



Why Performance Evaluations & Effective Feedback Matter

Presented by Aimee Pedretti, GPHR, SHRM-SCP

February 7th, 2023

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Welcome to the Webinar!



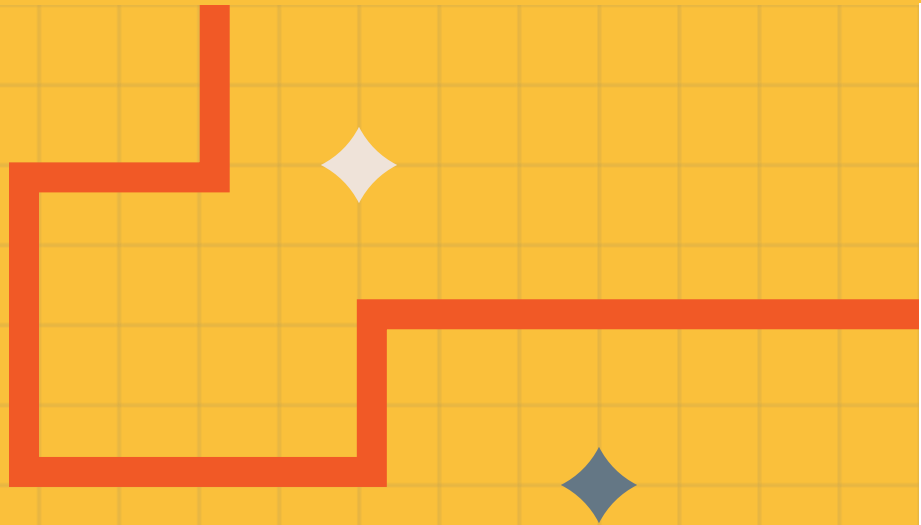
- We will email you the recording and slides within 24 hours.
- Please participate in our poll.
- Please use the Q&A box for questions.

Our Speaker

Aimee Pedretti, GPHR, SHRM-SCP
Sr. Manager, HR Consulting & Strategy, Mineral



Agenda



- Setting the Stage
- Creating a Performance Evaluation
- Goal Setting
- Delivering Feedback
- Q & A

Setting the Stage

What is a performance evaluation?



Coaching

What It Is

A management style that encourages employee development and growth.

“A coaching view affirms that by inspiring discovery, reflection, and persistence in another person, that person becomes capable of significantly greater achievement, deeper and broader thinking, and more consistent expression of their values over time.”

