

TEAM PROFILER: PERR 360 (Performance Review)

Company: Acme Company
Team: Sales Department
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Introduction to the PERR 360

In the individual version of the 360 report, participants received a detailed interpretation of their performance in 31 different areas, based on the appraisal of their raters, along with practical advice to help them improve specific skills and nurture particular traits.

In this team version of the 360 report, the ratings of all your participants are consolidated into one report. This allows you to view the performance of your team as a whole, discover which factors of your team's work approach require improvement, and target training initiatives for these particular areas. To help you with this initiative, we have included some tips and exercises that you can share with your team.

Detailed Results

How to read the report: Each skill and trait your team was rated on will be shown on a scale from 0 to 100. The higher the score, the better your team is performing in this area.

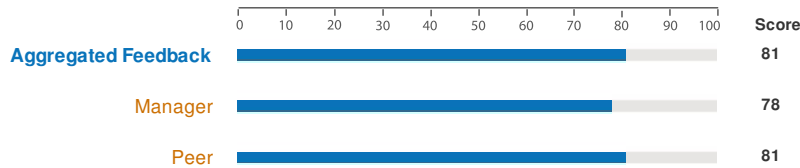
WORK ETHIC

Work ethic plays a major role in the manner in which a person completes tasks and otherwise conducts himself or herself in the work environment. Employees who have a good work ethic are committed to doing their work well, and will put in the necessary time and effort to get tasks done properly.

The following is a breakdown of the Work Ethic scale, and how your team has been rated:

Diligence

Ability to complete tasks thoroughly and conscientiously.



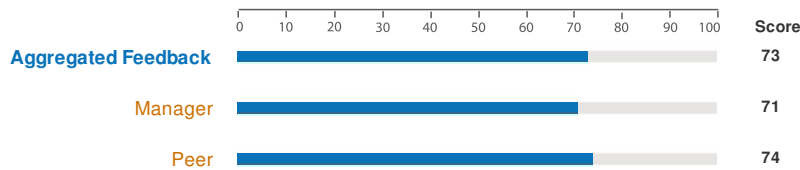
This is a diligent team that endeavors to make sure that every task and project they take on is completed carefully and thoroughly; a careless or half-hearted effort is out of the question. Getting tasks done quickly may be important, but so is completing them well, which is what this team is dedicated to doing every day.

Here are some tips to help your team:

- Work with your team to create guidelines to improve work quality.** This can include outlining proper procedures on how tasks should be done, what to look for when double-checking work, or perhaps even having more than one reviewer to sign off on a task before it's considered complete. As tedious as being diligent might be, spending more time making sure a task is done well means less time wasted correcting preventable mistakes (and less regret).
- Communicate the importance of attention to detail.** When managing projects, omitting or ignoring details can be costly. Encourage employees to keep track of their progress on a task, loose ends to be tied up, bugs they run into, the amount of time and resources they use up, etc. This information can prove useful for future projects.
- Don't fix errors made by others.** In a non-threatening way, show the person who made the error what they did wrong, why it's wrong, and how to prevent it from happening again. Most importantly, create an atmosphere where pointing out errors is not perceived as threatening or admonishing – mistakes and failures are part of the learning process.
- Make time for quality control.** When creating a project plan, incorporate buffer times to give employees enough time to check over their work and tie loose ends, and account for potential mishaps that may occur. Also, make sure to have regular progress meetings to determine where a project stands. This way, if an employee is behind schedule or struggling with some aspect of the project, steps can be taken immediately to resolve the issue.

Dedication to self-improvement

Degree to which a person strives to advance his/her skills and ameliorate his/her performance.



This team rarely settles for their current level of performance and more often than not, will try to outdo previous accomplishments. They believe, or at least understand, that it's important to push themselves to do better, especially when they don't perform as well as expected. This dedication to self-improvement likely gives them the motivational boost they need to reach their full potential.

Here are some tips to help your team:

Give employees the tools they need to succeed.

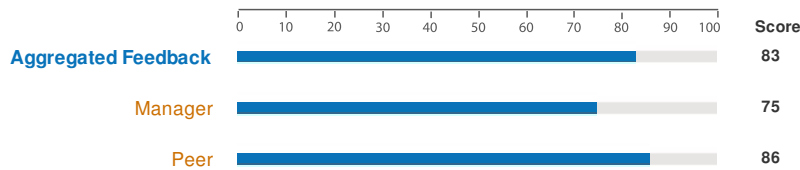
It's not enough to conduct performance evaluations and point out what's going right and what needs improvement. You need to give employees the resources they will require to bring their skills up to the level where they need to be. This can include:

- Training and re-training programs at regular intervals (on a yearly or bi-yearly basis)
- A coaching or mentoring program
- Workshops
- Conferences
- Online tutorials
- Education courses at local schools
- Cross-training or lateral moves in the company, where employees can learn about what goes on in other departments and pick up new skills (e.g. creating a financial report, basic programming)

While this might seem like a major expense, the Return on Investment (ROI) will be worth it.

Attendance

Degree to which a person is punctual and consistently shows up for work.



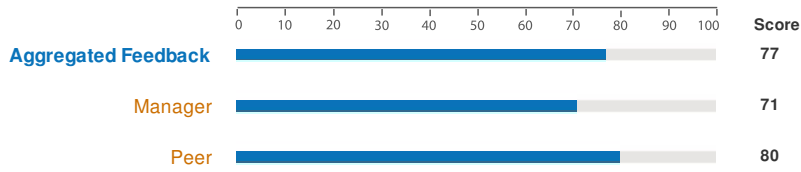
Attendance doesn't appear to be a problem for this team. Members of this group strive to be punctual as often as possible. They recognize that time is a valuable resource and that a lack of punctuality is a lack of respect for others and for the company.

Here are some tips to help your team:

- Clearly communicate rules regarding attendance.** Some of these rules might include calling in as soon as possible if a person is running late (so that sufficient warning can be given if a meeting needs to be postponed or a temporary replacement needs to be found), and clearly outlining preferred hours/days for planned absences (medical appointments, vacation, pedagogical days for kids). If the company has flextime shifts, clarify which hours and days people must work (i.e. black-out days), and which hours/days can be used for personal appointments.
- Be a good role model.** If you regularly come in late for work, arrive after a meeting is supposed to start, take longer lunches, or take days off without giving your team a heads-up, punishing employees for engaging in the same conduct is dishonest and highly unprofessional. Remember, you can't hide behind your title - being a manager means following the rules that **you** have put into place. Otherwise, you're just giving employees an excuse to break the rules themselves, quit, or perhaps even go above your head and file a complaint.
- Be fair, within reason.** If there's bad weather, traffic is horrible, and one of your employees has to take three buses to get to work, be more understanding if he or she is late on occasion. Or if an employee is always willing to stay late or almost always arrives early, there is no need to jump down the person's throat if he or she is tardy. However, if a lack of punctuality becomes a regular habit and the employee always seems to have an excuse, point out the issue and suggest that the employee find ways to get to work on time or he/she will need to be reprimanded accordingly. At the same time, make sure to regularly praise good attendance.
- Start meetings on time.** While most people adopt the "wait 15 minutes rule," don't be too lenient when it comes to attendance at important meetings. Tolerating tardiness under these circumstances wastes everyone's time.

