



The Frank Review Guide

PRACTICAL STEPS TO IMPROVE THE PERFORMANCE MANAGEMENT PROCESS OF YOUR ORGANISATION

In today's workplace, performance improvement and the role of performance management is an increasingly popular topic.

Why the intense focus on performance management now? Business pressures are ever-increasing and organisations are now required to become even more effective and efficient, execute better on business strategy, and do more with less in order to remain competitive.

Forward thinking companies are taking steps to successfully address this negative view of performance management. They are implementing innovative solutions that ensure processes deliver real results and improve performance.

When someone mentions performance management or reviews at your organization, what is the typical response? Do employees and managers alike cringe? Do they avoid performance management related tasks? Do visions of tracking down incomplete appraisal forms come to mind? **This can be changed.**

The purpose of this guide is **to provide concrete guidelines and practical steps** that can be used to improve the performance management processes at your organisation.

The Performance Review—Only Part of an Ongoing Process

Frequently when performance management is mentioned, people think of the **employee performance appraisal** or review.

Performance management, however, involves so much more. Properly constructed appraisals should represent a summary of an ongoing, year-round dialogue. Focusing only on an annual appraisal form leads to misunderstanding and under appreciation of the benefits of performance management. An effective performance management process enables managers to evaluate and measure individual performance and optimize productivity by:

- **Aligning individual employee's day-to-day actions with strategic business objectives**
- **Providing visibility and clarifying accountability related to performance expectations**
- **Documenting individual performance to support compensation and career planning decisions**
- **Establishing focus for skill development and learning activity choices**
- **Creating documentation for legal purposes, to support decisions and reduce disputes**



8 Ways To Optimise The Performance Review Process

1 SET GOALS EFFECTIVELY Goals are the basis of an effective process. There are two key elements to consider when developing goals. First, **are goals written clearly and objectively?** Second, **are they directly contributing to the achievement of business strategy?**

2 BEGIN WITH PERFORMANCE MANAGEMENT

Using established goals as a basis, performance planning sets the stage for the year by communicating objectives, and setting an actionable plan to guide the employee to successfully achieve goals.

Performance planning, as with all other steps, is **a collaborative process between the manager and employee**, although there will always be some elements that are non-negotiable. Begin with **the job description and identify major job expectations**; expectations then can be clarified for each major area.

3 ENSURE AN ONGOING PROCESS As the following diagram illustrates, **goal setting, performance planning, performance monitoring, feedback and coaching** is ongoing and supports the creation of the performance appraisal, which in turn supports processes related to rewards, learning and development. **Performance monitoring, feedback and coaching** creates a separate feedback loop within the larger loop which should take place more often, allowing for necessary adjustments to performance planning as conditions dictate.

4 IMPROVE PRODUCTIVITY THROUGH BETTER GOAL MANAGEMENT Regular goal tracking allows for the opportunity **to provide feedback as needed, make adjustments to performance plans, tackle obstacles and prepare contingencies for missed deadlines**. Without a mechanism to regularly track progress against goals, the ongoing, cyclical nature of the process falls apart.

5 GATHER INFORMATION FROM A NUMBER OF SOURCES This information should include objective data like **sales reports, call records or deadline reports**. Other valuable information

includes: feedback from others, results of personal observation, documentation of ongoing dialogue, records of any external or environmental factors impacting performance.



6 DOCUMENT, DOCUMENT, DOCUMENT Note taking must be consistent and include all significant occurrences, positive or negative. **Documentation is important to support performance decisions**, and notes should be written with the intent to share. In addition to documenting the details of an occurrence, any subsequent follow up should be detailed.

7 ADEQUATELY PREPARE AND TRAIN YOUR MANAGERS Managing the performance of another individual is not an easy task and requires many skills. Training may be required to **ensure managers feel adequately prepared** to effectively complete all the tasks related to performance management. This is especially the case for newly promoted supervisors. **Managers need to understand human behavior, how to motivate, how to develop, provide coaching and deal with conflict.**

8 THE REVIEW The employee performance appraisal or review should be **a summary of all that has been discussed**. Based upon job expectations and key areas of contribution, and previously discussed goals and evaluation methods, the appraisal should be a written confirmation of what has already been discussed with the employee.



The Frank Review

WHAT IS IT?

A Frank Review **identifies the barriers** that prevent you from achieving what you want to achieve, **creates a clear action plan** to remove these barriers and **quantifies the commercial value** of removing these barriers.

HOW IS IT DONE?

We conduct Frank Reviews at three levels: Teams, Business Functions and Businesses. It helps us to understand which one of the Frank Boys products is right for you and establish the level of opportunity.

WHAT ARE THE BENEFITS?

- Fast, thorough, hands-on review of your business Processes, People, Policies and Systems
- Allows you as CEO/ Director/ Team Manager to pinpoint where you should focus your efforts to maximise benefit
- The assessment is against our unique best practice Frank Profitable Architectures model
- You get a Powerful Improvement Plan to help you take your business forward.



WHY DO YOU NEED IT?

- Get a clear prioritised improvement plan
- Identify (typical) productivity opportunities of between 10% and 40%
- Find out how to improve profit, service levels, quality
- Assessment against our proven best practice models
- Assessment of processes, systems and your staff
- Benchmark performance
- Understand the commercial impact of the opportunities

The Frank Boys *Consult Differently*

ABOUT US

The Frank Boys are enablers of business transformation. We help organisations reach their potential by shaping and enabling visions, calming chaos, creating profitable architectures and healing cultural wounds.

We have over 30 years' combined experience of transforming organisations into profitable, healthy businesses. Our vision is to make work a better place for all.

We decided to form The Frank Boys out of an incredible desire to bring a fresh, positive approach to consultancy. Leaving secure and long standing jobs we have shaped our business to offer a refreshing change to old-paradigm consultancies which enforce and impose solutions. We empower, coach and support individuals and teams to deliver tangible commercial value.

Our company name was given to us by our clients. Before The Frank Boys became our formal company name our clients called us "the frank boys" out of affection, respect for our work, and the frank, open and honest discussions that they have had with us.

We are approachable, loyal people and love what we do for you, our clients. We believe our approach works: In the last 2 years alone we have created benefits for our clients in excess of £51m.

To improve your organisation's performance management and **obtain a Frank Review to understand which of our products is right for you**, call us on 0844 2730147 or email us at info@thefrankboys.com