-Center for Creative Leadership

What It's Not

- Progressive discipline
- Telling employees what to do

Performance Evaluation Purpose



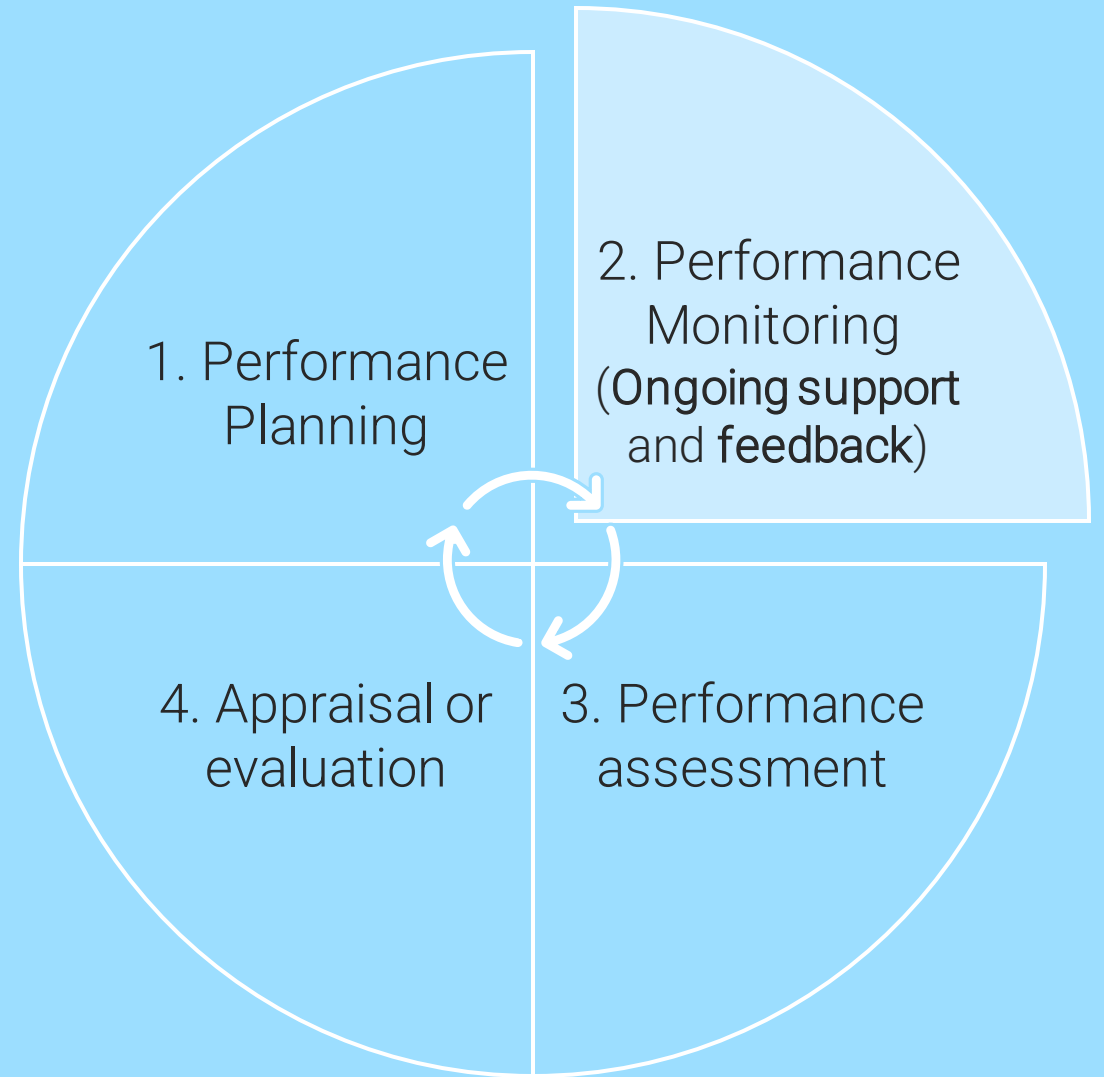
The process of reviewing how well employees perform their duties during a specified period of time.