Integrity

Degree to which a person follows rules, and otherwise displays honesty and integrity at work.



Integrity seems to be fairly important to this team, or at least most members of the team. This means that more often than not, they will take the time to think through their actions before doing something that could be considered unprofessional. Members of this group recognize that there are consequences to their behavior and want to avoid doing something they will regret. The threat of the consequences of rule-breaking or unscrupulous behavior motivates them to behave with integrity, but it can occasionally be difficult for some of them to subdue the temptation to behave dishonestly.

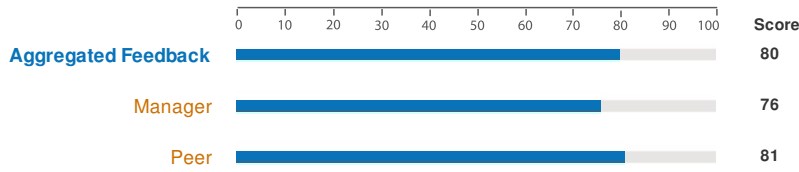
Here are some tips to help your team:

Use positive reinforcement to encourage proper conduct.

Rather than simply punishing employees for unprofessional behavior (like rule-breaking), start rewarding them for their truthfulness and integrity. When an employee takes responsibility for a serious mistake, voluntarily does overtime to complete a project, or goes out of his/her way to make sure a task is completed well even though his/her work won't be checked, make sure to let the employee know that you recognize and appreciate his or her effort. Praise for good behavior is more likely to encourage integrity than punishment for bad behavior.

Accountability

Degree to which a person is willing to take responsibility for his/her actions and performance.



This is a team that places the outcome of their actions squarely on their own shoulders. They seldom make excuses for their failings or errors in judgment, and are willing to take the steps necessary to improve or make amends. Members of this team do not shy away from responsibility.

Here is an exercise to help improve your team’s accountability:

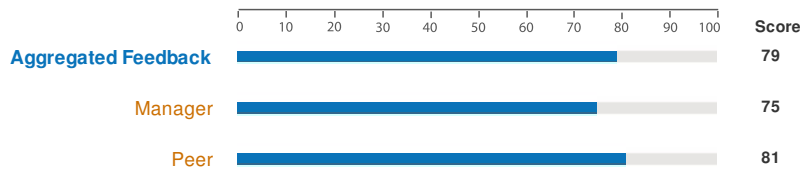
Exercise: I am committed

Come up with three things that you will commit to improving. Try to be specific. For example, “I am committed to improving the amount of time I take to scope out a project.” After naming three areas that you will commit to improving, come up with at least one or two ideas on how you will do so. Can you take courses? Ask a colleague to mentor you? Find tutorials online?

I am committed to improving my...	I will do this by...
1)	
2)	
3)	

Productivity

Degree to which a person is steadfast, and puts in a consistent and dedicated work effort.



While this team has the capacity to be more productive, they still manage to get quite a bit of work done. For the most part, they can be trusted to put in a dedicated and productive effort on a daily basis, but there might be one or two members who could apply more of an effort. Perhaps with the right incentive, this team's level of productivity could improve further.

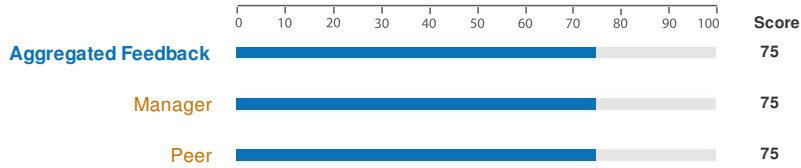
Here are some tips to help your team:

Encourage your team to take regular breaks.

When we have a lot of work to get done, our initial response might be to get started early and to keep going until the end of the day. While it seems rather counter-intuitive, taking breaks at regular intervals (e.g. every 2 to 3 hours) can actually increase productivity, particularly when employees are working on mentally demanding tasks. Research has shown that taking a break not only refreshes the mind, it also provides you with an opportunity to think through what you've done so far, and perhaps create a better plan on how to approach your next shift. The point is, there is only so much information your brain can handle before it starts to lose focus. Regular breaks can give your team the mental boost they need to keep up a steadfast and focused work pace every day, all day.

Quality of Work

Degree to which a person can be counted on to produce work that is up to performance standards.



This team has a clear desire to do well and to produce quality work. Whether all members are able to do so on a regular basis might still be an issue of contention. It is unlikely that someone on this team would intentionally put in a substandard performance, but it might be a good idea to implement measures to ensure that standards of quality are clear to everyone - and met, every time.

Here are some tips to help your team:

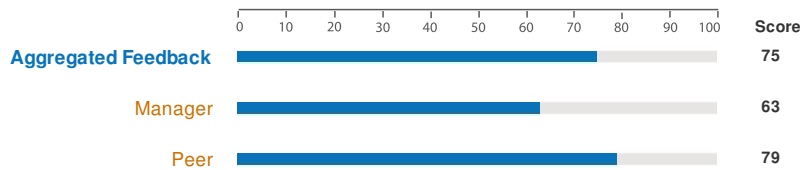
Set the standards for quality work.

If there are certain standards that you want your team to live up to, it's important to make them crystal clear. Create checklists for standard tasks and projects that cover everything that needs to be done before an assignment can be declared as finished.

It would also be helpful to create a "how-to" directory that offers clear, step-by-step instructions on how to complete specific tasks - you can ask your team to add their individual tasks to this "how to" directory as well. This way, any employee can take over the duties of a sick colleague, and new employees can have quick access to information should they require it.

Results Orientation

Ability to follow through on projects until completion.



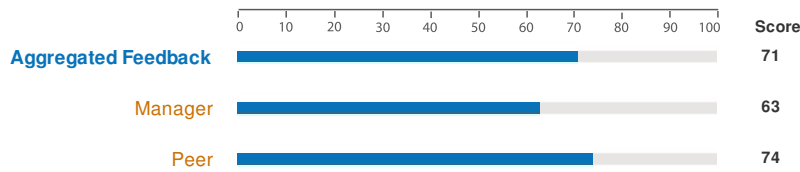
When a team has a strong results orientation, putting time and effort into a project without seeing it through to completion would be a very frustrating and unfortunate outcome. This is why they refuse to give up on a project or on themselves. Once they take on an assignment, they will plod ahead until they complete it, no matter what obstacles they run into.

