Performance Management: A cycle of coaching and communicating

Article Published April, 2002, Services Magazine
Volume 22, Number 4

Ronald Cohn
Ralston Consulting Group

Dr. Ronald Cohn is a senior consultant for the Ralston Consulting Group, a 25 year old organization development firm. He specializes in helping people work together in many different industries through many services including executive coaching, team building, leadership development, work process redesign, and strategic planning. He can be reached at rcohn@getralston.com or through the company website at www.getralston.com or at 801-328-1820.

Rickey Morrison is a broad shouldered, 6'4'', regional manager for Sunstates Maintenance who packs a bull horn voice. Fact is, he never has to use it. Rickey gets maximum performance from his site managers while consistently running jobs with high inspection ratings and always at or under budget. What's his soft-spoken magic?

Rickey spends lots of time with each of his site managers ensuring that the tasks, equipment and materials, labor needed, and the budget requirements for each job are crystal clear. He is persistent in cultivating a marketing mentality which rewards them for picking up additional business whether through existing customers or new ones. He also spends half his time walking floors with his site managers, giving them specific feedback on how they might polish a marble floor or power wash a wall more effectively. Each month he meets one-on-one with his managers and gives them an in-depth, per site accounting of their month's results and during these sessions, he would also help them problem solve specific issues which they raise. In addition, he has established monthly training meetings with all the site managers on areas such as safety, budget tracking, generating "one-shot existing customer sales" and using new products. It is the site managers who both identify the topics and conduct the sessions.

Godfrey Bell, site manager for Gulbrandsen's, Orangeburg, South Carolina facility says of the monthly meetings, "We live for those sessions, we're so often guests at someone else's facility, and it's nice to get together at our own. I recently picked up some great tips on holiday pay, and learned of Betco's new high powered degreaser. Both ideas saved me time and money."

What Rickey's doing is called Performance Management, and he had no idea that there was a name for it. Performance Management is a cyclical

process which has four components; articulating clear expectations, observing/monitoring activities to ensure that expectations are met, delivering feedback to let an individual know if they are meeting those expectations, and coaching/training them toward mastery.

Establishing Expectations

Ensuring that your expectations and goals are clear and that all parties understand the given task in the same way is the first step. Managerial expectations work at two levels. On the macro level they are more than tacit job descriptions or only running jobs at certain budgetary levels. This level needs to include expectations regarding customer service turnaround times, how to treat employees, ways of solving complex manpower problems, following established hiring criteria and identifying what decisions are site specific and which ones need to be elevated. At the micro or specific task level, having people know what you want done, by when, at what cost, and with what degree of excellence are necessary basics. How often have you been disappointed when a manager didn't follow-through on an urgent customer request, saying to yourself, "how come they don't get it, I've told them a number of times?" A way to overcome these disappointments is to not assume that people "get it". Asking staff to paraphrase or restate their understanding of a task or a project prior to starting builds greater chances for success. Requiring clarity on the "front end" will save potentially wasted time for "doing the wrong task in the wrong way."

Observation

Performance Management's second step involves creating situations where you could directly observe, or monitor progress toward accomplishment of your expectations. It could involve calling on a customer together, listening while a manager handles a customer's phone complaint, reviewing a month end report, or sitting in on a problem solving session with other managers. You would be investing this time because it is difficult to activate performance management's next step, delivering performance feedback, without either observing interactions or scrutinizing a work product first hand.

Productive Communication

After speaking with many BSC's, their collective view is that Performance Management's third step, delivering feedback, was both the most difficult to do and the most often avoided. Delivering performance feedback correctly is much like acquiring any skill, you need to first know how to do it and then practice it. It is difficult to improve your golf game playing twice monthly. Avoiding giving tough messages or constructive criticism affords little practice time.

Bill Travis' key people at Dallas based, Maintenance Inc. have a long track record of giving performance feedback to their direct reports. They do it informally on a frequent basis, and formally on a quarterly basis. Each of his 16 subsidiary Presidents receives specific feedback on what they are doing well, and what they need to do differently, regarding their managerial behavior. He says, "Our managers receive feedback ranging from their appearance, clarity of speech, manner of responding to customer complaints, to how well they are grooming their potential replacements. In these sessions, we also encourage our managers to provide full information and

constructive criticism to their colleagues, a kind of leveling of the playing field. This helps takes the awkwardness out of it and all parties get pretty good at it over time."

