

# Helix Top Tips on managing the performance of others - Tough Love

## **Why is performance management such a thorny issue?**

The term 'performance management' means different things to different people. To some, it is about taking remedial steps to resolve poor performance. To others it is a way of manoeuvring the people we don't want, out of our business.

In reality it is both, plus a whole lot more. It helps manage the culture of your business. It helps people understand what is expected of them in terms of standards, outputs, behaviours and progress. The process and structure also helps them to achieve this. Performance management is sometimes described as 'tough love'.

The Chartered Institute of Personnel & Development describes performance management as: 'a process which contributes to the effective management of individuals and teams in order to achieve high levels of organisational performance. As such, it establishes shared understanding about what is to be achieved and an approach to leading and developing people which will ensure that it is achieved'.

For this to happen, performance management should have a strategic element to it, be forward thinking and incorporate broad issues and longer term plans. Of course, for it to work it must also be operationally focused, linking different parts of the business, its teams and people.

Now, in principle, that all sounds like a good idea and one which most businesses and managers would support. The reality though, is that in general, performance management is not actually done that well. It tends to be remedial and far from strategic. It is also often the sole domain of HR practitioners, rather than a responsibility shared across the business. Performance management tends to happen (if at all) only once there is a problem, and when it is too late.

## **Why is it so hard to get it right?**

Primarily because it is difficult to implement performance management effectively and consistently across an organisation. This is because it requires everyone in the business to get on board, and that can be hard to achieve. A challenge, but certainly possible. And the benefits can be great. Organisations which have successfully implemented performance management systems generally get good feedback from employees. People know where they stand and feel supported in their efforts to do better. They are also aware of the consequences of poor performance.

So, getting a good performance management system in place takes some effort, but the results are well worth it. The following tips by no means cover all angles, but provide a check-list of some crucial things to consider:

## **1. Sell the idea of a process**

In order to get buy-in across a business, you will need to get past the 'HR-speak' and make sure that everyone understands exactly what the performance management process is, how it works, and what's in it for them. If at the end of the year, HR staff are tripping up line managers in the corridor saying "you must do your appraisals", then clearly the education process has not worked - so stick at it. Senior management needs to be squarely behind the process; after all, it applies equally to them!

## **2. Make sure people know what their job is, and everyone else's**

It is paramount that people know what their job is about - its purpose in the organisation as a whole. Equally important is the need to recognise and understand the job's relationship with that of others. How a person's team relates to others. This is about recognising the valuable interdependencies in the business. Too many people strive for independence. Job descriptions, role profiles, job titles even, need to be clear, up to date, and meaningful.

## **3. Arm everyone with something to strive for**

Once the nature of the job is understood, more specific objectives can be agreed. The concept is nothing new. Objectives help people by giving challenges and clarity over their work priorities.

Objectives are also often managed very badly. Only recently I witnessed a training manager tearing his hair out - a colleague had a key work objective to 'get to work on time'. This is not a motivating work objective. At best it is a contractual requirement, at worst the issue should be dealt with through another route - perhaps disciplinary.

Objectives should be about the important things in the job, not just the urgent or the routine. Use one of the many objective setting models (without being a slave to it). SMART is widely used and if applied sensibly, works well. At some stage, managers will have to come to a decision about the performance of every individual in their team. Are they achieving the right things? Are they succeeding? Are they excelling? Objectives are the basis of this decision. They are motivational (if set well), help people understand where they are doing well and what they need to do better.

## **4. Make the process regular and often - think bite sized chunks**

Now that people understand their jobs, know what they are required to do and how they will be measured, you'll need a process to follow to make the system work. A performance management process should allow everyone to sit down with their manager to review their progress against objectives and to consider what is coming next.

The best advice here is little and often. Many review processes revolve around a formal appraisal at the beginning / end of a year. This probably isn't enough. A monthly catch-up keeps you on top of things, helps you deal with issues as they arise, and provides the opportunity for regular feedback.

It should also avoid surprises at the big one at the end of the year. You might need the formality of an end of year review, and a form to record discussions is useful, but don't let these dominate. It is the meaningful regular discussions that add value and enable staff to give their best. Remember, complex forms inevitably seem like a burden to busy line managers. Better to keep the process simple and focussed on positive outcomes.

## **5. Get the balance right in reviews and appraisals**

A balanced review and appraisal process can be motivational and is likely not only to help improve performance but to prevent problems arising.

Here are some simple principles:

- The manager should do about 20% of the talking, and the reviewee 80%.
- Only 20% of the discussion should be on what has already happened. 80% should focus on the future (if you can!)
- Allow people to self-appraise. They will probably be tougher on themselves anyway.
- Recognise people's strengths and talents and look for ways to utilise them - for example a PA in one medium sized service business who, whilst having dyscalculia (a learning disability affecting ability to do maths and process numbers), also had a rare talent for collecting outstanding debts. Having stumbled on this ability by chance, she was encouraged by her then employer through their appraisal process, and now, some years later, heads up a credit control team at a merchant bank.
- Deal with the individual's performance issues. If they can't do the job, look for ways to support them; training perhaps or change their job. Help them find a job in which they will thrive. If they won't do the job, sort it out.

For more on ideas on conducting performance appraisals, the CIPD has a great factsheet at <http://www.cipd.co.uk/subjects/perfmangmt/appfdbck/perfapp.htm>

## **6. When you need to get tough; use your policies and procedures**

The most common approach to dealing with conflict situations, and I would count dealing with poor performance amongst these, is to avoid the situation at any cost. Why? Because confronting them is difficult. But, when poor performance goes un-checked, it can spread, cause bad feeling among colleagues and put an ever greater strain on the business. It also sends the message that poor performance is tolerated.

Well understood and communicated procedures can help managers to grasp the nettle and provide a framework to work within. And if staff know the consequences of under-performance, the process is much easier to manage. It is also motivational. We need to know the parameters.

Make sure you have a poor performance policy, a policy on absence, a disciplinary procedure, and use them whenever you should. Be fair, be ethical, be consistent, but do it. You can't go back afterwards to repair the damage.

## **7. Celebrate and reward high performance**

Celebrate success, use performance related pay, award bonuses or whatever is right for your organisation. Although common, rating scales on appraisal forms are not always helpful - there is a high risk that such scales can hijack the process and create hostility amongst staff.

A better approach is to help people understand their job, challenge them with stretching objectives, provide the support they need and praise and reward success. Remember of course to use your procedures to deal with situations that are not acceptable. This should ensure your team gets on with the job willingly and effectively, leaving you to concentrate on the bigger picture.

### **And finally - some food for thought:**

An Institute of Leadership and Management survey conducted in 2006 in conjunction with YouGov suggests that progressive management strategies go down well with young workers. Some results:

- As many as 400,000 18 to 24 year olds feel that their manager is holding them back
- 60% of respondents dislike 'old-school' autocratic management
- 80% considered approachability a desirable management trait
- 61% of future managers expect to learn their management skills from their own managers

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