Here are some tips to help your team:

- Encourage ownership of projects.** Ask employees of all levels who are involved with a project for their feedback - and take it into account. Involve them in the planning of the project; for example, don't just create time estimates arbitrarily; ask the people concerned how long they think their part will take. When people are involved in the decision-making process they're more likely to want to take responsibility and do a good job.
- Ensure proper project management.** Projects should be carefully outlined with clearly specified deliverables, deadlines, and communication procedures in case things go awry. Also, make sure to build in buffer zones for unexpected delays or changes. Most importantly, confirm that your team has the time to do the project and that it fits within their schedule. If a project is really important, you have to scale back on something else, so prioritize carefully.
- Clarify the scope of the project from the beginning.** And make sure to stick to it as much as possible. While projects will sometimes require tweaks if bugs or issues are found, it gets really frustrating for the team when the specs of a project keep changing. Ensure that what needs to be done by a target date gets done by that time, and don't keep changing the targets on people.
- Do a project kick-off and wrap-up.** When starting a new project, organize a meeting to discuss what the project entails and what everyone's role is. When the project is done, organize another meeting to determine what went wrong, what went right, and what you learned from this project that should be adopted in the future.
- Be careful when scrapping work.** If a project doesn't work out, whether it's the result of external circumstances (lack of resources, client backs out) or internal circumstances (poor planning), don't leave employees hanging, especially if they just spent the last month working on it nonstop. Communicate the reasons why it didn't work out and salvage what you can for future projects.
- Create contingency plans.** If your team is hit by a flu bug you can't stop production until these key members come back. Have a plan ready for substitutions. For example, make sure that multiple people are trained to take care of certain crucial tasks so that if someone has an unexpected leave of absence, another employee can take over. This way, productivity will not be affected.
- Praise result-oriented efforts.** If an employee came up with a more efficient way to complete a task or your team delivered a project earlier than expected, celebrate and praise their successes. If they know their hard work is appreciated they're more likely to keep it up.

Resourcefulness

Ability to resolve problems and adapt to new situations with ease.



Res 3

This team has shown that they can be resourceful. When confronted with a problem or an unexpected obstacle, they will usually manage to find a way to adapt and adjust their tactics accordingly. To further improve their resourcefulness, this group needs to keep in mind that an important aspect of ingenuity is knowing where to find useful information, and the ability to come up with creative and innovative solutions.

Here is an exercise to increase your team's resourcefulness:

Exercise: One small step at a time

A problem can seem all-the-more overwhelming when we look at it as one big task (and this is the point where a lot of people opt for the quickest and fastest solution). If your team is faced with a problem, encourage them to break it down step-by-step:

Step 1: Determine what the main issue is that needs to be resolved.

Step 2: Determine what your goal is. It should be more than just solving the problem - make the situation better in order to prevent this problem from coming up again in the future.

Step 3: Conduct research and/or consult with subject matter experts

Step 4: Brainstorm solutions with a group.

Step 5: Plan how the solution will be implemented and the resources you will need.

Step 6: Implement the solution.

Step 7: Follow-up. What improvements have you noticed? What may need to be revised?

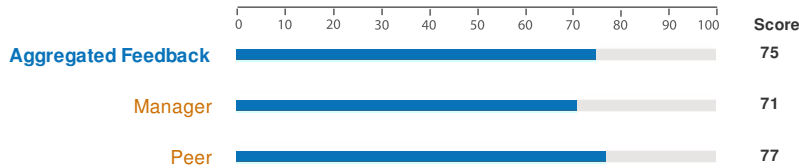
WORK ATTITUDES

An employee’s attitude toward his/her work – how he/she feels about projects, colleagues, management – can have a direct impact on his/her conduct on the job. For example, employees who are not stimulated by the projects they are assigned might find themselves feeling less engaged and as a result, will put in less of an effort to get a project done well.

The following is a breakdown of the Work Attitudes scale, and how your team has been rated:

Engagement

Degree to which a person is interested in and committed to his/her work.



This team’s level of engagement is reasonably high, but there is still room for improvement. There are certain issues that management will need to examine in order to boost employee engagement and help them regain a sense of enthusiasm for their work. Fortunately, you have a good platform to start from: For the most part, team members are invested in their work and want to do their best. They may not fully identify with the company’s goals and approach, but there is a clear desire to succeed.

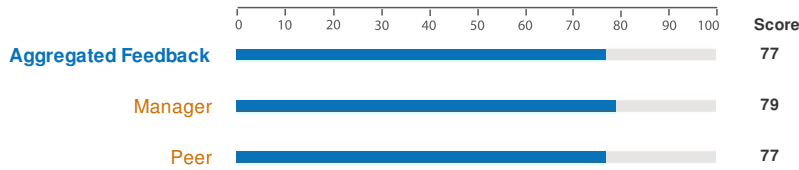
Here are some tips to help your team:

Get to know your staff better.

While you are not expected to become friends with your staff, getting to know them on a semi-personal level can improve the way you connect to them. Demonstrate to employees that you don’t just see them as another face in the organization, or as a means to a profitable end – show them that you recognize that they are human beings with a life outside of work. Without getting too personal, ask employees questions about their family, their hobbies, or their favorite sports. The benefit of this is two-fold: Your employees will see you as more than just a boss, and recognize that you care about their wellbeing, and you’ll be creating a better relationship with your team. If they see you as an ally, they may think twice about acting dishonestly.

Proactiveness/Initiative

Degree to which a person is comfortable being autonomous and taking action on his/her own.



Some people go the extra mile and others just do the bare minimum to get by at work. Members of this team generally fall into the former camp. More often than not, they are comfortable taking initiative – and would likely feel more empowered to do so with management’s encouragement. Having a self-governing team that is willing to be proactive is an asset to the organization. It fosters new ideas to boost business, improves customer satisfaction, and streamlines operations.

Here is an exercise to encourage initiative and proactive behavior:

Exercise: If I could, I would...

When we remove perceived barriers that limit our vision of reality, we allow ourselves to entertain possibilities. Organize a meeting and ask your team the following question:

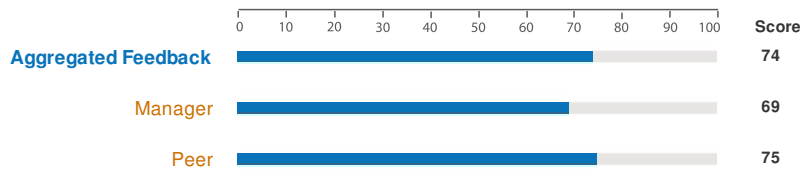
“If you had more autonomy and independence, how would your work attitude or work approach change?”

In many cases, a lack of initiative can be linked to a lack of confidence or a fear of how management will react. Asking this question can help you get to the root of why some of your employees are not more proactive at work, and allow you to take steps to create an atmosphere where initiative is encouraged.

Note: If employees are not comfortable answering this question candidly, you can have them answer it anonymously through a survey.

Flexibility

Degree to which a person is open-minded and willing to meet others halfway.



This team generally approaches tasks, the problem-solving process, and other people with an open mind. They are not set in their ways or opposed to trying new things, but there are times when they may prefer to follow convention. Overall, they do consider it important to be flexible and explore new ideas.

Here is an exercise to increase your team's flexibility:

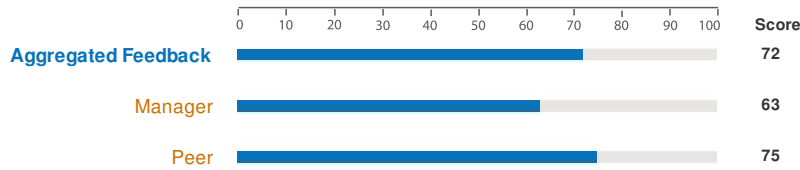
Exercise: Think of the possibilities

Being flexible means opening your mind to possibility. When we focus only on our way of doing things, we limit our potential to see and accept alternatives. When we allow ourselves to be open to other perspectives and other ways of doing things, suddenly, ideas start to flow and we begin to see limitless possibilities. For each of the problems below, indicate what your most likely solution would be, and then come up with at least two more alternative solutions.

