Getting the most from performance and development conversations

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Your own experience

Think of performance, development or career conversation that made a real difference to you:

- Who was it with and when did it take place?
- How did it come about?
- What was said that you found useful?
- How did it make you feel?
- What action and impact did it lead to?

Try and summarise:

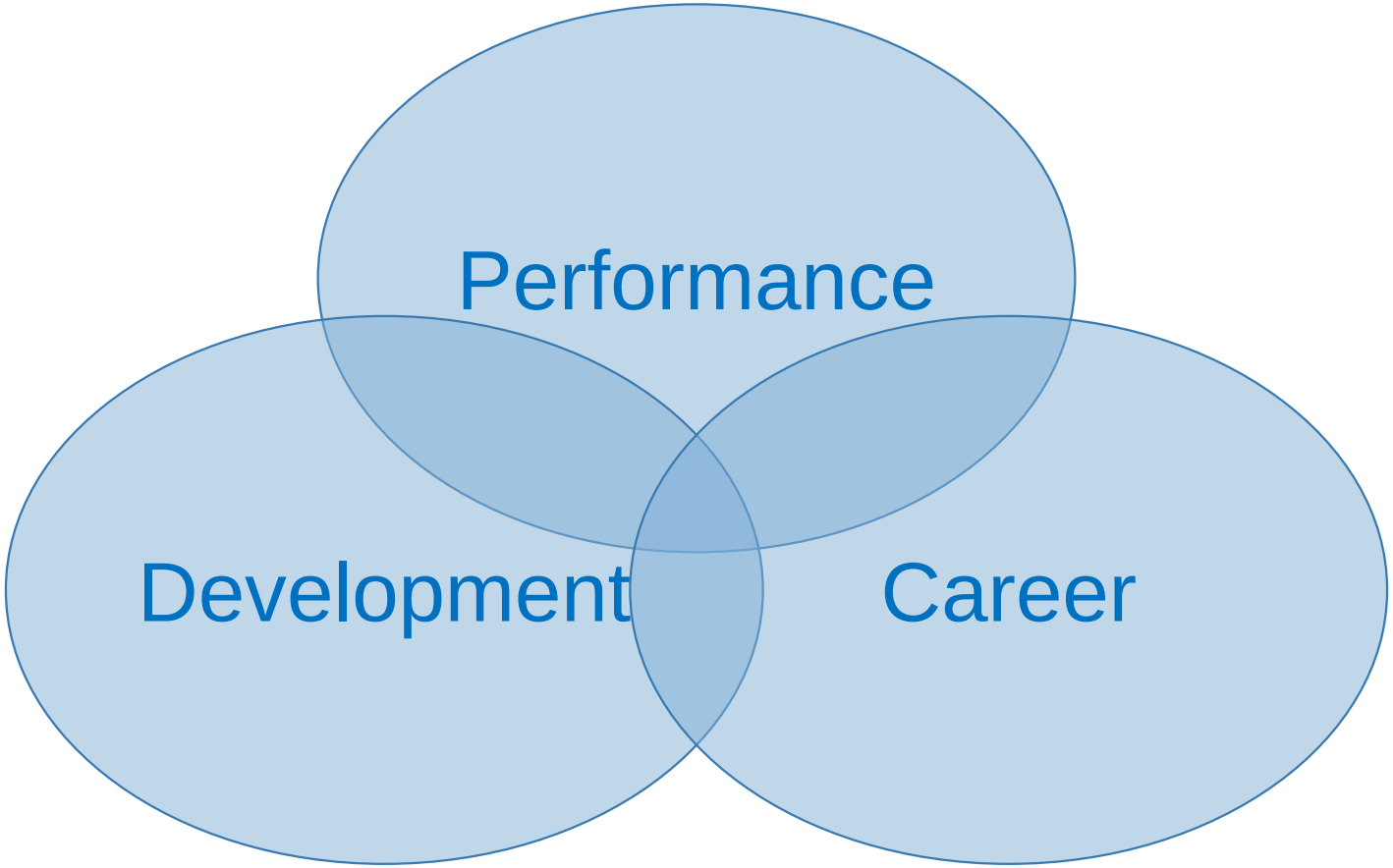
§ What was the other person doing that made this conversation so effective?

§ Were you doing anything that also made it an effective interaction for you?

