

Welcome to Our



advo CAT series



- Part 2: Improving and Maintaining Employee Performance
- Part 3: Continuous and Effective Employee Development
- <https://theolsongroup.com/advocat/>

A Current Look at Modern Performance Management



Shari Simpson

HR Program Manager
Paylocity



Georgette Berkheiser

Senior HR Business Partner
Paylocity



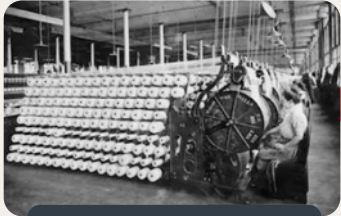
A Current Look at Modern Performance Management

Historical Influence

How has the history of managing performance, impacted its future?

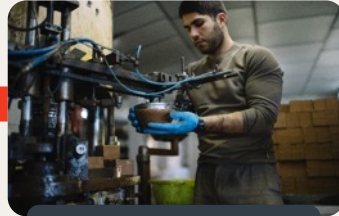


Performance Appraisal Evolution



18th Century

Industrial Revolution workers were evaluated & paid based on quantity output.



1911

Frederick Taylor introduces value of individual worker and advocating for payment of individually based financial incentives to increase output.



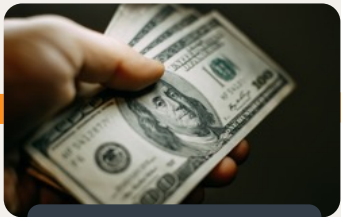
1920

Elton Mayo (Father of HR) measures the relationship between productivity & work environment



1954

Peter Drucker introduces MBO. Shift in purpose of appraisals towards employee development & feedback.



1960's

Pay for performance introduced.



1960-70

Civil Rights Act & EEOC Guidelines created pressure/need on companies to formalize, validate, and organize appraisal systems.



2000's

Performance reviews go online.



Jobs Are Agile

With increase in “Super Jobs”, Job Crafting, and Job Matrixes, the lifespan of your Performance Management plan is 2-3 years.

76%

of companies surveyed have reinvented their performance management to be more continuous.



Multi-Generational Workforce

With 5 generations including, the Silent Generation, Baby Boomers, Generation X, Millennials, and Generation Z, getting to know your employees is more important than ever.

Today's employee is accustomed to immediate gratification and instant feedback.

84%

of leaders surveyed said analytics was one of the most important trends in defining the population and meeting the needs of a diverse workplace.



Balanced Manager and Employee Relationship

Today's workforce desires authentic relationships as well as opportunities for employee development.

A key strategy for modernizing performance management is a shift on focus that embraces the whole employee (physical, emotional, and mental well-being) and co-creation.



Pay Transparency and Parity

Modern workers are looking for clarity and equality as it relates to pay scale.

Whether you include pay increases with your performance management plan or have 'decoupled' it, consider the value of maintaining open communication regarding pay rate information across your organization.

Modern Workplace

What does the modern employee want and how does that impact performance management?





They Want to Be Involved in the Conversation and Be Heard

Transparency



They also have a desire to be “in the know”

Today's Employees Are Accustomed to on Demand 'Everything'



Curate a Custom Employee Experience

Drive alignment and employee expectations that meet your company's performance goals.



Goal Management Methodologies



MBO

Management by Objectives

- Balance is sought between the objectives of employees and the objectives of an organization.
- Objectives are formulated at both quantitative and qualitative levels with employee input.
- The basic principle is growth and development not punishments
- Daily feedback and status updates at the level of coaching and development instead of static management reports



OKR

Objectives & Key Results

- Measure what Matters.
- Define 3-5 key objectives on company, team or personal levels. WHAT is being achieved
- Under each Objective, define 3-5 measurable results. HOW is the objective attained.
- Quantifiable, achievable, lead to objective grading and should be challenging, but not impossible



SMART

SMART Goals

- SMART is a mnemonic/acronym: Specific, Measurable, Attainable, Relevant, Timely.
- SMART goal setting brings structure and guidance to goals and objectives
- This method is especially effective in helping employees set goals that align with company initiatives.

Which Method Is Right for Me?

They all are! Each concept offers its own benefits and challenges.