- 1) **Problem:** There are a lot of disagreements going on during the planning stage of a team project. The group just can't decide which approach to take. What would you do?
- 2) **Problem:** One of your colleagues has just been appointed to a leadership position, and the power is starting to get to his head. He's giving out orders in an abrasive manner, and is barely taking on any of the work for himself. What would you do?
- 3) **Problem:** A customer has filed a complaint against you for being rude with her. While you may have been a little short with her, you did try your best to help her resolve her issue. This is the third time she has complained; she has also had an issue with two other employees. Your phone is ringing and she's on the line, asking for help with problem. What would you do?

Customer Orientation:

Degree to which a person is dedicated to making customers happy.



Although it wouldn't hurt to put this team through refresher training, their customer service skills are reasonably good. They know what it takes to keep customers satisfied, and are usually able to meet the demands of their clients and resolve any issues that may arise.

Here are some tips to help your team:

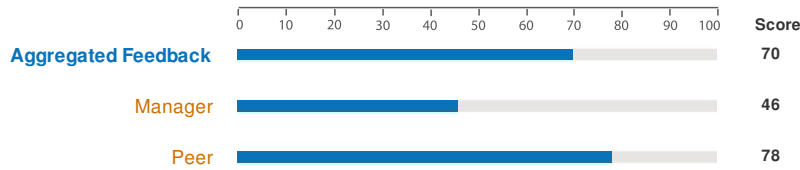
Create a "how-to" manual for different customer service situations.

Even if you've put your team through training, it might help to put together an instructional manual to help employees resolve the different problems they might run into when dealing with a client. It would also be a good idea to put this manual together in collaboration with your team, as they can provide different customer scenarios they run into on a regular or semi-regular basis. Some of the problems you can cover in your how-to document could include:

- How to deal with customers who don't read the fine print, so they blame the company for product/service mishaps, misrepresentation of facts, etc.
- How to handle technical issues that customers run into that are not related to your product/service (e.g. "I tried to order something online from your website but it froze" - because the person had a poor internet connection).
- How to respond to customers who have to go through long wait times on the phone.
- How to deal with vulgar and verbally abusive customers.

Coping with Stress

Ability to cope with pressure and stress in a productive manner.



Facing stressful situations can be a challenge, but the methods a person uses can make all the difference. While there is still room to improve, this team seems to be fairly capable of handling stress, and some may even perform at their best when the pressure is on. They likely adopt at least a few stress management techniques to help them cope with demanding work conditions.

Here's an exercise you can use to keep stress levels in the organization under control:

Exercise: Stress Trends

Many organizations only acknowledge the negative impact of stress when it has reached a critical level: When sick days, accidents, or turnover have increased at an alarming rate. As in sports, the best offense is a good defense. Conduct bi-weekly or monthly "stress tests" using the quiz below to assess stress trends in your company. If stress levels company-wide are starting to increase, take action. Implement an employee wellness/stress prevention program if you haven't already.

- | Make a checkmark in the answer option that best describes how you feel. | Not at all | Somewhat | Totally |
|--|-------------------|-----------------|----------------|
| 1) I feel overwhelmed | | | |
| 2) I feel overly emotional, like I want to cry or bite someone's head off. | | | |
| 3) I am having difficulty focusing on my work or making decisions. | | | |
| 4) I feel like people are demanding more of me than I can handle. | | | |
| 5) I feel rushed, like I don't or won't have enough time to get everything done. | | | |
| 6) I feel helpless, discouraged, or depressed. | | | |
| 7) I just want to shut down and go home. | | | |
| 8) I don't find any joy in my work. | | | |
| 9) The quality of my work is declining. | | | |
| 10) I can't stop worrying or thinking about my problems. | | | |
| 11) I feel like at any moment, I am going to crack under the pressure. | | | |
| 12) At the end of the day, I find it hard to relax and unwind. | | | |

How to score the quiz:

- Every "Totally" response is worth 10 points.

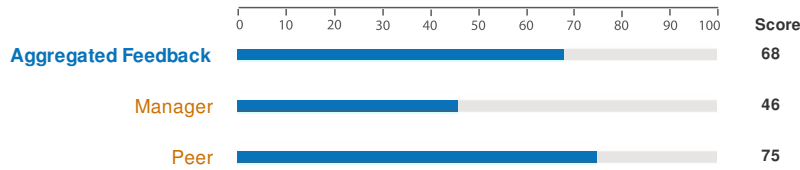
- Every “Somewhat” response is worth 5 points.
- Every “Not at all” response is worth 0 points.

Results

- Scores from 0 to 39: Current stress levels are low.
- Scores from 40 to 80: Current stress levels are moderate. Steps should be taken to reduce employee stress before it worsens.
- Scores from 81 to 120: Current stress levels are high. Immediate intervention is required.

Self-motivation

Degree to which a person is driven and intrinsically motivated.



While this group's motivation and enthusiasm can wane from time to time, on most occasions, they are able to find the incentive to propel them into action. Employees thrive on having a sense of purpose. When facing difficult times, this team (with the encouragement of management) needs to remind themselves why working hard is worth the effort, beyond the financial reward.

Here is an exercise to help you keep your team motivated:

Exercise: Digging for motivational gold

The best way to determine what motivates employees is rather simple - managers just need to ask. Create a list of motivators that management can and will be able to provide - in essence, make sure it's something that the company can afford and will be able to offer on a consistent basis. Your list can include:

- Regular, verbal praise
- Bonuses
- Gift cards
- Leadership opportunities
- Education courses
- Picnics or paid lunches for employees
- Time off

Send your staff the list and ask them to rank the motivators in order of most inspiring to least inspiring (employees need not include their name). You can also ask them to rank their current level of motivation on a scale from 1 to 10. You'll not only be able to gain insight into the state of your group's morale, but you'll also learn what it'll take to bring out more from them.

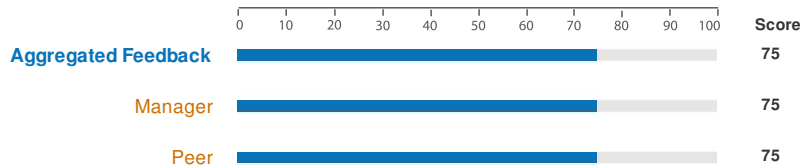
INTERPERSONAL SKILLS

The success of business relations depends heavily on the ability to interact effectively with others. Almost any job requires some degree of social interaction. Difficulties in this area can result in a number of interpersonal troubles and make it difficult to build a rapport with colleagues, management, and customers.

The following is a breakdown of the Interpersonal Skills scale, and how your team has been rated:

Communication Skills

Ability to share one's thoughts clearly and productively.



Overall, this team is usually capable of expressing themselves effectively. They are generally aware of what the communication process entails, although their communication skills could still continue to improve, as they may still be experiencing miscommunications from time to time. Fortunately, this team has a good foundation to build on.

