[HR Program Management Quiz](#)

QUESTION

What is the purpose of a formal performance review of an employee?

ANSWER

The employee's identified work objectives, competencies and measures will be discussed through the lens of the employee and employer. The employee has the opportunity to voice his/her perspective about what went well, what did not, their strengths and weakness, ways to improve performance/competencies etc.There should be/no surprises by the time the review takes place due to the on-going feedback provided between formal review sessions.

WHY IS IT RIGHT

EMPLOYEE AND PERFORMANCE MANAGEMENT, TRAINING, TELEWORKING AND MANAGING EMPLOYEES DURING DIFFICULT TIMES.

Workforce management software

Workforce management software applications help you manage a number of daily processes and activities to make employees and contractors as productive as possible while keeping costs down.

Factories, call centres, retailers, construction and transportation companies as well as service-based businesses use workforce management software for staff scheduling, time and attendance tracking, payroll processing, overtime and paid leave management, real-time visibility into performance, and to ensure they meet regulatory compliance requirements.

Workforce Management Software Provides Benefits

- increase operational efficiency by optimizing labour utilization
- improve communications no matter where people are
- meet the changing demands of your regulatory environment
- streamline HR and managerial tasks with self-serviceoptions
- automate time tracking and approvals
- ensure information accuracy

- cut labour costs
- easily manage flexible working arrangements
- efficiently recruit, hire and on-boardthe best candidates
- have easy access to all kinds of reports
- empower your employees to make better decisions
- boost your employees' trust, morale and job satisfaction

What does workforce management software work do?

- Workforce management software was often reserved for large organizations, but cloud-basedsystems have dramatically reduced upfront costs, making them more affordable for organizations of all sizes.
- Many workforce management applications also offer mobile access capabilities, enabling employers and employees to quickly and easily find information, view assignments, monitor performance and process administrative tasks.
- A Workforce management software also makes it simple for employees to clock in or out, enter timesheets, view their profile or provide other updates. The system automatically logs the information, making it available for calculating working hours, overtime and payments, as well as cost allocations, productivity analysis and other valuable insights.

Performance Management

1. Portfolio Thinking

The broad Portfolio Thinking approach concentrates on one's contribution, value, and responsibility to the organization. **This approach requires individualized coaching, perhaps technology-based knowledge management, and most of all, an environment that fosters communication.** Training needs are identified during coaching sessions.

2. Command and Control

This is the traditional **"performance appraisal"** process. It uses the **annual performance assessment** so that supervisor and employee will have a mutual understanding and expectation of what is to be accomplished and how they are supposed to do it. Ideally, this approach also focuses on an employee's development plan. The goals and objectives should help the employee understand that their accountabilities have a real part in making this vision a reality. By concentrating on core competencies, **command and control exercises** encourage leaders to emphasize the direction the enterprise has mapped out through core competencies. Training needs are identified during performance assessment review sessions.

3. Balanced Scorecard

The balanced scorecard, BSC, is a framework for translating an organization's vision into a set of performance indicators. These are often linked to key areas such as: financial management, customer service, internal business processes, and employee learning. Training needs are identified during review of employee performance in key areas. Through the BSC, an organization monitors individual's current performance. It also serves as an indicator of efforts to improve processes, motivate and educate employees, and enhance work processes.

4. Multi-level Evaluation

Multi-level evaluations take many forms: 360 feedback, multi-source feedback, multi-rater assessment, upward feedback, or peer evaluation. **Basically, each of these terms describes the process in which employees evaluate themselves. Next, others evaluate**

them or they evaluate others. One frequent approach is that employees receive a gap analysis detailing how they perceive themselves versus how others perceive them. Training needs are identified in the feedback process.

WHY IS EVERYTHING ELSE WRONG

Performance Appraisals

A performance management discussion should be uncomplicated but detailed enough to give employees a clear indication of what is required of them in their jobs. The focus is on dialogue. It is important when a performance expectation is set to determine how it will be measured.

