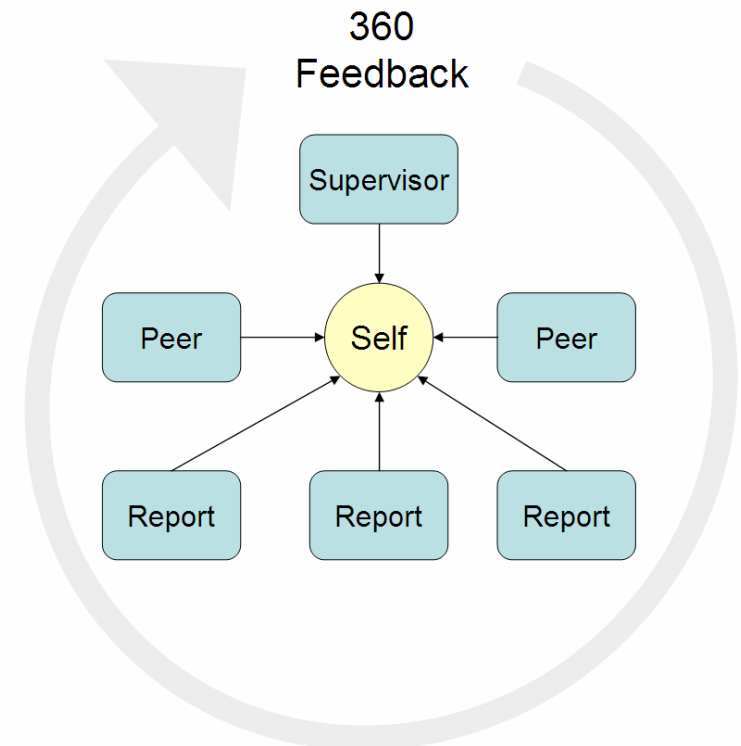
Is a 360 Feedback Process the answer?

Background:

- 360 Feedback – a short definition:

“A process that incorporates input from the individual (self), their co-workers (peers), their Supervisor and direct reports into a view of individual performance seen from all perspectives”

- Used by most Fortune 500 companies in some form



Is a 360 Feedback Process the answer? ...“Well partly”

	360 Process	Traditional One-on-One
Acceptance/Engagement	✓ Higher engagement than traditional process - "everyone's view counts"	One-on-one process tends to leave only a small comfort zone
Link to Organization Goals	Variable	Variable
Effort Involved	✗ Takes a large amount of actual work	Relatively low effort, but often perceived as high effort for results obtained
Automation Software	Desirable	

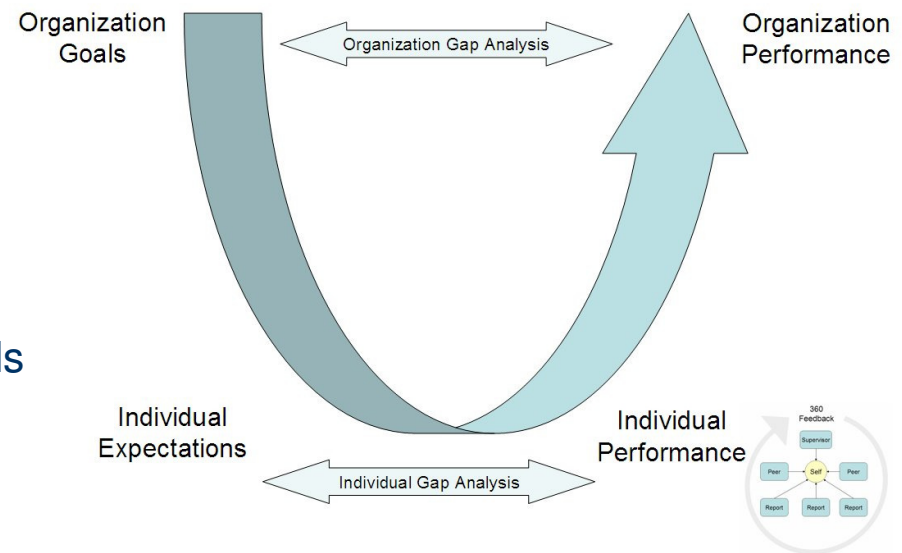
Our studies:
A manual 360 Process can easily consume several people full-time!