Here is an exercise to help your team communicate clearly and productively:

Exercise: "I" Statements

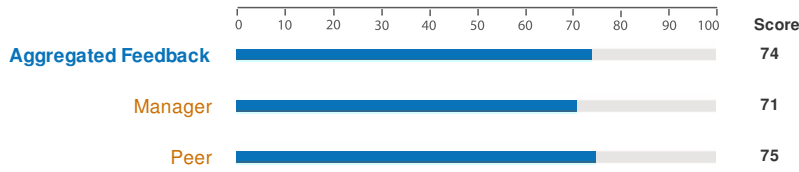
Whether expressing negative criticism or negative emotions, the manner in which you word it can make all the difference. The key lies in using "I" statements. When you use phrases that place the onus on someone else ("You never listen to my ideas"), its accusatory nature can put others on the defensive, and create uneasy conflict situations. By using "I" phrases ("It frustrates me when I feel like I am not being heard"), you acknowledge and take responsibility for how you feel, express it to the other person, and create a back-and-forth dialogue that can lead to a more productive conversation.

The goal of this exercise is to get your team to practice expressing their thoughts and feelings in an objective way. Have them think of a recent conflict they had with a customer or colleague that they would have liked to resolve better. Then ask them complete the sentences below, using "I" phrases.

- 1) I am upset because:
- 2) I feel that in order to remedy this situation, I would need to:
- 3) If we face this type of conflict again in the future, I would like to/I hope to:

Listening Skills

Ability to listen actively and attentively.



As a whole, this team strives to listen attentively to others. What they need to keep in mind is that listening is an active rather than passive process. This means asking questions to encourage more information, and listening to a person's words as well as paying attention to body language. They should also try to be more aware of habits they may be engaging in that could inhibit their ability to listen.

Here is an exercise to encourage your team to be an active rather than passive listener:

Exercise: Are you listening?

There are many little (and big habits) that we engage in that can hinder the listening process – habits that we may not even be aware of. As a team, add to the list of listening habits, both verbal and non-verbal, that can result in misunderstandings or missed information.

Non-verbal hindrances:

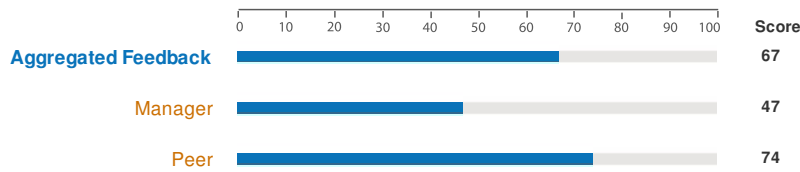
- Not looking at speaker
-
-
-
-

Verbal hindrances:

- Interrupting
-
-
-
-

Conflict-Resolution Skills

Ability to resolve disagreements in an objective and productive manner.



While there is still room to grow, overall, this group is reasonably skilled at resolving conflict. There are some occasions when their approach to conflict is not the most productive; it's not always easy for them to stay calm and poised. It is important, however, that all members of this group strive to remain objective when dealing with conflict situations, and to keep the goal of compromise in mind at all times.

Here is an exercise to improve your team's ability to deal with conflict:

Exercise: Knee-jerk reactions

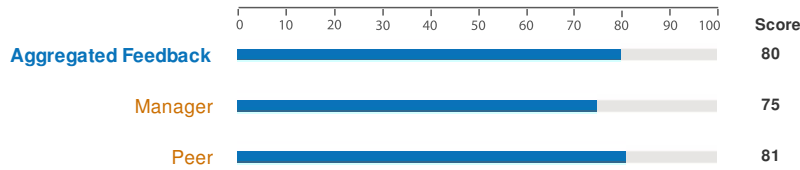
In the heat of the moment, we tend to go with the flow of our emotions. People are bound to push your buttons sometimes. This exercise helps to remind your team to take a step back, breathe, and keep things in perspective.

Scenario: You are on the phone with a client who is very unhappy with the results of a report that was prepared for him. It seems that you did not make the design and context of the report very user-friendly. The client explains that he can barely understand it and wouldn't even be able to show it to his customers. This is someone you've done business with for a long time. He tells you point blank that he would never have expected such poor quality work from you, and demands that you remedy the situation immediately. He is positively fuming.

- 1) What would you be your first, gut reaction to this? How would you feel and what actions would you take?
- 2) If you had a few moments to take a breather and think, what would be your reaction to this? How would you feel and what actions would you take?
- 3) If you had 24 hours to think about the situation, what would be your reaction? How would you feel and what actions would you take?

Agreeableness

Degree to which a person is amiable and easy to get along with.



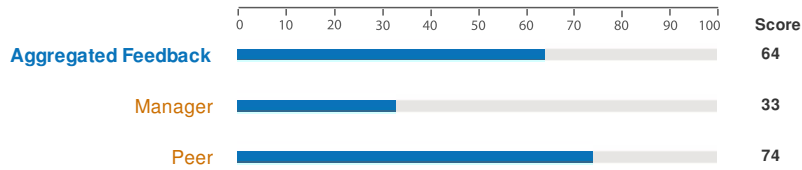
This group understands the importance of diplomacy, respect, and creating a warm and friendly atmosphere. They strive to be friendly and to treat people with tact, and are considerate of other people's opinions and feelings. They likely get along well with each other and with customers.

Here are some tips to help your team:

- Model tactful, diplomatic behavior.** If you're rude with employees or customers, micromanage your staff, or create an atmosphere where you constantly monitor everything employees do because you don't trust them to put in an honest day's work, this negativity will rub off on your team. Keep in mind that everything you say and do will be witnessed by your employees. Strive to be the example you want to see in others.
- Encourage honesty, but with diplomacy.** Negative feedback and dissenting opinions must be shared, but encourage your team to do so tactfully. Often, what we say is not as impactful as how we say it. Coach employees on how to speak with diplomacy, like using "I" phrases when offering criticism.
- Breed respect and camaraderie.** You have to genuinely care about making people happy if you want to foster a better company culture. Don't view employees as robots or tools, view them as human beings. Cultivate a sense of belonging and inclusion among all team members, and encourage helpfulness, mutual support, and collaboration.
- Competition doesn't have to be cut-throat.** In a competitive work environment where employees vie for customers, deals, sales, etc., don't encourage the concept of competition for supremacy. After all, each individual's success contributes to the company as a whole. Make competition a performance and improvement goal rather than a ruthless, no-holds-barred battle for top spot.

Assertiveness

Ability to confidently and tactfully share one's thoughts and opinions.



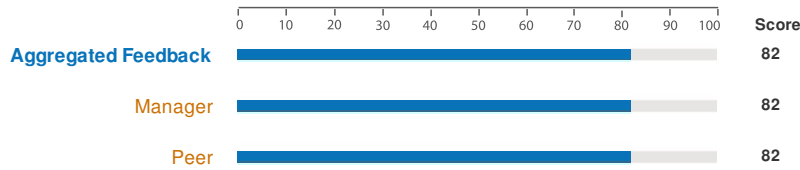
As a team, this group is generally quite assertive, although they seem to hold back sometimes. This isn't necessarily a problem, but it's important to keep in mind that it's better to speak up than hold things back from each other, from customers, or from management. As long as thoughts, feelings and opinions are shared tactfully, they should feel free to speak their mind.

Here are some tips to help your team:

- Encourage people to speak up.** Regularly ask for opinions during meetings or on projects, and get people involved in the brainstorming and decision-making process. You have to make your team feel like their input matters. Clearly tell your team that all ideas and suggestions are welcome and appreciate, even if they are not implemented. Most importantly, reassure employees that if they speak their mind tactfully, especially if they are disagreeing with something you have said or done, there won't be negative repercussions.
- Use positive reinforcement.** Asserting oneself in front of others or with an authority figure can be very intimidating. Commend employees when they display the courage to speak up and voice their disagreement. Give praise and justified compliments, and show your appreciation for their input.