MBO

Sales: Achieve 50 new customer bookings each month



OKR

Objective: Increase Customer Satisfaction

Key Results:

- Define score and increase it to 80%



SMART

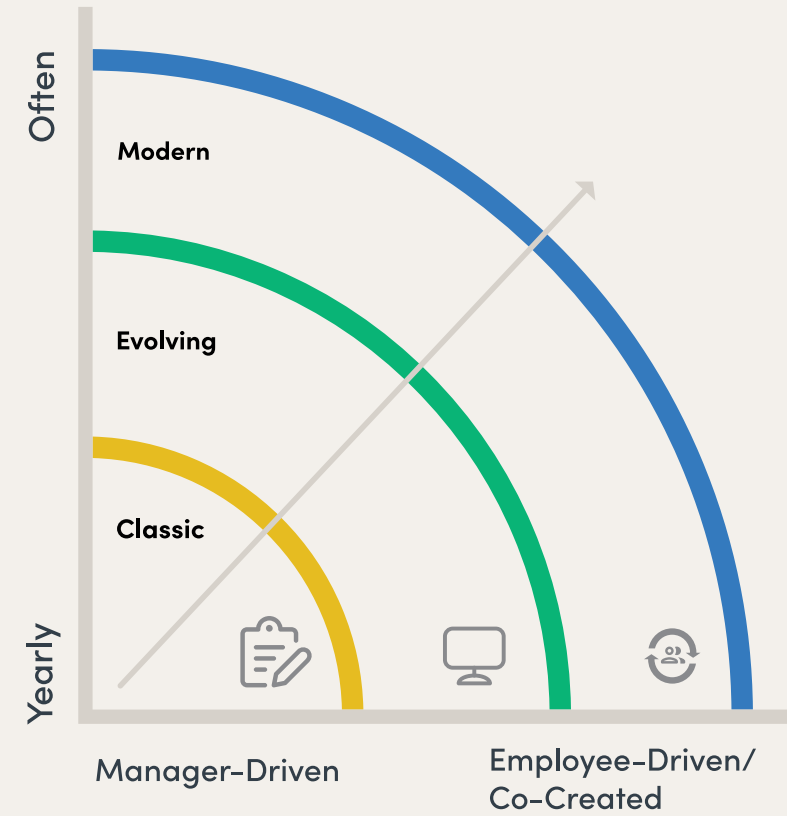
Business: Reduce overtime in the department from 100 hours per month to 50 hours per month by the end of the fiscal year with no increase in escalation requests



Location Aware

Identifying where you are will help you get where you want to go

Recurrence



Ownership

Where Are You At Now?



Classic

- Point in time, annual reviews
- Process driven
- One-Way Direction
- Manager Driven
- Service Awards
- Performance Improvement Plans (PIP)



Evolving

- Quarterly, intervals for reviews
- Cascaded
- Dual Career Pathing
- Feedback requested
- Public Recognition
- Coaching and Counseling



Modern

- Agile and flexible
- Development Objectives
- Stretch projects
- Feedforward
- Just in Time
- Manager and Employee work together to solution

Poll time!



So, Now What?

Digital should meet the employee with consumer-like performance management experiences.



1: Recognize PM Is More Than Just Point In-Time Evaluation



Consider the 6 key areas that impact managing workplace performance and how leaders can gauge their company's level of modernization and concepts for reaching desired organizational results.

● Classic ● Evolving ● Modern

2: Consider That One Size Fits One



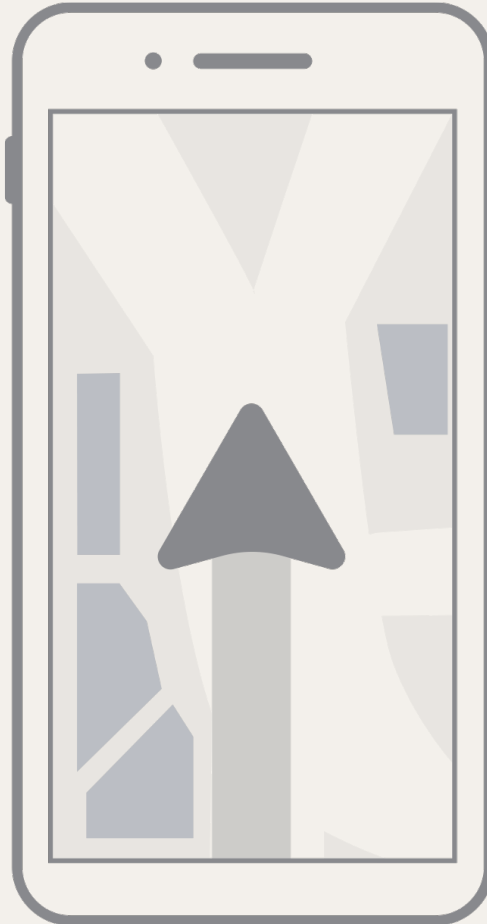
3: Try a Turn-by-Turn Approach to Managing Performance



The clearer the destination, the easier it is to determine the steps to get there.