Purpose

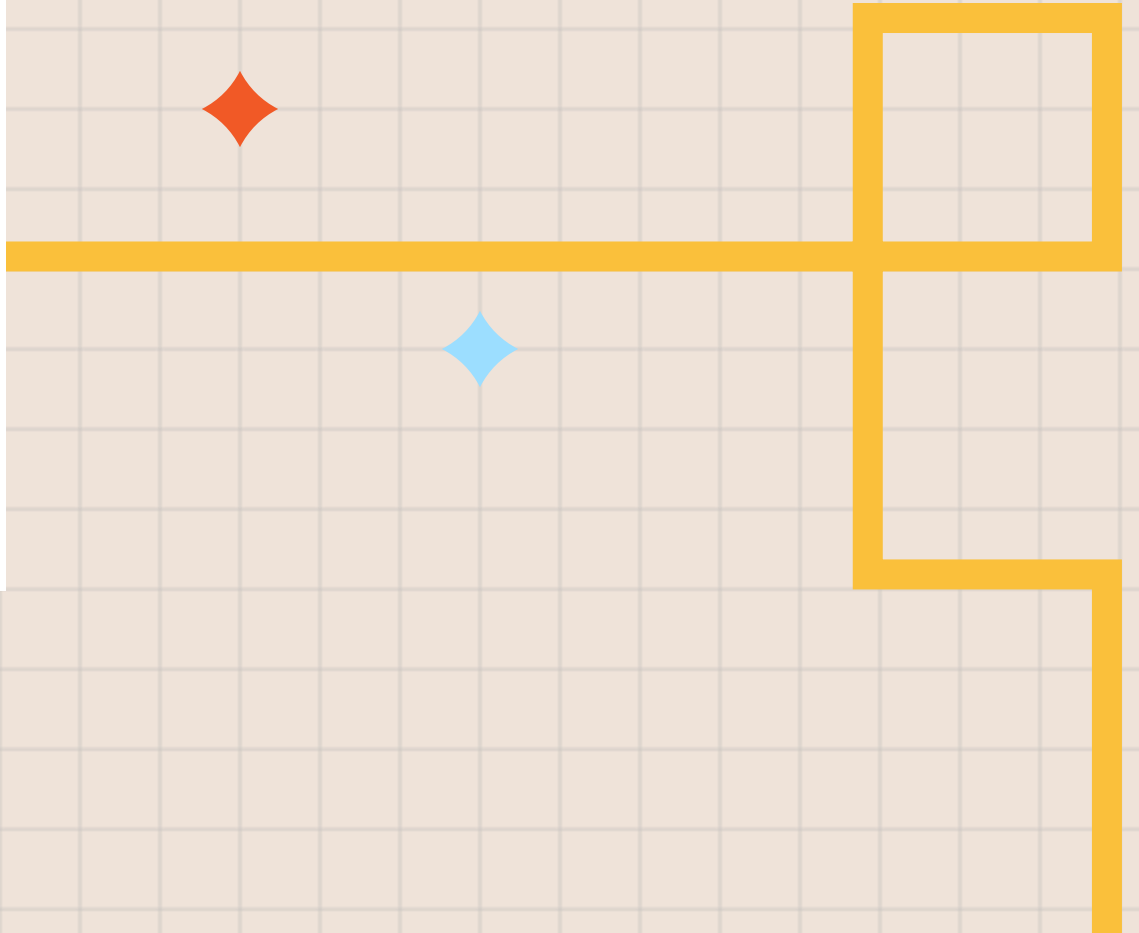
- Align expectations and link goals to Strategy
- Give positive performance feedback and recognition
- Discuss areas of improvement
- Identify development opportunities for the future
- Link performance to compensation decisions

Performance Management Cycle

Feedback and **coaching** are crucial at every step.



Creating a Performance Evaluation





Timing

- Frequency of Formal Evaluation
(Annual, Semi-Annual, Quarterly)
- Informal ongoing feedback via 1:1 check-ins



Possibly Included

- Manager review
- Self assessment
- Coworker assessment
- Future goal setting

PUSH

Manager Review: Competency Ratings

- **Defined Behaviors:** Communication, Teamwork, Leadership
- **Rating Scales:**
 - Numeric (1 to 5)
 - Adjectives (*needs improvement, satisfactory, excellent, etc.*)
 - Expectation-based (*meets, exceeds, etc.*)
 - Consistency (*most of the time, rarely, etc.*)





Manager Review: Feedback

- Goal completion
- Specific project(s)
- General performance



Self Assessment

- Will generally mirror the manager assessment
- If using a scale or competency rating, set guidelines for calibration
(e.g., "We expect that most employees doing what is asked will score a 3 of 5.")
- Consider including a section for employees to express anything else they did not think was adequately covered

