

Beyond the Horizons Consulting

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Therapy for Business®

Have you ever wondered why some organizations function so well, while others seem to have nothing but logjams? — Leaders need to have vision which they communicate clearly to their employees. Leaders also need to engage their workers emotionally in the tasks at hand. Sometimes an organization needs a little therapy!

Our March Newsletter begins our in-depth examination of methods of performance appraisal by giving you the two hallmarks of every good appraisal tool. In April we continue by listing a variety of assessment devices. [The article begins on page 2 of the Newsletter.](#)



Beyond the Horizons Consulting offers a variety of services for individuals, teams, and organizations.

- ◆ Individual coaching for managers is a process that begins by identifying your style, what you want to retain and strengthen, and what you want to modify. Objective assessments are part of the process, as are also a mutual give-and-take process of creative problem solving and supportive guidance.
- ◆ We offer group seminars on identifying and dealing with stress in a relaxing and supportive

environment.

- ◆ Our team building seminars will help your team or department run more smoothly, whether it is a brand-new team or one that has been put together after a reorganization.
- ◆ Our communication seminars identify crucial parts of the communication equation and help you put them all together by using role play, among other practical, hands-on experiences.
- ◆ Critical Incident Stress Debriefing (CISD) is a special tool we are equipped to provide to your business whenever there is a traumatic incident — death of a coworker, robbery, layoffs, etc. — in the workplace.
- ◆ We also offer group seminars utilizing excellent tools, including the Myers-Briggs Type Indicator or the DISC, to help you see *in black-and-white* differences in personality type and behavior.
- ◆ Our conflict resolution services help opposing parties identify mutual purpose(s) and restore harmony to the workplace.
- ◆ It is our pleasure to tailor a seminar to your company's, department's, or team's needs!

Our serene, off-site location appears featured in our May and June 2005 Newsletters.

Call us to schedule a complimentary consultation for yourself or your business!

Our helpful Office Administrator, Stan, will work with you to schedule a meeting time that fits your schedule.

Stan and Jean Eva can be reached at (505) 466-4990, or on-line at info@beyondthehorizonsconsulting.com.

Methods of Performance Appraisal

In order to measure anything fairly, all assessments must pass two tests:

- 1 Is this assessment valid? That is, does it really measure what it purports to measure?
- 2 Is this assessment reliable? That is, are its results consistent over time?

Two brief examples: If you want to measure the *quality* versus the *quantity* of customer service calls, you will have two very different instruments. The *quality assessment* will rate an employee on a number of variables that have **already been proven** to be important factors leading to customer satisfaction. On the other hand, the *quantity assessment* will be a simple tally of the number of calls each customer representative has received — not *how* s/he has handled the questions and requests, and not whether the call has resolved the customer's issues.

SOME GENERAL PRECAUTIONS

A successful performance review can enhance company performance in a number of ways. However, there are also some cautions to be heeded in the process:

- ◆ Across-the-board performance reviews help dispel the myth that persons are promoted solely on the basis of seniority. *If* seniority really does equate with job experience, that should certainly be taken into consideration in giving a promotion. However, performance excellence also needs to be rewarded.
- ◆ If proper progressive discipline is being applied, managers will need to show “just cause” in order to terminate an employee. The data contained in the performance review will be important evidence.
- ◆ Performance reviews needed to be handled with utmost confidentiality. The copy which goes into the employee's file must be kept under lock and key to prevent unauthorized personnel from obtaining information which they can skew and use to disastrous effect by spreading rumors.
- ◆ Managers should take care not to include in their reviews any “florid” information that could mislead future employers about the skills or abilities of employees.
- ◆ Just as important, managers should never put in writing anything that might be construed as defamation of character.
- ◆ Managers should conduct formal reviews in a timely fashion, using measures that are both valid and reliable

- ◆ They should also have available a log of any data they will need to substantiate their claims.
- ◆ The manager who does the review should not be the person who makes the final decision on salary increase. Power needs to be shared so that there will be less subjectivity, and the employee will experience “a fair shake.”
- ◆ As our economy continues to move toward the information technology and service sectors, objective rating systems become more difficult to devise. If instead we were looking at the manufacturing sector, where production line statistics would be fairly easy to measure, job retention and promotion decisions would be rather “cut and dried.”



SOURCES OF PERFORMANCE RATINGS

On the simplest level, we might consider the following objective data by which to rate an employee's performance:

- ◆ Output or production data
- ◆ Number of absences
- ◆ Number of times the employee has been late to work
- ◆ Number of work accidents the employee has been involved in

With the growing number of customer service type jobs, we are forced to look at more subjective data and to use various tools such as graphs, forced distributions, and rank ordering.

In our April Newsletter we will introduce you to five different sources of rating scales. We believe they will give you food for thought as you review your current methods of employee performance appraisal.