

## Performance Management Workshop

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This highly interactive, practical and thought provoking workshop will explore a number of key people management techniques to enable participants to understand, motivate and effectively performance manage their teams.

In addition to providing a framework for structured appraisals and performance management, it will examine the key skills and behaviours required to set clear objectives and performance expectations, including an introduction to feedback and coaching. It will also provide guidance on successfully handling difficult conversations.

It will investigate different behavioural 'types', providing the participants with the skills they require to recognise and develop people management strategies for a wide range of personalities.

Further consultation may be required to allow this aspect of the programme to be aligned to your existing performance management structures, documentation and practice.

### **By the end of the workshop, participants will be able to:**

-  Demonstrate utilisation of an effective performance management process and structure
-  Recognise that performance management is a year-round leadership responsibility and not simply a form-filling exercise
-  Understand that effective performance management enhances organisational performance
-  Fully understand that they are accountable for the performance of their team, individually and collectively
-  Understand the key leadership and people management skills required to deliver accurate and effective performance reviews
-  Be able to provide line reports with specific evidence-based feedback to support performance ratings on a regular and consistent basis
-  Apply the skills and techniques to manage difficult conversations with people
-  Understand different employee behavioural types and views



## **Suggested pre-workshop activities**

We recommend that participants complete some short preparatory work. Its precise nature can be agreed following further consultation, however one typical example would be to get the group to identify their 'worst' and 'best' performers. The data will not be shared with the wider group on the day but will be used in smaller groups to provide 'live' examples for participants to apply the learning to.

Each participant could also be encouraged to bring examples of behavioural guidelines, objectives, 1:1 and performance review templates and any associated documentation that they use with their team.

## **Workshop elements**

### **Introductions and objectives**

We will begin by establishing the experience levels within the group and agreeing the objectives and ground rules for the day.

### **Review of key principles and practices**

In this first session it is important to establish a common understanding of the principles and practices of effective performance management. Principles that will be introduced include: a clear definition and purpose for - Performance Management, The Perception Gap, The Performance Management Cycle and Leadership Styles. We will also introduce the Performance Window and how it determines what conversations are needed in order to improve or maintain performance levels. We show the importance of timely and targeted interventions and establish a common language of performance management practice for use on the day and beyond.

### **Performance management case studies and leadership styles**

Having established that performance management is not simply an annual form filling exercise but rather an ongoing dialogue with teams and individuals, we now present a range of case studies to demonstrate how management style will also influence performance. We introduce the concept of 'style' flexibility – i.e. adapting your leadership approach to make sure that performance is optimised. Participants will see how simply tailoring your approach to the situation will deliver better results, greater motivation and improved ongoing development for the employees.

### **Performance management cycle**

Having introduced the performance management cycle, we focus in on each of the elements of the cycle and its purpose. Participants will be encouraged to self-asses their current practices and identify their own strengths and weaknesses. These strengths and weaknesses will inform the subsequent sessions and focus the participants' attention on the potential areas for development.



## **Behavioural standards and objectives**

Utilising facilitated discussion, the group will review their current practices in setting and communicating objectives (or Key Performance Indicators – KPI's). SMART principles are generally understood by most and will only be recapped again if the group requires clarity. Existing (set) objectives will be reviewed against the SMART principles. Finally, the group will break into pairs to challenge each other on their 'worst' performer. Specifically, they will test whether the behavioural standards and KPI's set have been clearly and precisely communicated and (critically) regular honest 1:1 feedback has been given, capturing any actions they need to manage the perceived underperformance. We reflect back to the 'perception gap' principles and the responsibility of the performance manager in consistent and clear communication.

## **Setting & communicating objectives practice session**

Setting objectives is only part of successfully creating clarity of expectations. In this session, we challenge individuals to conduct short role-plays to communicate the objectives effectively. We establish a structure for this delivery: What?, Why?, How?, By When?, How measured?

The session finishes with a review of the objectives that each participant brought along. Firstly, how comprehensive - do they cover all Key Result Areas (KRA's)? Secondly, how clear and precise are they? Lastly, how will they be communicated?

## **Evaluation & dealing with underperformance**

Here we revisit the performance assessment window and delve deeper into this evaluation tool. Participants will identify the typical characteristics of each performance 'type'. They will understand how they are perceived in the wider team and their impact on overall team performance. Furthermore, they will recognise their own feelings towards them and evaluate the amount of time they currently spend with each.

The participants will also create broad strategies for dealing with each performance 'type' driving home the message that performance management is for everyone, not just for underperformers. We finally focus on underperformance and share the 7 diagnostic questions for dealing with it effectively. By answering these diagnostic questions, participants will understand their value in preparing for the next 1:1/review with their underperformer.



### **Focus on 1:1's/reviews**

Having evaluated an employee's performance levels using the assessment window, we compare and contrast best practice in preparing for, conducting and reviewing 1:1's. The primary focus of this session is to drive home the need for comprehensive and accurate preparation. We will review any formal and informal documentation for capturing performance data and evidence currently in use. We recap the structures for 1:1's previously covered.

### **Note taking, recording and documentation**

In this session, we examine any current strategies for capturing the performance conversations ensuring that all data captured is factual, relevant and detailed enough to provide a fair reflection of both the performance assessment and the conversations. Any existing documentation will be reviewed and best practice established. Participants will be reminded of the need to remain objective and avoid opinion-based commentary that may be disputed at a later date. This session will provide strong and compelling reasons for communicating behavioural and results-based expectations clearly and precisely.

### **Action planning**

Action plans for this day will be distributed during the opening session and participants will be encouraged to update them throughout the day. To finish the event, these action plans will be drawn into a coherent, well planned and realistic, post-programme approach to ensure best practices are adopted and performance management is fair and consistent for all.