Helpfulness

Willingness to assist others.



This team consciously concerns themselves with the needs of others, and willingly extends their assistance. They will often go out of their way to try to help those who are in need. Being helpful likely makes them feel good, even if they don't receive gratitude in return.

Here are some tips to help your team:

- **Foster cooperation.** Conduct team-building exercises and events. Regularly organize celebrations for successful projects or holiday parties. Make employees feel like they are part of a team and a “work” family, and they will be more likely to want to offer support and help to each other.
- Empower your staff by teaming them up with resource people. When hiring a new employee, set them up with someone they can go to when they have questions; give both employees explicit permission to work together. This will help orient the new employee into their position, and give the experienced employee a chance to improve their mentorship skills. Just be clear about what helping means. While it might involve some hand-holding initially, the resource person should encourage more independence as the new employee gains experience. Here are some important points your mentors should keep in mind:
 - Encourage the new employee to take notes.
 - Share productivity or efficiency hacks, and prepare templates (e.g. responses to common customer questions and emails; order forms, etc.).
 - Use mistakes as learning opportunities. Rather than just pointing out the mistake or correcting it yourself, indicate why it’s wrong, and show the new employee how to correct it.
 - Be patient and reassuring.
 - Make sure to commend and encourage the mentors/resource people, and praise employees who are willing to ask questions and solicit help. There is no such thing as a stupid question, especially when not asking can result in a serious mistake.

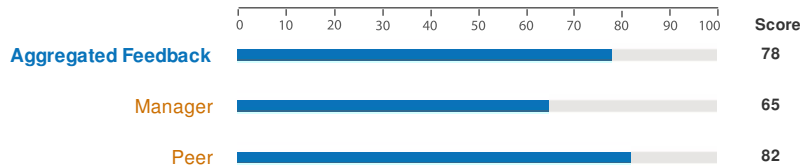
ORGANIZATION SKILLS

Organization skills are a combination of many elements; an organized worker is someone who can juggle multiple duties and deadlines and still stay on track. Those who lack these skills are more likely to be overwhelmed by their responsibilities. This can impact the quality and quantity of their output.

The following is a breakdown of the Organization Skills scale, and how your team has been rated:

Time Management

Ability to use time available in a productive and efficient manner.



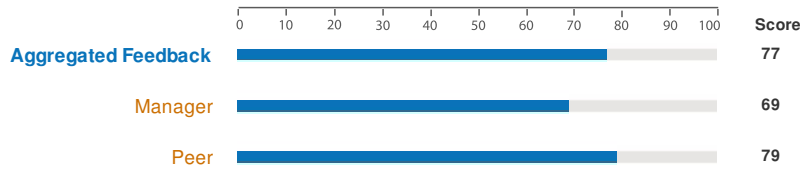
On most occasions, this group is able to manage their time well and get tasks and duties done promptly. They may still occasionally find themselves racing against the clock but for the most part, they use this particular resource quite efficiently.

Here are some tips to help your team:

- Involve people in project planning.** Not all missed deadlines are the result of poor time management. If your time estimates for a project are underestimated and your employees are not able to deliver a project on time, it may not be their fault. This is why it's important to include your team in the planning phase for projects. You can obtain more accurate time estimates from the people who will actually be working on the project, and you'll also get feedback as to whether the project goals you have set are feasible. Moreover, getting employee input can bring to light potential problems that you may not have envisioned.
- Work with your team on prioritization.** Provide guidelines on which type of tasks and projects should be considered a higher priority, and which can be done at a later time. Also, try to limit multitasking as much as possible, as it interrupts concentration and reduces productivity.
- Encourage people to cluster tasks together.** For example, rather than answering emails and returning phone calls throughout the day as they come in, have employees set aside some time each day to take care of correspondences in one shot. If an employee has questions for you or for another colleague, encourage him or her to compile all the questions and schedule a time for consultation, rather than interrupting someone's work every time a question comes up.
- Try to create work schedules according to a person's most productive times.** Each person's body has a schedule: Some people are more alert in the morning, when their mind is fresh and they've had their coffee. Others get more done in the afternoon once they've gotten into the flow of their work. Encourage your employees to organize their day according to their personal schedule. Mentally taxing tasks that require full concentration should be reserved for a more productive time of day, while simpler tasks can be done when employees need a mental break.
- Conduct efficient meetings.** Know when to call a meeting and when you can simply communicate information through other means, like email. Also, rather than having all employees sit through a meeting that might not be entirely relevant to them or their part of a project, have people come in and out when necessary. So if you're working on a marketing campaign, for example, don't invite the entire IT team during a brainstorming meeting that is centered around coming up with a slogan. The same concept of selective information-sharing can be applied to emailing: Discourage your team from CCing everyone on all emails if it is not relevant to the entire team.

Orderliness

Ability to maintain a tidy work environment.



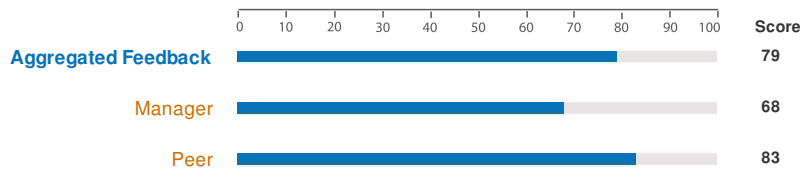
While they may fall into messy habits occasionally, for the most part, this team is fairly good at keeping their work environment neat and tidy. A neat work environment likely helps them stay organized, especially when things get busy.

Here are some tips to help your team:

- **Make neatness convenient.** Have a place for storing equipment, tools, and supplies. If a system is not in place for naming electronic and hard copies of documents and files (or different versions of a project) create one. Your company's filing system should be intuitive and easy to navigate, so that all employees can log into the computer system and easily access any document they need.
- **Encourage people to own their workspace.** The tidiness of an employee's workspace can speak volumes. If certain team members fail to see the importance of being neat, ask them to look at their work space from the point of view of their clients. If a customer walks into an office where papers are scattered everywhere and dirty dishes are lying around, they'll likely find themselves questioning the professionalism of the company and of the employee.
- **Do not tolerate messiness in communal areas.** Employees should be hold responsible for cleaning up after themselves, including washing their own dishes and clearing out the fridge *before* their food becomes a science experiment. It's common courtesy.

Organized Work Approach

Degree to which a person approaches his/her work in a structured, systematic manner.



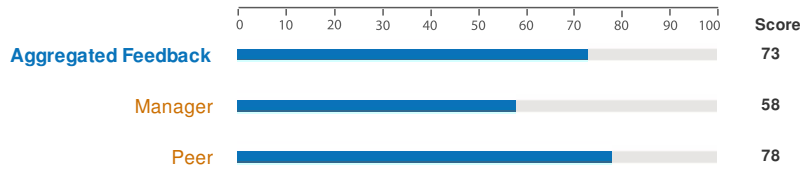
This team's work approach, while satisfactory, needs to be perfected. They are a reasonably conscientious and methodical group, but there are certain aspects of the way they work that may still need improvement.