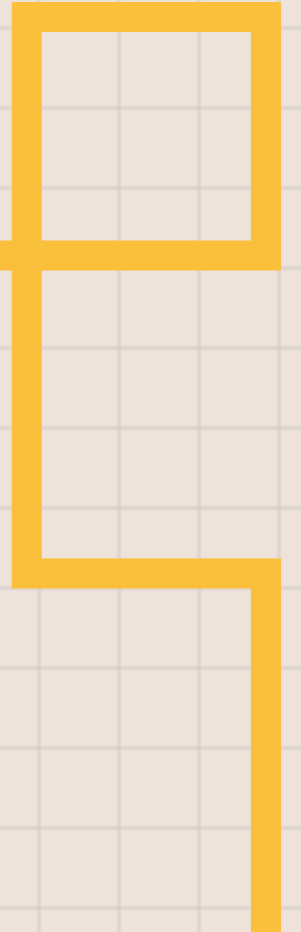


Coworker Assessment

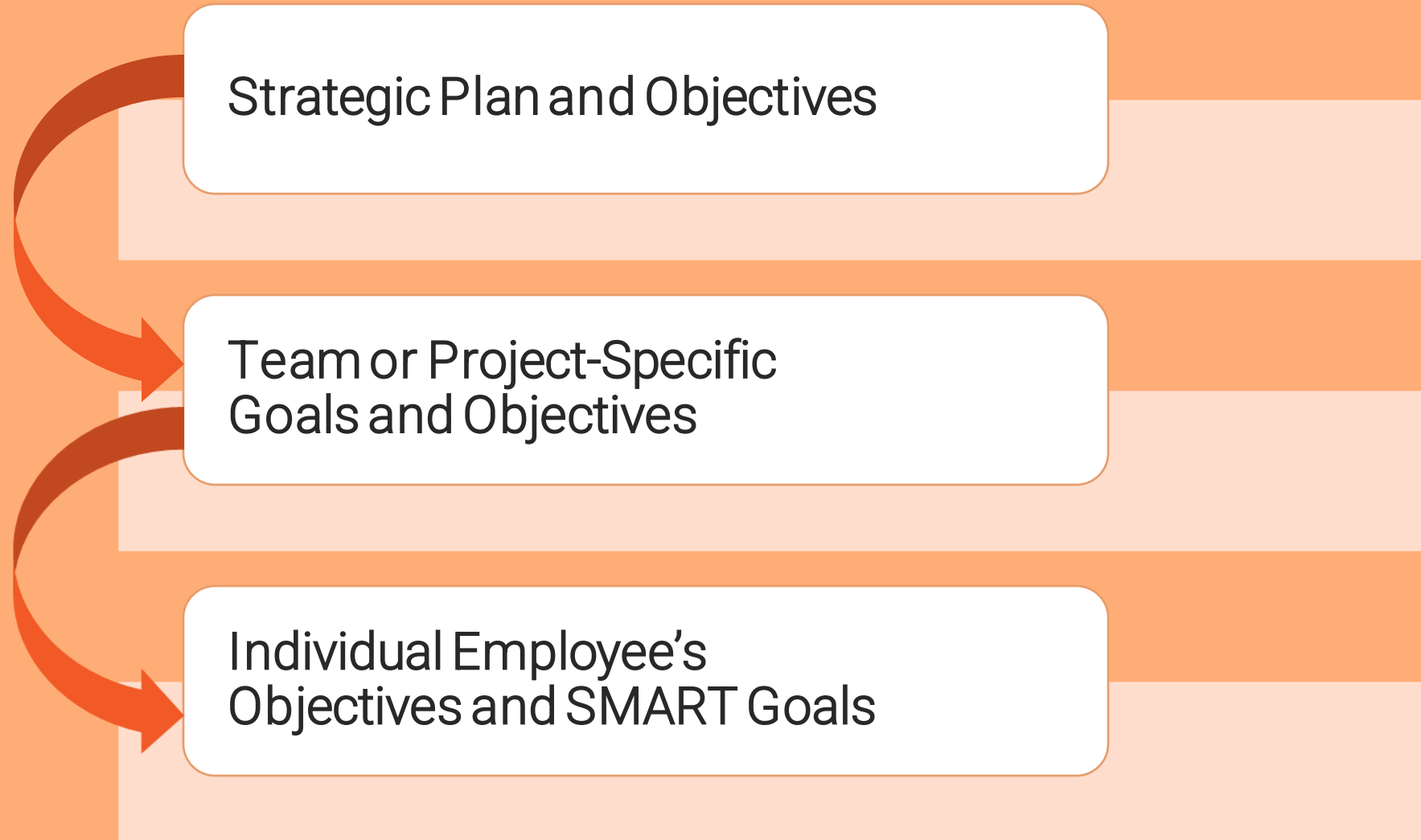
- “360-degree” review
- Consider who to request feedback from
- Not everyone will understand the specifics of another position
- Can be hard to ensure anonymity



Goal Setting





Goal Setting





Goal Setting and Development



Can be done as part of the performance evaluation or as a separate discussion.