Frequent and timely feedback will help employees stay on track.



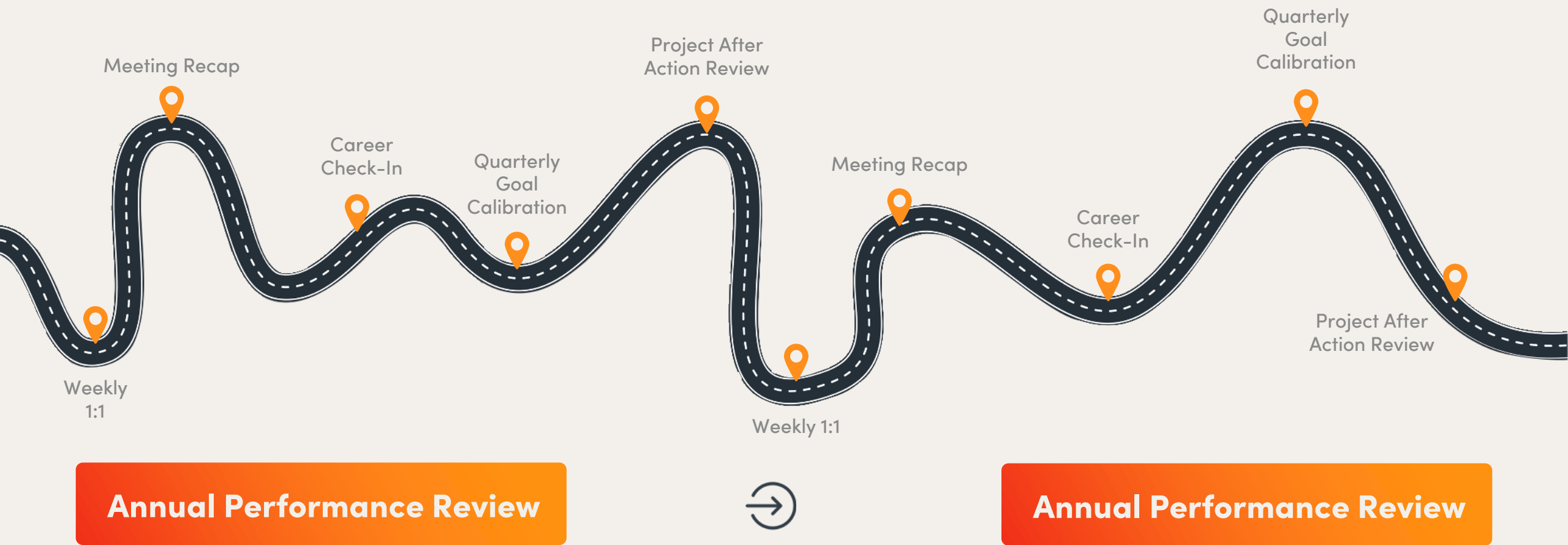
Consider using real-time rerouting to provide guidance and support.



Capturing discussions along the way can create stronger performance plans, long-term.

Performance Roadmap

Employee and manager conversations, activities, and milestones.



The Impact of Technology

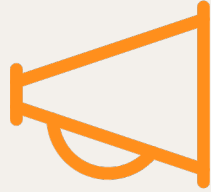
How HR Tech can accelerate evolutionary progress.



Technology Can Support Quality Dialogue



Enables goal management and career development to be more social and transparent, mobile, and digital.



Allows employees to deliver or request feedback and support continuous improvement loops.



Supports employee engagement with periodic team surveys.



Deploys data/ analytics and allows for easy integration.

