

Achieving the LOOK & SOUND of LEADERSHIP

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EXECUTIVE COACHING TIPS



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Performance Reviews ▶ 12/01/11

Reviewer, calm thyself

Throughout our coaching, Teri had been asking for help managing Ken. She experienced him as defensive and emotional. Now she had to deliver his year-end review—an event she found awkward even with the easiest of her direct reports.

Teri showed me the draft she'd written for Ken's review. There were two sections. The first section asked the boss and the employee for a ranking (Exceeds Expectations, Meets Expectations, etc.) on six competencies. The second section asked for written comments from the boss and employee on "Strengths" and "Areas for Development."

In the ranking section, Teri had given Ken "Meets Expectations" in all six categories. Ken had done the same for himself except in one category, "Driving for Results," where his self-ranking was "Exceeds." I started with that.

"This isn't a huge gap but I'm sure he'll want to talk about it. How will you explain the disparity to him?" I asked.

"Well, he just doesn't get results," she told me. "At least not on his own. He's always coming to me and asking me to solve his problems for him."

"Always?" I asked. "Surely not."

"Yeah," she said, "that's what it feels like."

I signaled "time out" with my hands and smiled at her.

"Teri, when you give your reviews, I want you to be as clear-headed and calm as possible—especially when you're dealing with someone like Ken who might be swamped by his own emotions. Words like 'always' and 'never' are a red flag that you're assessing his performance emotionally, not factually."

I went on to explain that “always” and its twin, “never,” are rarely accurate. Someone like Ken can argue, with some validity, that he doesn’t “always” ask Teri to solve his problems. And he’d have a point. These semantic arguments allow the person to win a small victory while avoiding the bigger message.

Lesson number one for Teri: Be sure your assessments are based on facts, not feelings.

Each ranking should have specific criteria

We returned to the disparity between Teri’s “Meets Expectations” ranking versus Ken’s “Exceeds Expectations.”

“I think it’s important, Teri, that you’re able to clearly explain to Ken the difference in your mind between ‘Meets Expectations’ and ‘Exceeds Expectations’.”

I talk about this often with managers and use a high school teacher of mine as an example. When she assigned us a complex term paper that would take up most of our semester, she showed us three sample papers. One had gotten an “A,” one a “C,” and one an “F.” She explained the differences and how she’d graded each one.

I feel managers should do this for their direct reports. How does “Exceeds Expectations” look different from “Meets Expectations?” And how does “Meets” look different from “Needs Improvement?”

Teri said quietly, “Wow, I have some serious homework to do!”

Teri’s second lesson: Describe the behaviors that achieve each ranking. Then apply those descriptors equally and consistently to everyone.

Be specific and behavioral

We had arrived at the narrative section. She’d written quite a bit. I focused on two sentences. The first, under “Strengths,” was this: “At the beginning of the year, Ken had real trouble treating his direct reports respectfully, but after several serious discussions, I noticed some improvement.”

The second sentence, under “Areas for Development,” was this: “Ken needs to be a more effective leader of projects and teams.”

I said, "I have one concern that's common to both these sentences, and then one way I think each can improve. Can I start with my concern?" She said yes.

"My concern about both these sentences is that they aren't very specific. If I were your direct report and read those sentences, I wouldn't know specifically what I should keep doing or stop doing or start doing in order to get a better review next year."

I wanted Teri to identify the respectful behaviors Ken had begun to display so he could keep doing them. And I wanted her to identify what behaviors she thought would make him a more effective project and team leader.

Teri's third lesson: Name specific behaviors that someone should start or stop or continue.

Identify strengths enthusiastically

Then I tackled how she could improve each sentence.

The first sentence had said this: "At the beginning of the year, Ken had real trouble treating his direct reports respectfully, but after several serious discussions, I noticed some improvement."

I applauded Teri for identifying how Ken had improved during the year. Recognizing development in a performance review is important, especially when it ties back to a previously-discussed issue.

However I challenged Teri because, as written, her recognition of Ken's growth felt more like criticism. This "Strengths" section was designed to acknowledge what is going well, not an invitation to echo issues from the "Development" section. I was concerned Teri's personal filters were clouding her perspective.

Most importantly, though, I wanted Teri to write a real acknowledgment of Ken's strengths as an employee; that's different from noting how he'd improved. I wasn't sure Teri was putting aside her upset with Ken to be able to articulate his strengths objectively.

Strengths, to me, have three qualities: First, they are things we do naturally, without a lot of conscious effort. Second, they are things we do well. Third, they usually have a positive impact on people.

Emphasizing and acknowledging your direct reports' strengths is vitally important. When you identify strengths clearly, you get two benefits. First, their strengths become stronger; what they're doing well



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gets even better. Second, they feel better about their work. Gallup research says that when managers focus on the strengths of their direct reports, 99% of those workers report feeling engaged on the job. *Ninety-nine percent!* That's quite a pay-off!

Teri's fourth lesson: Identify strengths unequivocally—even with challenging direct reports.

Identify development areas in detail

In "Areas for Development," Teri had written: "Ken needs to be a more effective leader of projects and teams."

I thought this sentence could improve by becoming two sentences. Whatever Teri wants him to start doing to become an effective leader of projects is most likely quite different from what she wants him to start doing to be a good leader of teams.

I find managers often write complex sentences in the "development" section because they're uncomfortable having a conversation about development at all.

But lumping two or three separate ideas into one sentence is confusing and unhelpful for the employee.

Teri's fifth lesson: Write one specific issue per sentence.

Cardinal rule: No surprises!

Finally, I asked Teri the key question that I ask all managers at review time: "Do you think Ken knows what you're going to tell him and how you're going to rank him?"

Yearly performance reviews came into being because so many managers never gave any feedback to their direct reports at all. Now, many workers only hear about their performance when a review is mandated.

But, really, how can workers improve their performance if they only get feedback once a year?

To me, it would be like trying to increase your body strength by having one conversation with a trainer in the parking lot outside the gym, then going inside and trying to figure out a regimen all by yourself. You might be successful, but it sure would be easier if your trainer would teach you what to do and then check in with you now and then!



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Teri's sixth and final lesson: Give feedback (about strengths AND development) in little dollops all year long. When you deliver a review to your direct reports, nothing you say should be new or surprising.

Resources for giving feedback

Over the years I've written extensively about giving feedback and handling difficult conversations with direct reports. Links to some of those Executive Coaching Tips are below. For the full list, go to the [Coaching Tips archive](#) and select "Feedback" from the dropdown menu on the left.

Implementing even a few of the ideas from this Tip and those others, will help your year-end reviews have *The Look & Sound of Leadership*™.

Read related Tips:

[Dealing with Emotional Responses](#)

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