SMART GOALS


- Specific,
- Measurable,
- Attainable,
- Relevant,
- Time-Based

SMART Goals

SMART Goals	<u>Not</u> SMART Goals
Enter financial data on department expenses into Company system by the 1 st of each month.	Enter financial data timely.
Improve customer service satisfaction score by 10% by the end of the calendar year.	Provide great customer service.
Define a plan to delegate at least 5 key responsibilities to team members by March 1 st .	Delegate more tasks.



Positively Stated Goals

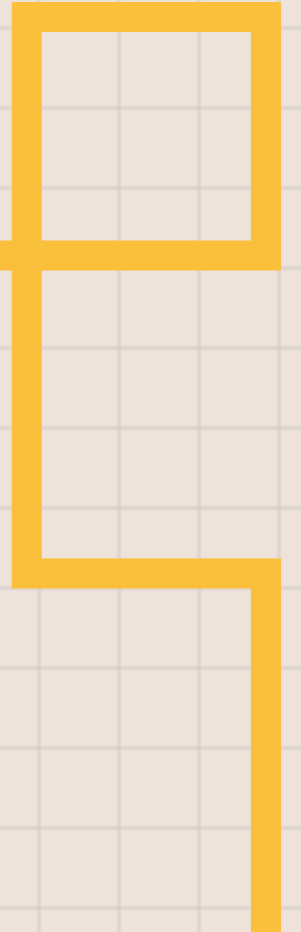
- Inspirational goals keep energy levels and motivation high
 - You'll get what you focus on. Reframe negatively stated goals to the positive
 - "Meet or exceed your Q1 sales goals" vs. "You must not continue to fall behind on sales goals."
- 



Poll Question

How often does
your company
conduct
performance
evaluations?

The Meeting and Follow Up





Preparing for the Meeting

- Schedule in advance
- Complete and share forms early
- Determine most appropriate location



Performance Evaluation Meetings

- Avoid the “feedback sandwich”
- Lead without monopolizing the discussion
- Take notes

Follow Up

- Complete documentation and put in employee file
- Review action items
- Schedule necessary follow-up meetings
- Plan informal and frequent check-ins on goals