Performance Journaling



Make ongoing performance tracking the norm by noting employee progress all year-round



Tracking ongoing performance conversations between you & your team quickly and easily



Discuss and note employee projects, tasks, accomplishments, and career aspirations



Invite others to participate in conversation using threaded commenting features

A screenshot of a computer monitor displaying the 'New Journal Entry' form in the Paylocity system. The form has a title bar with 'New Journal Entry' and buttons for 'Cancel', 'Save as Draft', and 'Save'. Below the title bar is a 'Select a Template' section with three options: 'Note' (selected), 'Career Planning', and 'Weekly Check-in'. The 'Note' template is active, showing fields for 'About (required)' (selected as 'Adams, Marie - Customer Support Representative'), 'Additional Contributors' (selected as 'Alba, Emily - Vice President of Human Resources'), 'Share with the About Individual' (set to 'Yes'), and 'Only visible to me' (set to 'No'). The 'Title (required)' field contains 'Weekly Project Update'. The 'Note' field is a rich text editor with a toolbar showing bold, italic, and list options; the text inside reads 'Marie completed her performance tasks and all milestones for phase 1 of the project.' At the bottom, there is a 'Keyword Tags' field with 'Coaching' selected. The monitor is a modern, silver-colored desktop model.

Goal Management



Send and manage employees' goals & appraisals in a single location



Help managers & employees clearly define & agree upon goals & objectives



Motivate employees by setting goals for them to actively work towards accomplishment

The image shows a computer monitor displaying the 'Create Goal' form in the Paylocity system. The form is titled 'Create Goal' and has 'Cancel' and 'Save' buttons in the top right corner. The form fields are as follows:

- Select Format (required):** A dropdown menu with 'SMART' selected.
- Goal Title (required):** A text input field containing '50 New Booking Relationships'.
- Goal Description:** A text area containing 'Increase new bookings from 40 to 50 in a 6 month period using referral lists and inbound requests.' There is a green circular icon with a 'G' in the bottom right corner of the text area.
- Goal Dates:** A section header.
- Goal Period:** A dropdown menu with '2019 Goals (01/01/2019 - 12/31/2019)' selected.
- Start Date (required):** A date input field with '06/01/2019' and a calendar icon.
- Due Date (required):** A date input field with '12/31/2019' and a calendar icon.
- Goal Category:** A dropdown menu with 'Booking Reservations' selected.

Employee Recognition



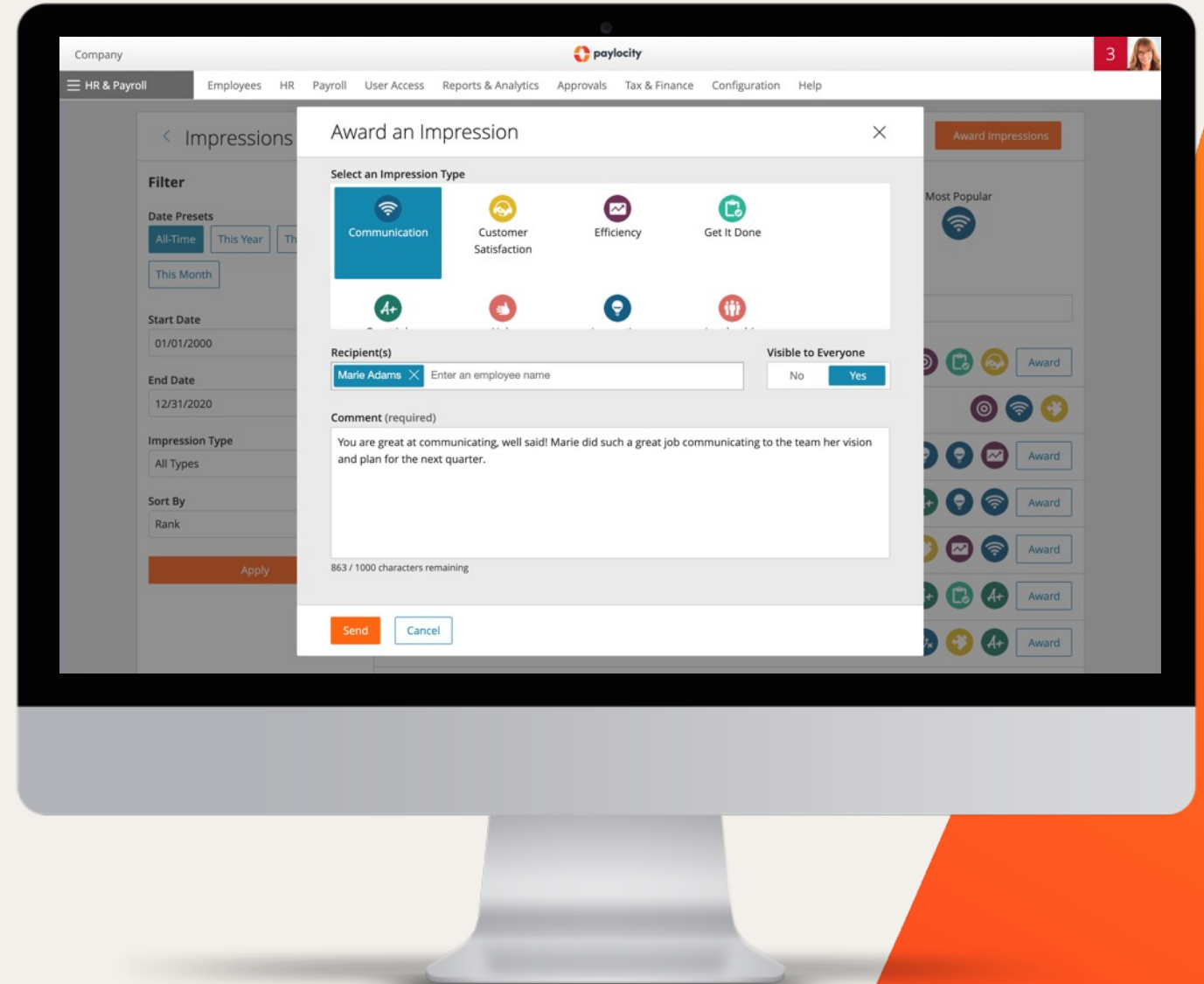
Impressions badges can be awarded via desktop and mobile devices



