Discussion

What challenges are you concerned with doing a virtual performance evaluation?
Preparation is key...

- **Scheduling the Meeting** – plan a time that provides the least amount of disruption
- **Have a Backup Option** – video conferencing is best because it provides visual cues
- **Documents** – have documents available to share electronically on the screen
Goal Setting

WIGS AND SMART GOALS
Wildly Important Goals (WIG)

A goal that makes all the difference. Failure to achieve this goal renders any other achievements secondary.

- No more than 1 to 3 WIGs at the same time
- A WIG must have a finish lie (from X to Y by When)
X to Y by When

“X”
The starting value for the WIG

“Y”
The ending value for the WIG

“By When”
The date by which the WIG must be achieved
Another way to look at SMART

From X to Y by When

Increase our customer satisfaction score from 45 to 65 by December 31.
## From WIG to SMART Goal

<table>
<thead>
<tr>
<th>S</th>
<th>Specific</th>
<th>What will be accomplished? What actions will you take?</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>Measurable</td>
<td>What data will measure the goal? (How much? How well?)</td>
</tr>
<tr>
<td>A</td>
<td>Achievable/Actionable</td>
<td>Is the goal doable? Do you have the necessary skills and resources?</td>
</tr>
<tr>
<td>R</td>
<td>Relevant/Realistic</td>
<td>How does the goal align with broader goals? Why is the result important?</td>
</tr>
<tr>
<td>T</td>
<td>Time-Bound</td>
<td>What is the time frame for accomplishing the goal?</td>
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Making soft skills specific/measurable

To make soft (competency-based) SMART goals more specific and measurable, follow these four steps:

1. Add context
2. Consider the desired state
3. Identify success measures
4. Identify data points to capture the success measures
Soft Skill Example: Communication

Step 1: Provide Context
- Provide coaching to direct reports

Step 2: Determine Desired State
- Provide coaching to direct reports so they are able to independently resolve technical issues quickly and correctly

Step 3: Identify Success Measures
- How will you know you’ve achieved the desired state?
  - Direct reports indicate they felt supported and coached during difficult situations
  - Successful resolution of difficult issues by direct reports
  - Reduction in number of complaints/delays/returns/whatever your negative metric is
## Soft Skill Example: Communication

### Step 4: Identify Data Points

<table>
<thead>
<tr>
<th>Success Measure</th>
<th>Data Point</th>
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<tr>
<td>Direct reports indicate they felt supported and coached during difficult situations</td>
<td>Ask direct reports if this was achieved through a feedback survey or individually</td>
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<tr>
<td>Successful resolution of difficult issues by direct reports</td>
<td>Track difficult issues encountered by direct reports and what you did to support / coach them</td>
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<tr>
<td>Reduction in number of complaints / delays / returns / whatever your negative metric is</td>
<td>Set a target number to aim for and track the data point identified</td>
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Action Planning and Tracking

Action Plan
- After creating your SMART goal, you will now want to create an action plan
- Things to consider
  - Who, What, When
  - Resources
  - Contingency Plan

Tracking
- Track Progress
- Prepare for Next Steps
- Celebrate Successes – Small, Large, Individual and Team
Preparing for the Discussion

FEEDBACKING AND THE DISCUSSION
Preparing for the discussion

- Review the *Discussion Planner*
  - Who, what, how
  - Opportunities and challenges
  - Key principles
  - Interaction guidelines
    » Ongoing observation, feedback and support

- After the discussion
  - Reflect on the discussion
A customer came into your office today looking upset.

You gave her the forms she needed and explained how to fill them out.

She thanked you for your help and left looking relieved.
A customer complained to me about the service he received from your office.

A: Before he could finish, you interrupted him and said there was nothing you could do.

R: He left looking really upset.

A: It might have helped if you had reviewed the circumstances with him, explained why he could not get what he wanted from your office and referred him to the appropriate office.

R: That way, he would have better understood our regulations and felt better about the interaction.
Tips for Conducting Effective Virtual Performance Evaluations

Pay close attention to expressions and body language when using video tools:

- Nonverbal cues count – yours and your staff
- Be aware of subtle visual cues that you give and receive
- Remember to project openness
- 55% of all communication is body language
Tips for Conducting Effective Virtual Performance Evaluations

Be an active listener:

- Active listening cultivates trust and respect
- Having some silence allows time for responses or assimilating thoughts
- Give them time to explain their biggest wins or challenges without interjection
- Take note of the words they are using
Tips for Conducting and Effective Virtual Performance Evaluation

Strike a balance between how to clearly get your message across and understand how it will be best received:

- Allow time for small talk
- Be appropriately direct
- Speak compassionately
- Always solicit feedback
Working Group Session

We will use this time to:

- Answer individual questions on goals you are looking to write
- As a group, help each other with our goals
Discussion Questions