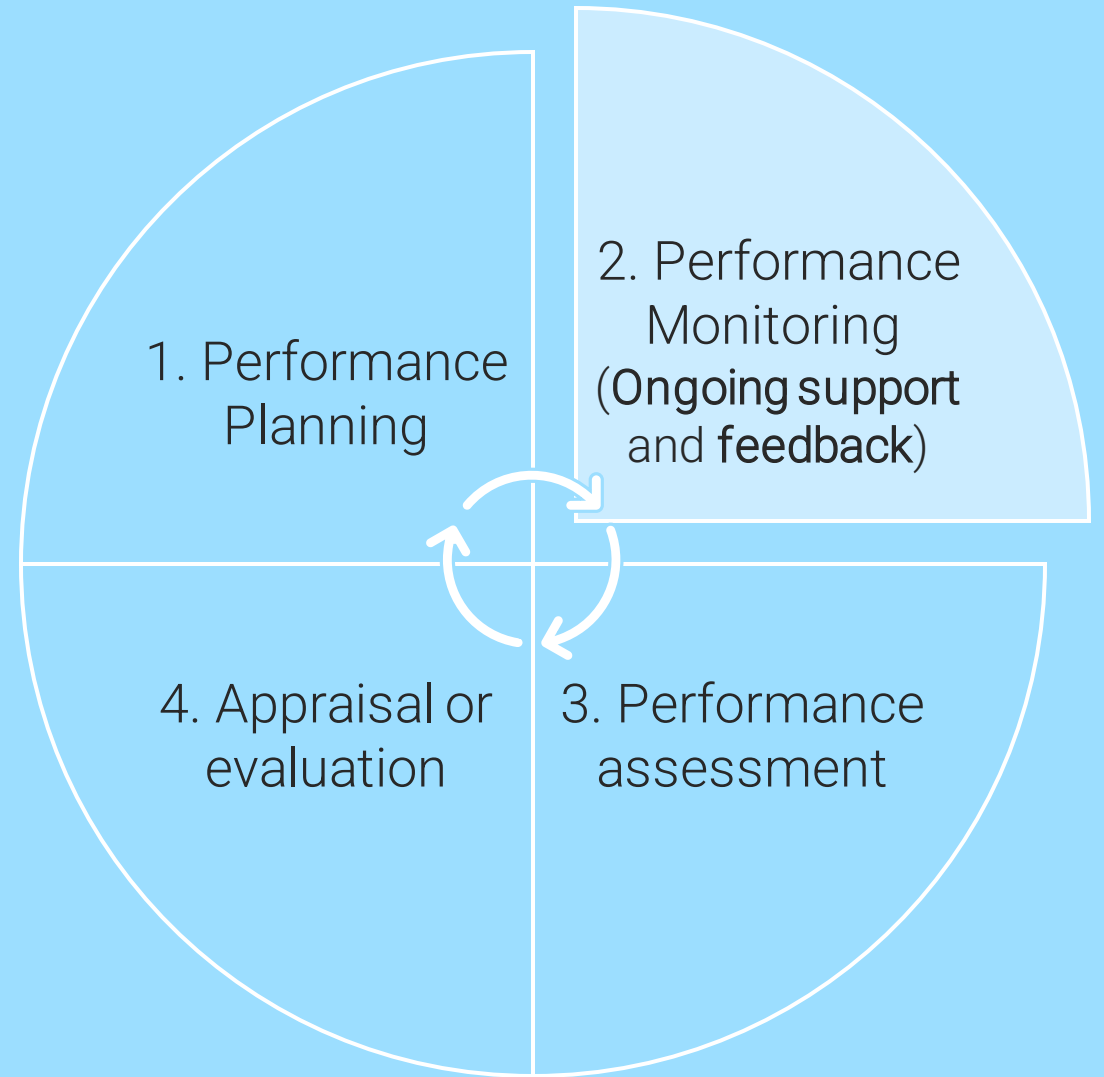


Delivering Feedback



Performance Management Cycle

Feedback and **coaching** are crucial at every step.



Common Communication Missteps

Common communication missteps that managers — new and seasoned — inadvertently make:

1. Assuming that employees know what you want
2. Not telling an employee how they are doing
3. Not telling employees anything at all



What is Feedback?



Information to use for improvement/growth:



- Affirmation/praise
- Constructive/corrective/redirecting

Neuroscience and Feedback

- Feedback activates the body's threat response
- Threat response limits ability to give/receive feedback
- Nature of perceived status differentials can trigger stress reaction
- Goal: minimize threat response



Coaching Style: Use Open-Ended Questions

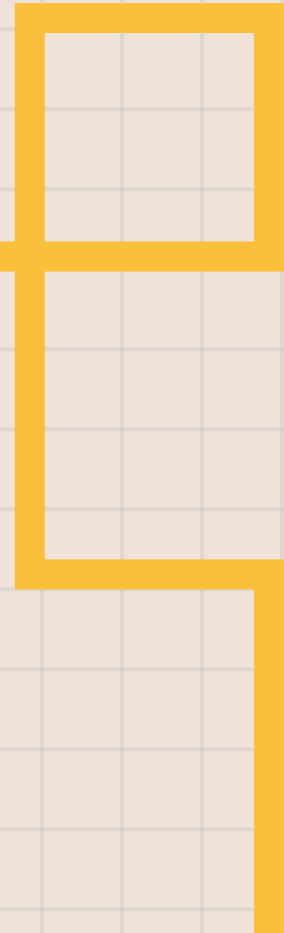


Questions should not be able to be answered with just a *yes* or *no*.

Examples:

- “How do you think that went?”
- “Can you tell me more about what happened in this situation?”
- “I’d love to hear your perspective about. . .”

Mindset



Mindset: Growth vs. Fixed



Growth Mindset

Assumes that intelligence and ability aren't fixed, and people can learn through effort and trying new things.