They can be included on the performance review form to support ratings and comments



Use default badges or create custom ones, specific to your industry or workspace



360 Feedback



Request feedback from multiple personnel to receive input on employee performance and accomplishments



Choose whether or not employees are able to view their 360 feedback in the tool



Incorporate recognition given to employees via impressions

The screenshot shows a web interface for creating a feedback request. At the top, there's a back arrow and the title 'Feedback Request'. Below this is a 'Details' section with three rows of input fields. The first row is 'Feedback For (required)' with a dropdown menu showing 'Allerdyce, Sheppard - Fulfillment Specialist' and a close button. The second row is 'Due Date (required)' with a date input field showing '01/01/2020' and a calendar icon. The third row is 'Provider Company (required)' with a dropdown menu showing 'The Garner Group [CLNT04]'. Below these is another row for 'Feedback Providers (required)' with a dropdown menu showing 'Augustine, Connor - Customer Support Representative' and a close button. The 'Feedback' section follows, with a note: 'Topics can be questions or requests that the feedback provider will be able to respond to individually.' There is a 'Topic' label and a text area containing the text 'Please provide feedback on your recent experience working with Sheppard on the fulfillment project.' and a green 'G' icon. Below the text area is a checkbox labeled 'Response Required' which is checked. At the bottom of the form is a '+ Add Topic' link.

< Feedback Request

Details

Feedback For (required)
Allerdyce, Sheppard - Fulfillment Specialist ✕

Due Date (required)
01/01/2020

Provider Company (required)
The Garner Group [CLNT04]

Feedback Providers (required)
Augustine, Connor - Customer Support Representative ✕

Feedback

Topics can be questions or requests that the feedback provider will be able to respond to individually.

Topic
Please provide feedback on your recent experience working with Sheppard on the fulfillment project. G

☒ Response Required

+ Add Topic

Performance Reviews



Allow employees to actively participate in the performance review process with self-service functionality



Build custom review forms that incorporate as many questions as you need to assess employees



Create & define success factors & scoring options unique to your organization

< Annual Performance Appraisal

Robert April
Sales Representative
[View Journal Entries](#)
Due Date
02/01/2020

Job Specific Competencies

Core Competencies

Additional Performance Areas

Peer Feedback

Impressions

Summary

This section is intended to evaluate the employee in key job specific competencies.

Customer Service

Committed to increasing customer satisfaction, sets proper customer expectations, assumes responsibility for solving customer problems, ensures commitments to customers are met.

My Rating ⓘ
-- Select --

Comments

Characters left 15000

Comments from Employee
⌚ Pending Employee Appraisal

Managing Conflict

Listens well, diffuses conflict before it starts, finds solutions to problems in a constructive manner, handles difficult people.