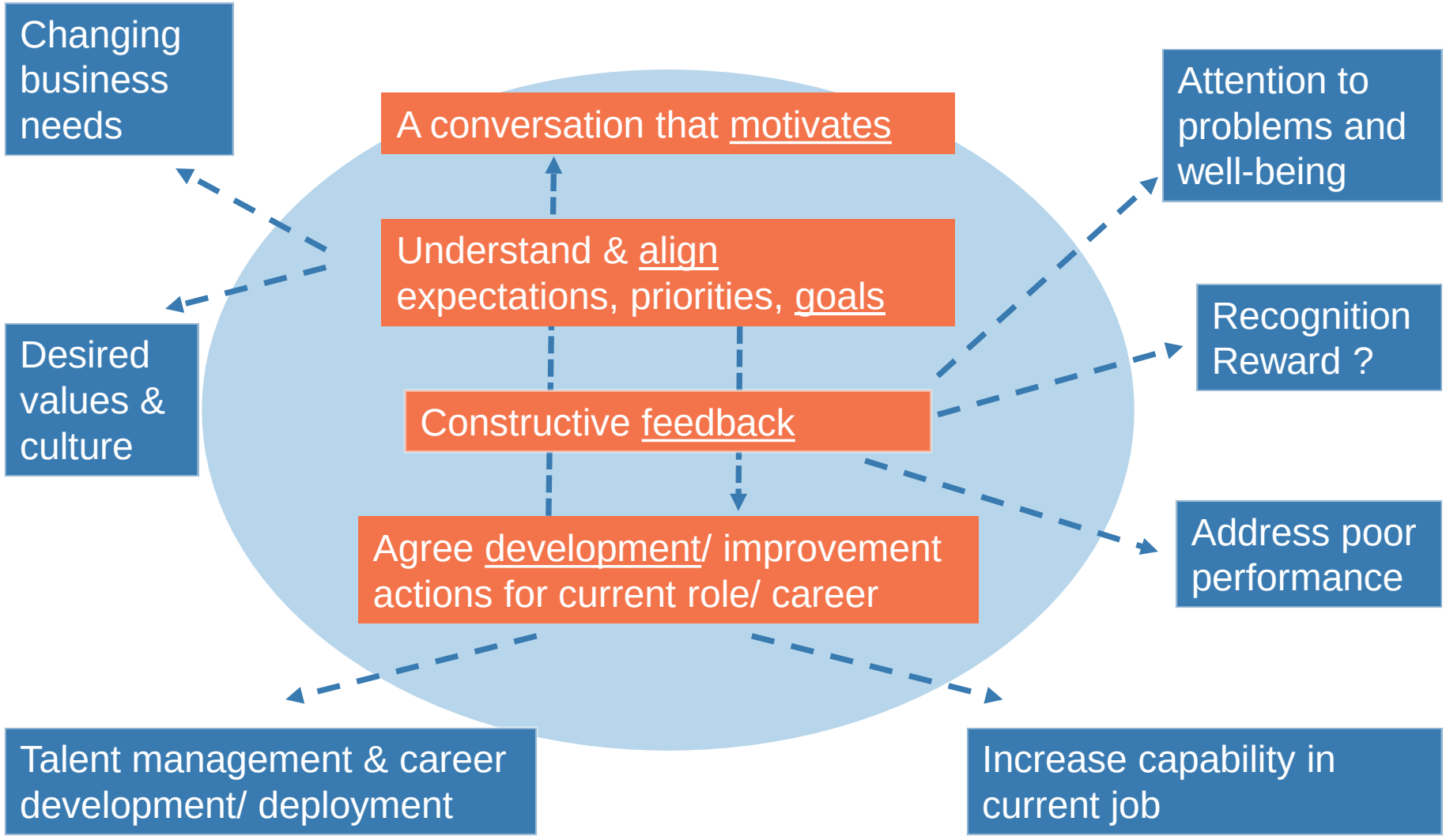
Positioning performance and development conversations

What are we expecting conversations to cover?
Why do they matter?
Where and with whom might they take place?
How are some organisations re-positioning them?

Three overlapping areas



Why do such conversations matter?
4 potential levers to increase organisational performance



Choices in positioning: where & with whom?

Where? Scope, setting and nature of conversations

- Formal… Semi formal… Informal
- Integrated across topic areas… Separate some topic areas
- Annual… Several times a year… Frequent
- Located in performance management process… as part of normal work… in learning interventions
- Documentation of assessment… Action planning
- HR owned… Line manager driven… Employee in driving seat

Who does the employee talk to?

- Boss
- Team discussions
- Boss' boss
- Senior managers, mentors
- Peers and work partners
- HR/L&D/ professional coaches
- External networks
- Trained career coaches/counsellors – specialists or volunteers