Intelligence and ability can be developed, like a muscle

Fixed Mindset

Belief that intelligence and ability are fixed traits that can't be changed, like eye color

Fixed Mindset ("Be good")

- Focus on an employee's credentials, on their proving, demonstrating skills, and performing better *than others*
- Failure means an employee isn't capable (= missed learning opportunities)

Examples

- *The employee made a mistake and I doubt they can improve.*
- *I should look for a new employee who has the skills.*
- *He's just not a very good manager.*
- *You either have the soft skills for the job or you don't.*



Growth Mindset ("Get better")

- Focus on helping employees improve, develop skills and perform better *than they did before*
- Coach employees to persist through obstacles, learn from feedback, be inspired by others' success

Examples

- *It didn't turn out how we hoped, but this is a great learning opportunity.*
- *He's much more confident than six months ago.*
- *She's got great leadership potential and is improving upon her coaching and feedback skills.*

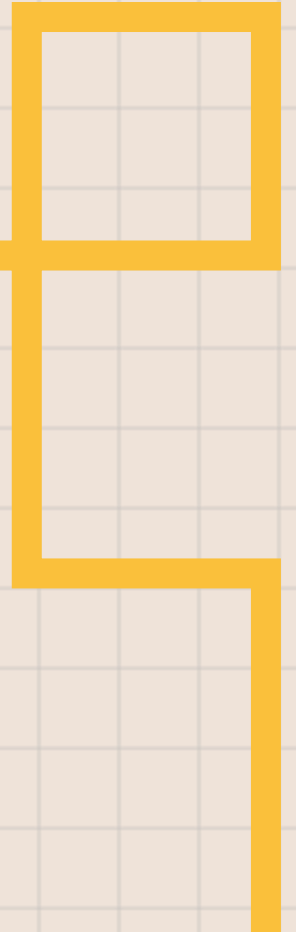


Shifting to a Growth Mindset

- Assume a positive intent and check perspective
- View personal characteristics as changeable
- Come from a place of fostering improvement
- Respect different ways of doing things
- Focus on learning when there are missteps
- We can learn to be better at giving and receiving feedback!



SBI Feedback Model



SBI Feedback Model



Situation



Behavior





Impact

Then, check for the employee's perspective and clarify next steps.



SBI Example



“I just read the report you sent. It was well-researched and I liked that you backed everything up with data, particularly the things that might be seen as controversial. Your points about X were really thought-provoking and I’m motivated to consider how we can implement these ideas at the Company.”



SBI Feedback Model: Situation

- Name the specific context: when and where?
- Don't say "you always" or "you never"
- "This morning at the Jones client meeting. . ." vs. "I've noticed at client meetings you always. . ."





SBI Feedback Model: Behavior

Employees are more likely to be receptive to objective feedback that doesn't feel like a personal attack

- Focus on the specific observed behavior, specific quotes employee said
- Avoid judgments, interpretations and opinions
- Don't guess at the employee's motivation or intent



SBI Feedback Model: Impact

Describe the results of the employee's behavior such as:

- Impact to the organization
- Impact to the department or team
- The way you felt as a result of the behavior



Ineffective Praise

“You did a great job dealing with that angry customer last week. You’re so good with customers!”



SBI Feedback Model

“You remained calm when talking with the angry customer and really listened to their concerns. You gave them several options to resolve their concern. Your approach deescalated the situation and enabled us to avoid losing an account.”



Ineffective Corrective Feedback

“What was going on with you at the client meeting? I get that you’ve been really busy and focusing on other projects, but you were completely unprepared today and gave incorrect information to the client.”



SBI Feedback Model

“At the meeting with the client this morning, your slides included information from another client’s project which caused a great deal of confusion. I’m concerned the client has lost confidence in us and we’ll need to rebuild trust to maintain the account.”