Taking the awkwardness out of giving feedback requires knowing what to do and how to do it. Delivering performance feedback has three components. They include specifically describing an individual's behavior, the impact of that behavior on you and others, and what the individual needs to be doing differently. Managers can be given feedback on either a single incident or a behavior pattern.

Describing behavior is tough. To tell a manager that they aren't a team player is a somewhat vague, "evaluative statement", and could provoke a defensive reaction. In addition, not being a team player could mean many different things-they don't share information with others, take credit for something that they didn't do, engage in "win-lose" decision making, or a host of other possibilities. If the goal of delivering feedback is to increase people's behavioral awareness for the purpose of changing it, then delivering it at the "team player" level doesn't help them know what they need to change. Being very specific about what you perceive them to be doing and being able to describe it is a necessary first step.

Coaching Techniques

Most managers stop at that point, expecting that mere awareness is sufficient for someone to change their behavior. Describing the behavior's impact on others gives people the reason why change is needed; including how large the problem is as shown in the following example.

An area manager in the upper Midwest was perennially late with his month end, composite, budget roll up. After being told several times that he needed to have his financials done on time (with no apparent change), the President called the manager into his office. His message this time was, "John, you've consistently turned in your month's end financials late, and after telling you that's not O.K., you still have been unable to get that information to me and the comptroller in a timely fashion. What happens is that she can't provide an accurate financial picture for your area, let alone the company, and all the other area and regional managers have to juggle their budgets. You have caused quite a downstream impact. I think that this effects more than you. You need to consider your peers, because they certainly are considering you-and in a not so positive light. I need you to get your financials in on time." John has delivered for seven consecutive months!

An additional aspect in the feedback process is specifying the goal for improvement. It seems to make sense that if a person knew they had a performance problem, they would have already addressed it, yet, in reality, knowing that they had some difficulties, there is no guarantee that they would know HOW to fix it.

Art Barela, long time former owner of Phoenix based, Barela and Sons reflected on his thirty years in the business, "I found that if one of my managers came to me knowing that they were doing something which caused difficulty to others, they would almost always adopt

my suggestions on how to enact their role differently. That is in contrast to when I recognized that they had a shortcoming, their willingness to moderate their behavior wasn't quite as high." When delivering performance feedback, it is a requirement that you offer what the manager would specifically need to be doing to overcome their "inappropriate behavior", and then hold them accountable for implementing it." Art went on to describe some other key aspects of feedback delivery. "Feedback, of the constructive criticism variety, must always be given privately. Positive messages can be given publicly, but criticism never can be. That is for anyone, but in particular, our Hispanic managers, as they have a great deal of *orgullo* (Spanish for personal and professional pride), and can be quite devastated by public criticism."

Lastly, to assure that people successfully change their behavior, offering training or your on-going coaching assistance helps to make their "conscious attempts to do something differently" more "unconscious". And that's the goal, to have someone practice the new skill or behavior often enough to have it become "natural". Let's face it, behavior is tough to change, and a single piece of feedback is usually not enough.

Most of the Performance Management previously discussed involves the constructive criticism aspect of feedback. Positive feedback is also important, as it identifies behaviors you would want others to perpetuate.

Positive feedback is different than praise. Praise is a general statement, for example, "you did a good job in the meeting", "your buildings sparkle", "I like your new site supervisor, you made a good hire", whereas positive feedback is a much more specific recognition of the praiseworthy event. For example, look at the phrase "you did a good job in the meeting." What specifically would you want them to continue doing-moving quickly through the agenda, facilitating toward a series of good decisions, refocusing a point which has strayed from the discussion or something else? With reference to the "sparkling building" praise, what specifically was sparkling? Was it the floors, walls, windows, bathrooms, or other? Again, if the main purpose is perpetuating particular behaviors, then the feedback must focus on what you want continued. As a general rule, people typically deliver the amount of praise to others in direct proportion to what they need themselves, so a manager who needs very little external affirmation for their performance will probably offer little praise to their managers. It you are one of those managers, recognize that your staff may require more positive feedback than you are naturally prone to deliver.

Employing the Performance Management process; clearly stating goals and expectations, observing performance, delivering feedback, and articulating improvement goals with accompanying training/coaching consistently throughout your organization has the potential to create higher productivity, more capable managers, and most importantly, greater profitability. To avoid giving feedback merely prolongs inadequate or marginal employee performance. The old adage of "no news is good news" does not apply to salespersons, consultants, or people uncertain about their performance. For them, no news is only no news.