

# Mapping, Managing and Improving Staff performance in Access Services

## Presentation Outline

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- I. Who am I, what do I do
- II. What I'm going to cover
  - a. Getting to Good as a starting point
  - b. Helping Staff Improve
- III. Staff Performance: First things first
  - a. You as manager
    - i. Navigator, matching staff needs in terms of motivation and resources with management styles and organizational goals.
    - ii. Encouraging synergies, taking disparate people and making them effective coworkers and teams
    - iii. Not just managing staff, but *their expectations of you and their colleagues* as you negotiate expectations, conflict, communication, differing preferences for feedback, work structure, and input
  - b. Expectations for staff: in perfect world, same expectations for all. Not useful in world of teams and differing personalities and preferences. Performance expectations may be written, but behavior, communication, and other informal expectations may need to be made more clear and individualized as necessary
    - i. Ex – Darlene, communication, smileys & direct emails
  - c. A RECOMMENDATION:
    - i. Service Fluency
    - ii. Mission & Vision (unit level)
      - 1. Gives all of your staff a common vocabulary and set of assumptions about what is important and what is not.
    - iii. What does excellent customer service look like?
      - 1. MEASURABLES
      - 2. TIE BACK TO PERFORMANCE EVAL

- iv. Without this, you are leaving your folks unsupported to make decisions on the front line as they try to provide service.
- v. Allows for buy-in avenue.

#### IV. Prepping for Performance: The initial Conversation

- a. Starting point. Go over: job description, what they like best, what they think needs improvement – for themselves and for unit.
- b. Helps you plan and figure out where the focus needs to be for your staff

#### V. Evaluation and Appraisals/Services/Communication

- a. What you want
- b. What you get
- c. Structured evaluation process (required)
- d. Informal evaluation process (recommended)

#### VI. Planning & Evaluation I

- a. Without a plan, you'll be training your folks piecemeal only as needs become so transparent that you're already behind the ball on service provision.
- b. So: what technologies do you need your staff to be proficient in?
- c. Have you prioritized them so staff are aware of what they should focus on?
- d. How are you keeping these requirements up to date? Job descriptions & performance reviews? Annual unit goal planning?
- e. Needs to be codified, or staff may find that your expectations are unclear and will fail to perform at desired levels

#### VII. Planning & Evaluation II: Measurements and Markers

- a. Without any sort of evaluation, you'll have no idea if the training and tech knowledge has stuck.
  - i. WHAT do you want them to be able to use?
  - ii. WHY do you want them to be able to use it?
  - iii. WHERE & HOW do you expect them to apply this knowledge?
  - iv. HOW will they be held accountable?

#### VIII. Performance problems

- a. Caused by Lack of Knowledge or execution.

- i. Lack of Knowledge easily fixed with training.
- ii. Lack of Execution
  1. Clarify expectations: can they explain what is expected?
  2. Remove obstacles: resources to do the work are available.
  3. Provide feedback: regular, accurate and timely.
    - a. Goes back to evaluation & appraisal, Desired vs actual performance: What do you want, vs what do you get.
  4. Arrange appropriate consequences.
    - a. Generate a consequence list. Not just disciplinary action, but other logical consequences such as:
      - i. Office or cube moved
      - ii. Change in supervision/reporting
      - iii. Change in workflow
  5. Punishment doesn't work!
    - a. Uncertainty
    - b. Inconsistent
    - c. Long term disaster
  6. Performance discussion before disciplinary action (most cases)
    - a. Actual vs Desired performance
    - b. Who, what, when, where, how long & Why
      - i. Get right to the point "There is something that is concerning me and I need to talk to you about it."
      - ii. "I'm dealing with a situ that is troubling me and I need your help to resolve it"
      - iii. SPECIFIC, DETAILED DISCUSSION of issue
      - iv. WHY THERE NEEDS TO BE CHANGE
      - v. Gain agreement from staff member
      - vi. End on positive expectation of change
      - vii. Follow up in writing