My Rating ⓘ
-- Select --

Comments

Technology Is Only The Half Of It

At It's Core, Modern Performance
Management Starts With the Value
of The Conversation.



Where Are You On The Continuum?



Classic

Point-In-Time, Reactive, Manager Driven, Paper Based Processes.



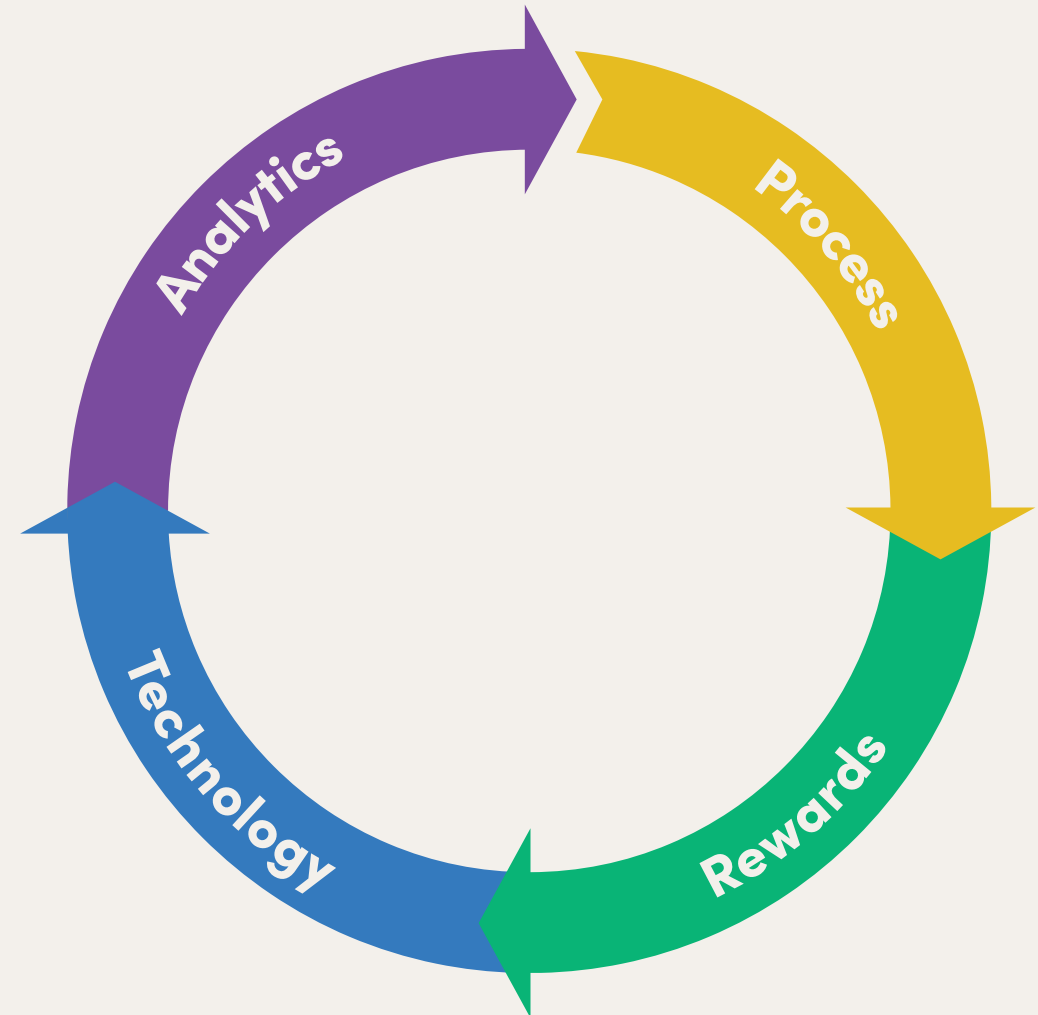
Evolving

Timeframes Slightly More Flexible, Expanded Beyond Manager and HR Driven, Computer-Based Processes.



Modern

Frequent, Online, Multi-Directional, Collaborative, Cultural, HRIS Software Utilization.