The formal review tug of war

Documentation for HR

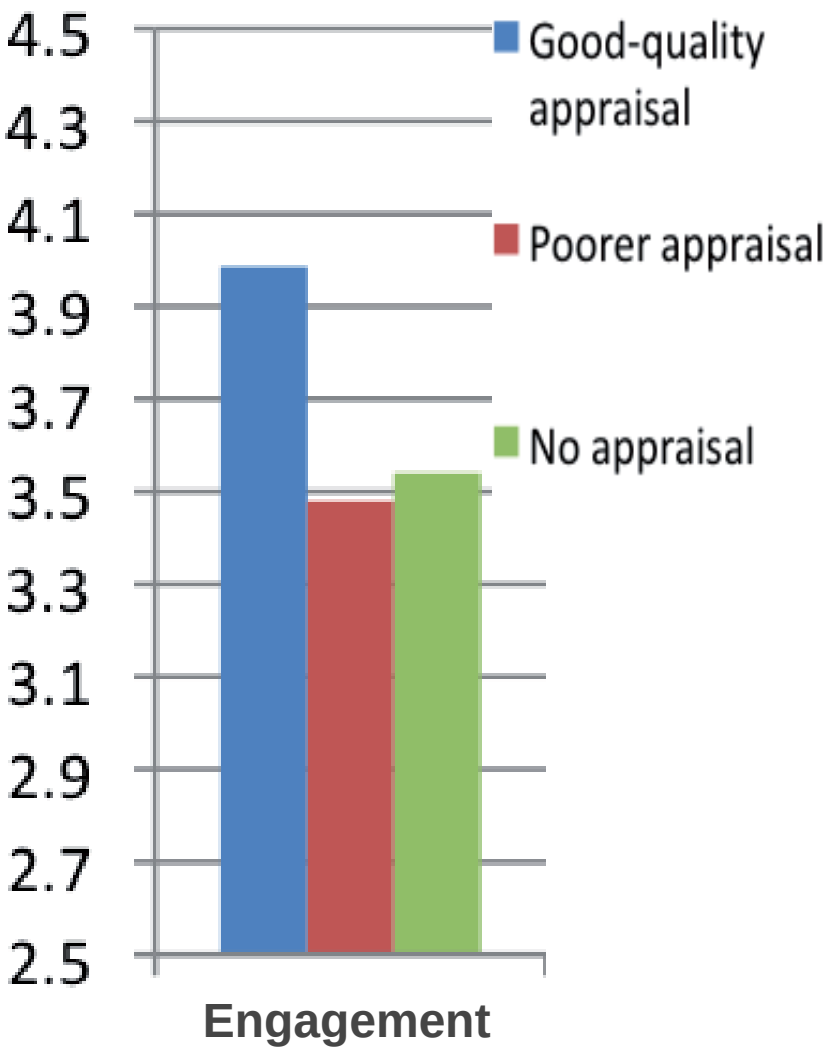
Focus on the quality of conversation

‘Let us make a special effort to stop communicating with each other, so we can have some conversation.’ attributed to Mark Twain

Well conducted formal appraisals help but ‘when they are bad they are horrid’

“Those employees who had received a well-structured appraisal had far higher engagement than those who had not.

Most interestingly, engagement was generally lower among those people who had received a poor quality appraisal than those who had received no appraisal at all.”



West & Dawson, King’s Fund, 2012

Things we know about performance conversations but often ignore

What hinders effective performance conversations?	What should help?
Focus on compliance: backward-looking assessment and form filling	Focus on action to improve performance: frequent, future-looking 1-1s
'One size fits all' process, with complex agenda	Conversation agendas relevant to employee and their situation – employee helps set agenda
Insistence on SMART objectives, cut and pasted or artificially selected – do not reflect the job	Priorities openly discussed and relevant to job, individual and organisation. Performance includes desired behaviours, role modelled from the top
Top down approach - employee 'done to'	Employee an active partner in performance management, especially in goal setting
Managers who do not know their people or how they really perform	Constructive, well informed feedback from valid sources
Rating/PRP shifts dynamics of conversations. Trust damaged if ratings/rewards seem unfair	If ratings needed, they do not dominate performance conversation and are decided with minimum fuss
Weak development action, especially for 'normal good' employees. Development as list of courses	Coaching conversations with the manager and others: delegation, rehearsal, review. Coaching skills mainstreamed
IT systems driving practice. HR measures process compliance	Practice driven by research evidence, organisational needs and evaluation of the quality and impact of performance conversations

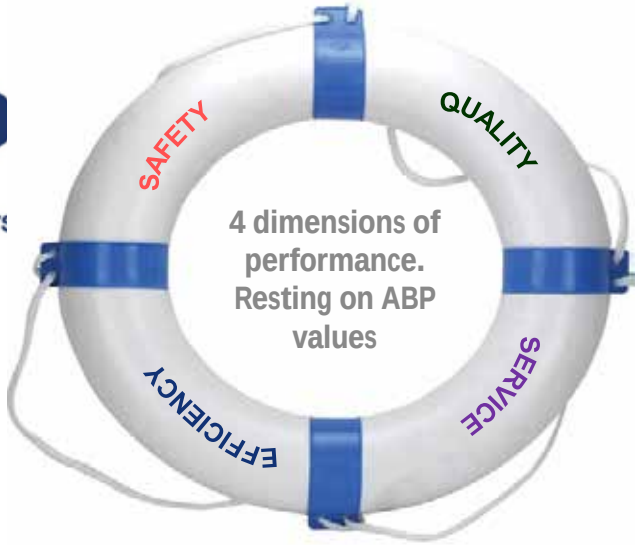
How some organisations are repositioning performance & development conversations