Employee Performance Management (EPM) An enhanced 360 Feedback Process




- Use 360 feedback process for a balanced ‘everyone’s input counts’ review

plus

- Drill down Organization Goals to Metrics, described in terms of Specific Observables
 - Measure the alignment of individual actions to overall needs
 - “What is expected of me in my job?”
- Automation software is essential



EPM Captures benefits ...while addressing shortcomings

	EPM	360 Process
Acceptance/Engagement	 High engagement and feedback – “How are WE doing?”	Higher engagement than traditional process - "everyone's view counts"
Link to Organization Goals	 Explicit linkage through drill-down and gap analysis	Variable
Effort Involved	 Automation mitigates the large amount of work	Takes a large amount of actual work
Automation Software	Essential	Desirable

Examples - A

- **Background:** Long Term Healthcare Facility
 - Stress/Burnout a serious concern, but hard to detect early and take corrective action
 - Several new managers, unsure of review process
- **Approach:** Use EPM process to...
 - Develop clear expectations for each job
 - Track warning signs (attendance, on-the-job behaviour)
 - Provide simple templates with Performance Library backing to guide new managers through writing effective reviews
- **Outcomes:**
 - Employee experience:
 - “I know what’s expected of me”
 - “I participate in a balanced and well-written review process”
 - Employer experience:
 - “I have better tracking of on-the-job stress and performance”
 - “I know my critical training/staffing gaps”
 - “My employees prefer the review write-up they receive”

•Stress
•Burnout
•Uncertainty

•Clear Expectations
•Known Gaps

Examples - B

- **Background:** Public Service organization
 - High level commitment to use a 360 Review to address critical change needs for productivity, process improvement and engagement
BUT...
 - An overwhelming manual effort needed to make it a reality

•Urgent Change
•Overload

- **Approach:** Use EPM process to...
 - Generate a clear roadmap for execution tied to Goals
 - Automate the process to make the required effort manageable

- **Outcomes:**
Employee experience:
 - “I now participate in a fair and more transparent feedback process”
 - “I know my input is valued and incorporated”

- Employer experience:
- “I have a manageable Continuous Improvement process”
 - “The process does not consume excessive time”

•High Engagement
•Controlled process
•Change Ready

EPM ‘Tools of the Trade’

1. **A clearly defined *process*** to drill down high-level organization goals and strategies to individuals
 - Requires a significant time commitment from manager / employee / consultant
but...
 - It’s a one time effort, which is offset by efficiency and savings once done
2. **Automation Software:**
 - Performance Library (track and manage thousands of drill-down items)
 - EPM Review Compilation (automatically compile all feedback for final edit and sign-off by manager and employee)
 - Gap Analysis (visual roll-up of: “Where are we going? What progress have we made?”)

→ Delivers *much* better visibility on expectations for employee *and* employer

EPM is a journey, not a place...

- Like all Continuous Quality Improvement cycles
- Milestones along the way:
 1. Define Organizational Goals
 2. Map to individual performance metrics
 3. Integrate into regular 360 review cycle
 4. Evaluate individual Gap Analysis
 5. Build Department / Organization Gap analysis
 6. Feed Strategic Gap Analysis into Organization Goals
- Getting started:
 - Decide: “Where *are* we on the 1-6 scale?”
“Where do we *want* to be?”

Automation really needed at this stage

Commit to take the first step!

So finally... “How are we doing?”

- EPM can deliver a powerfully clear answer to “How are **WE** doing?”
 - Individual
 - Team
 - Organization

Performance Improvement:
Individual → Organizational

Thank you!

Questions ?

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