Here are some tips to help your team:

- When tackling a multifaceted project, break it down into parts or phases.** With projects that have a lot of facets and interdependent tasks, it's important to structure the work plan in steps. In many cases, some parts of the project may need to be completed before other parts can be started. If you were building a website, for example, the first step would be conceptualization, then design, then preparing content – but the design aspect cannot begin until you have an idea of what you want it to look like. If your team needs to complete a complex project, encourage them to break it down into smaller parts - like the planning phase, the design phase, the writing phase, the programming phase, etc. Make sure that each step has a clearly outlined procedure and deadline, and that everyone knows what their part is.
- Encourage employees to work according to a structured schedule.** Although this might not be feasible on busier work days, persuade your team to structure their work day, particularly if they handle multiple tasks per day. For example, the mornings can be reserved for responding to emails, returning phone calls, or making orders; the early afternoon can revolve around bulkier tasks, while the late afternoon can entail less demanding work, like finishing paperwork, or preparing orders for the next day. Having more of a structure can improve concentration, efficiency, and productivity.

Goal-setting

Ability to set smart goals.



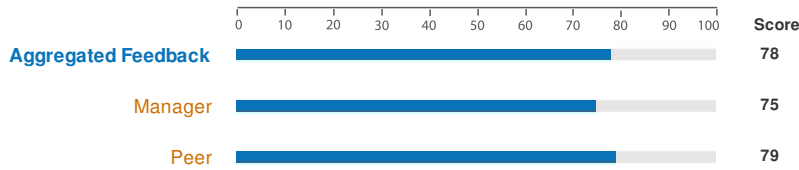
This group is reasonably goal oriented, and strives to set at least some goals. However, they may want to review their goal plan to see if there are any areas where improvement is warranted. Ambition provides the destination and perseverance the resolve, but it is this team's goal-setting knowledge that will lay down the path towards achieving their objectives.

Here are some tips to help your team:

- Assign individual goal as well as team goals.** Most managers strive to set productivity goals for their entire team, like increasing sales by a certain percentage, reducing wait time for customers, or completing a project earlier than the delivery date. While this is a good idea, individual employees may not necessarily feel a sense of connection to the goal; they likely understand how their work contributes to its accomplishment, but it may not be enough to create a sense of ownership. This is why it's important for managers to also set individual goals for each member of the team – something that the person can strive for and take personal responsibility for. Some individual performance goals you might want to set for specific team members could include making one new business contact every month, attending emotional intelligence workshops, or encouraging someone to take more initiative in meetings. Setting both individual and team goals will provide your employees with a sense of direction and purpose.
- Have regular team checkups.** Every month or so, team members should get together to review recent endeavors, successes and failures, determine ways to improve areas in which they are not up to par, and what to aim for next. For example, you may notice that last month, most members were unable to hand in their projects on time. Are the deadlines too strict? Were tasks delegated fairly? Did other members pitch in to help? Even if it's just a problem for one or two individuals, if it affects the entire team, it's a group problem, and should be handled as such.
- Use failures as a lesson.** Before writing off an unachieved goal or project as a failure, work with your team to analyze the situation. What went wrong? Did they run out of time or other resources? Should they have spent more time on the planning stage? Did they set their sights a little too high, or was their goal too vague? By determining where they went wrong, they can increase their chances of success for their next goal.

Prioritizing

Ability to organize tasks logically.



Although this team does prioritize most of their tasks and goals, this is a time-saving technique that they should strive to use as often as possible. By taking the time to order their tasks in an organized manner (in order of urgency, or according to their assigned deadline) they will be able to complete tasks successfully and, most importantly, on time.

Here are some tips to help your team:

- **Have a progress meeting at least once a week.** This allows everyone to remain up-to-date as to where projects stand, what tasks have been completed, what is left to be done, and any potential problems team members may have run into. Of course, this doesn't mean that progress reports should be limited to these meetings. If, for example, someone runs into a serious problem that could delay the completion of a project, insist that team members inform everyone immediately.
- **Prioritize tasks according to Stephen Covey's strategy in *Habits of Highly Effective People*.**

Stephen Covey offers a clever way to prioritize tasks with a really simple table. Encourage your team (or work with them) to categorize each of their tasks and assignments according to this structure:

	URGENT	NOT URGENT
IMPORTANT	A	B
NOT IMPORTANT	C	D

Covey offers the following guidelines for categorizing tasks:

- **Section A (Urgent & Important):** This includes any task that has a tight or upcoming deadline (or is overdue), or an unexpected emergency/crises. Team members should focus on completing tasks in this section first.
- **Section B (Not Urgent but Important):** This section consists of important long-term goals, like gradually but systematically updating the company's software or technology, improving specific skills (computer skills, communication, leadership), or team-building. These assignments should be considered next on the list of priorities.
- **Section C (Urgent but Not Important):** Tasks that fall into this category should be considered less of a priority and even viewed as "deceptively" urgent. This might include emails, phone calls, or meetings – tasks that team members might consider important enough to be handled immediately, but could actually be postponed to a more convenient time.
- **Section D (Not Urgent and Not Important):** Tasks in this category are of the absolute lowest priority; in fact, they should not be considered a priority at all because they are more likely to waste valuable time. This includes surfing the internet for personal use, idle chatter, making personal calls, etc.

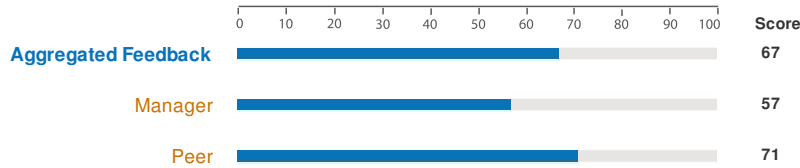
COMPETENCIES

The competency factor covers various work skills that help employees complete everyday tasks as well as contribute to their long-term success. These are competencies that are transferrable to various job settings, positions, and fields.

The following is a breakdown of the Competencies scale, and how your team has been rated:

Technical Skills

Ability to use the technology available at work to perform one's tasks.



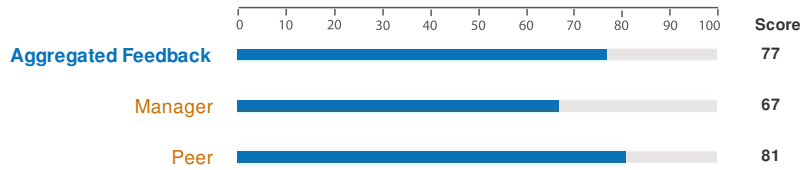
In terms of technical skill, this team is progressing well. Some additional training is still warranted, particularly for team members who might still be struggling with some of the technologies that this company is using.