- One-to-ones as the primary vehicle – do not necessarily replace formal end year review
- Quarterly reviews
- Varied responses to ratings and driving reward
- Continuous feedback eg crowdsourcing, business data
- Development takes centre stage – links with continuous improvement, strengths, 70/20/10, coaching and CPD
- Potential/talent of higher interest - squeezed in or separate?
- Career support provision beyond boss – not often sustained

‘The combination of ongoing feedback and crowdsourced feedback is more effective on many outcomes than either ongoing feedback alone or ongoing feedback plus ratingless reviews.’ (Ledford et al, 2016)

Case example – ‘Check Ins’

- Front line staff in varied settings, jobs and team/managerial structures
- Performance review for this group had fallen out of use
- Key business issues include customer service, flexibility, safety and collaborative behaviour
- Demand for simple, jargon free approach



“Individual Check-In”

- Informal /10-15 mins
- 3 types of Check-In (performance, skills, career) – up to Individual/Supervisor which check in to cover & when
- Check-Ins based around 6 standard questions – an easy ‘script’ for managers & employees to use together

“Team Check-In”

- Quarterly, one or more teams meeting
- Team priorities set against company strategic pillars to help operational employees see their contribution
- Visible tracking of progress
- Agenda around 5 simple questions
- Linked to existing Management Reports
- Will make use of emerging business analytics

“90% better than we used before”

“It’s the first time our thoughts have been listened to”

“People will want to get involved, as it’s not a tick box exercise”

How are you positioning performance and development conversations?

- What do you expect conversations to cover, who are they with and how often?
- What actions are they expected to lead to and where does any data go?
- What is enabling or blocking the conversations you want to happen?

Supporting more effective conversations

What does an effective conversation look like?
A developmental style and mindset
Are we treating conversations as culture change?
What should HR do – and stop doing?

Characteristics of effective performance and development conversations at work - STAIR

See IES paper Effective performance, development and career conversations at work, 2018

Developmental management style

TALKING, REFLECTING AND LISTENING

- takes the time to talk
- helps me to reflect
- regular one-to-one meetings
- also uses informal discussions
- listens attentively

HONEST FEEDBACK AND PROBLEM-SOLVING

- clear and timely feedback
- does not respond to my mistakes by blaming me
- helps me find my own solutions to work issues

WORK AND DEVELOPMENT GOAL SETTING

- encourages me to take responsibility
- agree clear goals for work and development
- encourages me to think about my career

MAXIMISING DEVELOPMENT AT WORK

- takes time to develop me, gives support
- learning in or close to the job and from others around us
- new or challenging tasks
- supports formal training, where appropriate
- uses team meetings for learning

See paper – Adopting a Developmental Management Style

‘Getting the best out of people does involve actual effort, being interested in them, and being interested in what they do: getting them to feel included.’ *(Permanent Secretary, government department)*

‘The minute you spot a strong performer you should provide space for them to grow. You need to provide opportunities for job satisfaction, for growth, and for retention.’ *(Deputy Regional Director, INGO)*

‘When somebody comes in to see you, they have to leave your office feeling better than when they walked in…that they’re in a better place at the end of the discussion than when they arrived.’ *(Line manager, chemical company)*

Source: Hirsh and Tyler, 2017

Effective conversations as culture change

Leaders influence culture and behaviour through culture creators and culture sustainers (Schein)

Creators include:

what leaders pay attention to, measure, and control
how leaders react to critical incidents and organizational crises
how resources are allocated
role modelling/coaching
reward and status
recruiting/ promoting/ firing

Sustainers include:

organisation design
systems, procedures
rituals; buildings; stories
formal statements and charters

Summary suggestions

- More frequent one-to-one conversations
- Don’t cram all of talent management and career development into performance conversations – especially a formal review
- Get the form out of the way
- Harness the power of team discussions
- Line manager not the only person to talk to – identify other options and consider more sources of feedback
- Stop calling conversations ‘difficult’
- Train in skills and deeper understanding not just procedure – coaching, feedback, understanding development and career options, signposting
- Pull the other culture change levers – especially senior role modelling, appointing developmental managers and your own evaluation practice

How are you supporting effective performance & development conversations?

- What guidance and training are you giving or planning to give managers and employees?
- Who else will employees be able to go to for information, advice or support?
- Do you need to change other HR processes to facilitate better conversations?

Some references and further reading

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