SBI Recap



Situation



Behavior



Impact

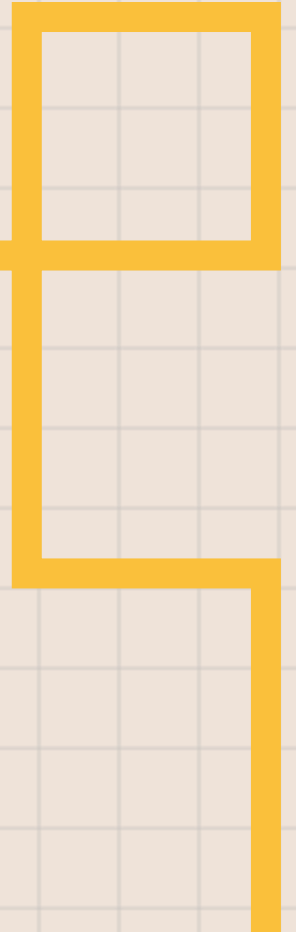
Then, check for the employee's perspective

- Consider the employee's point of view to ensure you're not missing anything
- Use open-ended coaching questions

And clarify next steps

- Help employees build upon successes and reinforce positive behaviors
- Clarify expectations for any needed change

Tips for Feedback



Try *this* instead of *this*...

- *“Here’s my reaction. . .”*



- “Can I give you some feedback?”

- *“Here’s what really worked for me about it. . .”*



- “Great job!”

- *“Here’s where you started to lose me. . .”*



- “You need to improve your communication skills.”

- *“When you did X, I felt Y.”*



- “That was the wrong approach because...”



Feedback Pointers

- Praise in public, corrective feedback in private
- Ratio of positive to corrective feedback
- Avoid the feedback sandwich!!!



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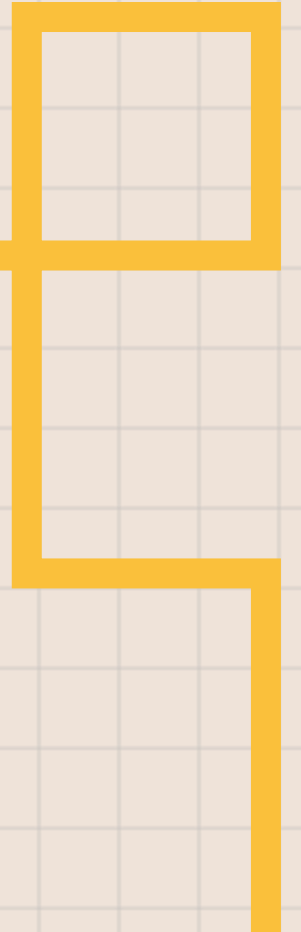
“If you truly embrace a growth mindset, you never have to have a difficult conversation. You’re just having a series of conversations and you’re doing them in a way that is authentic and humanistic and growth oriented. You never get to the point where you’re so frustrated that it’s a difficult conversation.”

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- Quote from a NeuroLeadership Institute *Growth Mindset Culture* study participant



How Mineral Can Help





Dedicated HR Expert

Power of Mineral HR Experts, led by Dedicated Guides who understand your business

- Compliance audit and plan of action
- Guidance through HR and compliance
- Quarterly review for long-term partnership
- Support from foundational to strategic HR and compliance



Guided HR Compliance

Manage complex challenges with confidence.



Dedicated HR Expert

Work with a dedicated Mineral Expert who understands your business, needs and goals for successful HR and compliance.



Smart Employee Handbook Plus

Create and maintain federal and multi-state employee handbook including e-signatures and Spanish translation.



Workplace Harassment Prevention

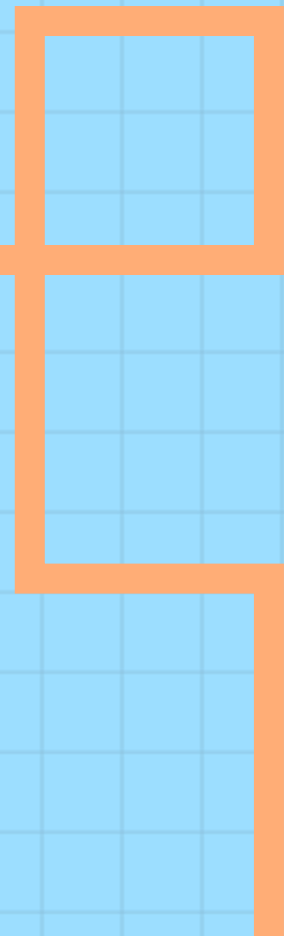
Assign and track interactive courses aligned to state mandates and best practices - including DE&I training.



Poll Question

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Q+A





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