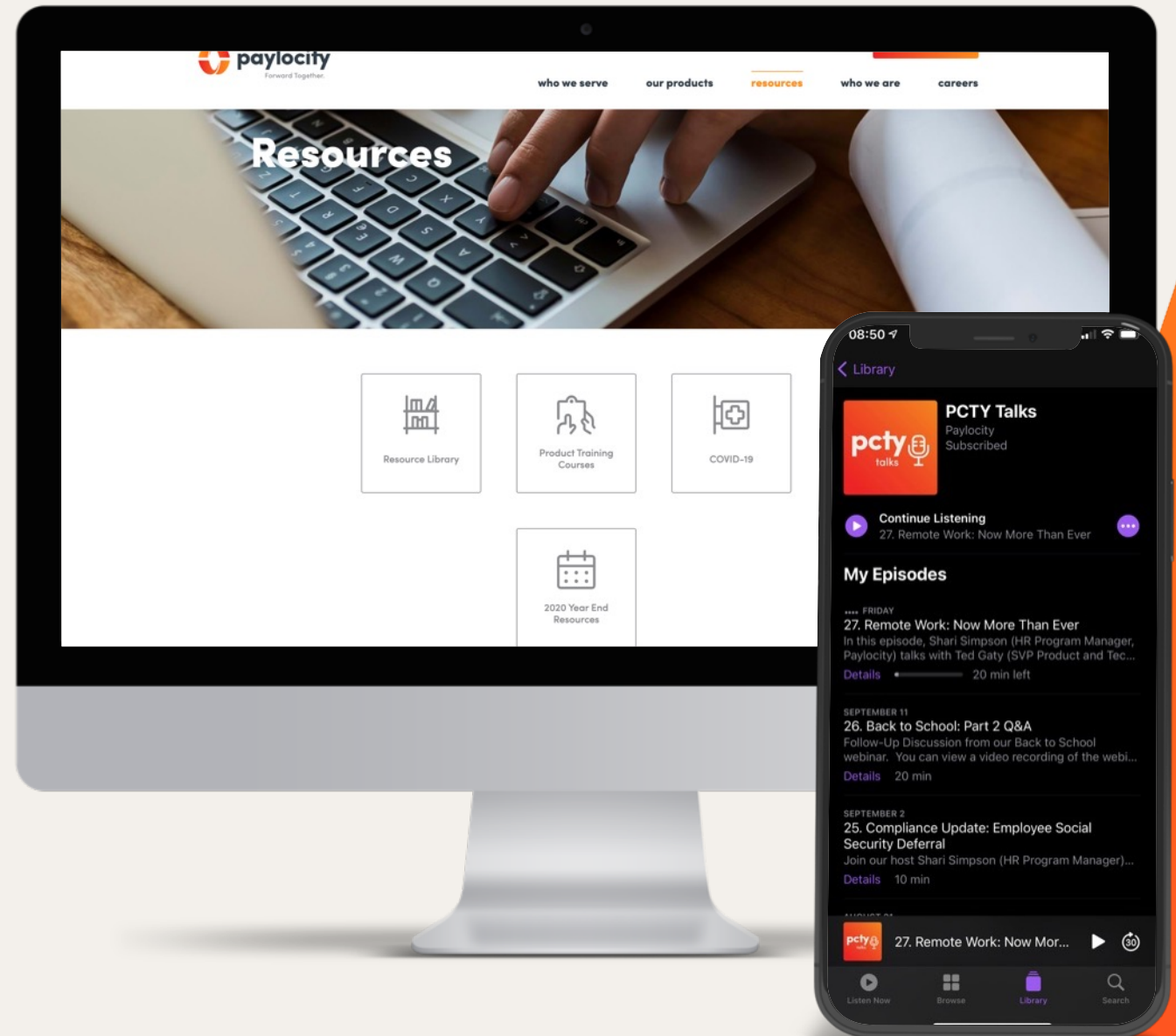
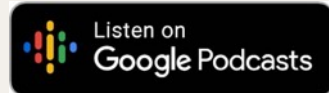
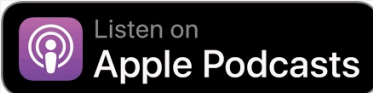




Questions & Answers

Resources

- Paylocity.com/resources
- Webinars
- Podcasts





Upcoming Content



- HR Nebraska Conference
 - Virtual August 24th – 27th
- Part 3: Continuous & Effective Employee Development
 - Next Speaker
 - Andrea Fredrickson with Revela
 - Date: September
 - More Details to Come



Giveaway Winner