The performance management cycle:

1. Setting individual performance expectations

After business priorities have been discussed, the next step is to state individual performance expectations relative to the job the employee performs. The key here is to focus on expected results (not activities) and competencies (skills and behaviours) necessary for successful performance

2. Providing ongoing feedback

Ongoing feedback is the driving force behind an integrated performance management process. Performance feedback is specific information that relates to competencies and outcomes. It is timely and uses information, not subjective judgement. Its purpose is to foster insight and learning which will influence future performance.

3. Formally reviewing performance

A formal performance review is to discuss the employee's overall performance based on identified work objectives, competencies and measures. It is an opportunity to hear the employee's perspective about what went well, what did not, their strengths and weaknesses, ways to improve performance/competencies, etc. By the time the review takes place there should be no surprises because of ongoing feedback provided between formal review sessions.

Setting Individual Performance Expectations

A. BEFORE THE DISCUSSION

You the manager should:

- Position the work of the employee within the broader vision of the team and organization.
- Reflect on the work objectives and measures you wish to discuss with the employee.
- Consider the employees strengths and areas requiring more development.
- Reflect on competencies/skills required to meet the work objectives.

The employee should:

- Position their work within the broader vision of the team and organization.
- Consider their past accomplishments and any challenges they have experienced.
- Consider their personal vision and short term and long term career goals.
- Consider their current and future learning needs and priorities and support required.

B. DURING THE DISCUSSION

The manager and employee should:

- Establish together clear, specific and realistic work expectations with indicators or measures.
- Determine support required (i.e., the essential work tools you will need to fulfil your work expectations.
- Discuss knowledge and competencies required for the work and agree on work-related learning activities.
- Agree on feedback mechanisms (frequency of formal and informal meetings, feedback and coaching sources and methods to be used).
- Discuss career aspirations.

Remember:

- Allot sufficient time and attention to this discussion.
- Choose a suitable framework for discussions and avoid interruptions.
- That objective established together and deemed achievable have a better chance of being achieved.
- Open, honest two-way communication, active listening, constructive feedback and mutual respect are essential to establishing a climate of trust conducive to commitment and good working relations.

C. AFTER THE DISCUSSION

The manager and employee should:

- Follow-up on agreed upon actions.
- Start thinking about progress follow-up.

Remember:

- Periodical follow-up makes it possible to make revisions to the Performance and Learning Agreement due to changing priorities.

D. PROVIDING ONGOING FEEDBACK

The manager and the employee should:

- Look at progress achieved in relation to performance expectations.
- Meet periodically in accordance with the agreed-upon method.
- Highlight the employee's achievements.
- Make necessary changes with respect to resources, deadlines, learning needs, etc. in order to take new circumstances into account.

You, the manager, should:

- Recognize the employee's achievements and positive performance aspects in an appropriate, timely fashion.

Remember:

- Be specific when providing feedback to an employee in order to strengthen certain aspects of the employee's performance or behaviour.
- Be Promptly recognize good work.
- Be Sincere feedback and a simple thank-you are the best motivators.
- Be Identify problems promptly and provide employees with timely guidance,

coaching and desired corrective measures.

Remember the following steps:

- Meet the employee privately in a non-threatening environment.
- Put the problem in context.
- State the difference between facts and agreed-upon measures.
- Help the employee identify causes and find solutions, then offer the employee your assistance.
- Provide necessary follow-up by agreeing on an action plan.

The employee should:

- Promptly report circumstances that may have an impact on the achievement of their objectives and require changes to initial plans.
- Obtain information, instructions, advice or necessary training at the appropriate time.
- Follow-up on agreed upon measures with the manager.

The employee should remember:

- They share the responsibility for managing their performance and their training.
- It is up to the employee to report their requirements or problems to their manager and then help find solutions for them. The manager cannot guess what they are or find solutions for them alone.

E. FORMALLY REVIEWING PERFORMANCE

BEFORE THE MEETING

You the manager should:

- Review the employee's overall performance and achievements based on set work objectives and feedback provided during the review period and/or received from other sources as was discussed with the employee.
- Review competencies the employee displayed to meet their work objectives (the HOW).
- Consider the total value of the person's contribution to the organization.
- Identify areas where improvements or changes would be worthwhile.

The employee should:

- Conduct his/her own self-assessment based on set work objectives and feedback received during the review period.

Ask himself/herself:

- What went well and/or went not as well?
- What could have been done better or differently?
- What are their strengths and weaknesses?
- How can the organization/manager help them to improve their performance and/or their competencies?

DURING THE MEETING

You, the manager, should:

- Ask straightforward questions and listen to the answers attentively.
- Point out achievements, strong points and determining success factors.

- If necessary, lead the discussion to things that did not work so well and look for causes and solutions.
- Discuss ways in which you or the organization can help the employee do his/her work better.
- Be prepared to give clear, logical answers.
- Take the time to talk about his/her achievements; this is the opportunity to highlight his/her contribution.

Remember:

- Allot sufficient time and attention to this meeting, choose a suitable environment for discussion and avoid interruptions.
- Open, honest two-way communication, active listening, constructive feedback, mutual respect and a willingness to learn are essential in making discussions about performance a positive, worthwhile experience.

The employee should:

- Be ready to talk, if necessary, about his/her problems, their causes and ways to correct them.
- Be ready to offer solutions if comments are made on improvements needed by the manager or organization.

AT THE END OF THE MEETING

The manager and the employee should:

- Sign Performance and Learning Agreement to acknowledge that a review discussion has taken place.
- Discuss and document any required follow-up measures and agreed-upon work expectations for the next review period.

Performance Problems

It is the goal of performance management to position employees for success. It is premature to conclude that you have a performance issue until you have taken into account all the factors that may be contributing to a performance problem.

F. ANALYZING PERFORMANCE PROBLEMS

1. Organizational and Job Factors

Organizational and job factors outside the employee's control may affect the employee's ability to meet expectations. Some of these include:

- Poor leadership/role modelling.
- Lack of clarity concerning expectations, context, linkages, roles and responsibilities, authorities, etc.
- Inadequate tools/support.
- Cumbersome work processes.
- Unrealistic policies and procedures.
- Changes in systems or equipment.
- Work environment (poor information sharing, harassment, discrimination, insensitivity, etc.).
- Lack of rewards for effective performance and consequences for poor performance.
- Lack of feedback.
- Lack of influence on how the work gets done.

When the cause of the performance problem is related to organizational and job factors outside the employee's control, the manager is responsible for taking action to correct the problem where he/she has authority to do so or to bring the issue to the next level of authority.

2. Individual Factors

Some individual factors that may influence the employee's performance include:

- personal circumstances (e.g., marital or family difficulties, financial problems, bereavement, etc.)
- physical and/or emotional health problems (e.g. medical issues, substance abuse, depression, anxiety, etc.)
- inappropriate personal behaviours
- insufficient knowledge/competence to do the job
- a mismatch to the job

When you are aware the employee is facing personal circumstances which might affect the employee's ability to meet the performance expectations, it is a best practice to make reasonable efforts to accommodate the employee in the short term. The employee remains responsible for performance. If performance still fails to meet expectations, you should clarify expectations and the consequences of not meeting the objectives.

Poor Performance versus Misconduct

It is sometimes difficult for managers to distinguish between poor performance and misconduct.

Poor Performance

- Unable to do job because of incompetence or incapacity
- Not willful
- Subject to guidance and/or coaching/training
- May result in demotion or termination for cause
- Opportunity for complaints

Misconduct

- Breach of discipline
- Behaviour rather than performance
- Willful refusal subject to progressive discipline
- May result in demotion or termination for cause
- Grievable and adjudicable