Here are some tips to help your team:

- Assign a resource person, trainer or mentor.** Have at least one employee be the go-to person to train new or existing employees on how to use company tools, equipment, or software. More often than not, it's a fear of new technology that hinders employees, rather than a lack of knowledge. Having a go-to person ensures that there is always someone available to trouble-shoot issues in case something goes wrong or someone has questions.
- Promote self-education and self-sufficiency.** Build learning into performance criteria. Create documents with step-by-step instructions on how to use a particular machine or software, along with FAQs and common issues that employees are likely to run into. Share easy-to-read, relevant articles about quick how-to's, shortcuts, and trouble-shooting steps on the technologies and software the company uses (e.g. how to create formulas in Excel).
- New technologies require more than an instructions manual.** If your company is adopting a new software or equipment that is vastly different from what your employees are used to, it's in their best interest and the company's best interest to send them for structured or off-site training. They will be trained by a professional who can better orient them with the new technology.
- Account for your team's need to update technical skills during work hours.** For example, if you have a common issue that several team members are struggling with (a new technology that people are having trouble adapting to, or a common mistake that everyone is making), schedule a quick group session or an "IT Q&A".

Team Player

Degree to which a person is able to work with others toward a common goal.



The premise of teamwork is for everyone to work toward the success of the group as a whole. While this group seems to be fairly team-oriented, there might be some discord on occasion. Perhaps not everyone is feeling heard and respected, which is a group issue that will need to be settled. Overall, however, they appear to be a fairly cohesive team.

Here is an exercise to encourage team spirit:

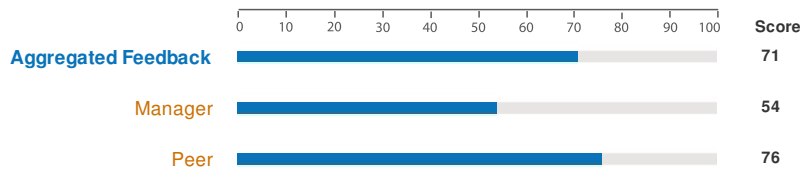
Exercise: Walking a mile in someone else's shoes

Sometimes, when a group is going through a difficult time, it can feel like you're a group of rivals rather than teammates. What's important to remember is that each person is part of your group for a reason; you each possess a unique piece of the puzzle that makes this group a whole, and this is often what you lose sight of when dealing with stress or other problems. So with each teammate in mind, answer the following questions. You can share your responses after.

- 1) What strengths does this teammate possess that you wish you did?
- 2) How does the team benefit by having this person as part of the group?
- 3) What would make this person a good leader?
- 4) What type of challenges or obstacles has this person overcome that you truly admire?

Leadership Behavior

Degree to which a person shows leadership potential.



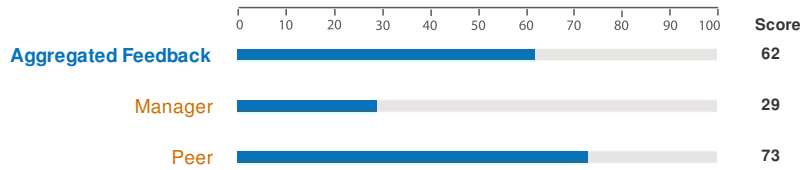
Should management decide to promote from within, there are at least a few employees on this team, if not more, who show leadership potential. Most of them are comfortable taking charge in situations, and have taken it upon themselves to share their knowledge and expertise with those who need guidance or coaching. This is a strong group of budding leaders.

Here are some tips to help your team:

- Gradually delegate some of your managerial responsibilities.** In order to give your team a sense of what it means to lead others, hand over some of your duties, like preparing schedules, conducting orientation meetings, or creating a project plan. Keep in mind that simply handing over the reins is not enough – you need to walk the employee through the task and offer clear guidelines of how it should be done. As the employee gains more experience with the task, spend less time instructing and more time shadowing the employee until he or she gets the hang of it. Just make sure that the task you are delegating is within the person's area of expertise, and doesn't detract from his or her regular assignments.
- Put employees in charge of team projects.** Project management is a complex skill, but it's a valuable one to learn. Guide employees through the process of putting a project together, from conceptualization to planning, allocating resources, creating deadlines and time estimates, assigning duties, monitoring progress, testing and debugging, and completion. Walk them through every step you take, or better yet, have them shadow you as you prepare for a real project. Once the employee has the concept down pat, have him or her take charge of a minor project, and then gradually assign more complex ones. As with almost any skill, the best way to learn is through hands-on experience.
- Model proper leadership behavior.** It goes without saying, but if you want to groom proper leaders, you need to model the behavior you want to see in them. Leading others is more than just sitting behind a desk and dispensing orders. Among other things, it means offering constructive feedback to encourage improvement, rewarding and praising hard work, creating short and long-term goals, and behaving with integrity at all times.

Decision-making

Ability to make smart, well-calculated decisions.



This team has the ability to think critically about a decision and its possible consequences, but they could likely still benefit from some guidance from management. On most occasions, this group makes careful, confident, and calculated decisions. Overall, they can be trusted to make effective and successful decisions; they show sound judgment when making a choice

Here's an exercise to help your team make well-calculated decisions:

Exercise: The pros and cons template

When you need to make an important decision, creating a visual representation of all your possible options can be very helpful, even when you don't have a great deal of time in which to make a choice. The idea of creating a list of pros and cons may seem simplistic, but writing them out can really help clarify things.

If you have a major decision to make, grab a piece of paper and divide it into two columns labeled "Pros" and "Cons." Give each pro and con a score from 1 to 10: If it has little impact on the outcome of the decision, give it a low score; if it has a major impact on the outcome of your decision, give it a score of 10. When you're done with your list, add up your scores. As a group, review the list and choose the most viable option. Here's an example:

Decision to be made: Should we spend extra money this year for a new marketing campaign?

Pros:

We did one two years ago and it really helped (score: 10)

It could boost sales (score: 9)

It will make people more aware of our brand (score: 8)

Total score for pros:

Cons:

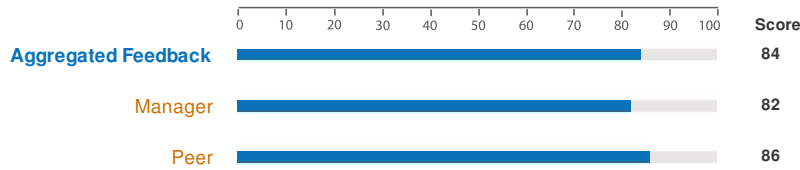
It will require a lot of time and resources to come up with a campaign idea, whether we do it in-house or hire someone to do it. (score: 9)

If we spend money on this campaign, we won't have enough money for... (score: 10)

Total score for cons:

Job Proficiency

Degree to which a person is able to competently complete his/her assigned tasks.



Whether it's a result of a well-formulated hiring process or a strong training and orientation program (or both) this organization has been able to put together a very capable and proficient team. Most of the members of this team, if not all, have shown that they can effectively and competently handle the tasks their job entails – and possibly even assignments that push them outside their comfort zone a little. This is a skilled and talented team.

Here are some tips to help your team:

Consider the benefits of a gap analysis.

The onus of bridging the gap between a person's current skill level and the requirements for the job falls on both the employee and management. While your team needs to be willing to learn and be open to training, you need to provide the tools that will allow them to reach their full potential. Here's how you can bridge the gap:

- Assign personality and skills assessments to determine where your team stands in terms of their competencies and where they need to be. Better yet, use top-performing employees as benchmarks.
- Based on the results, assign tasks, at least initially, according to employee preferences – or let the person volunteer for assignments. This will build confidence, and help ease a person into the dynamics of how company operations are run.
- Team up the employee with colleagues who have complementary skills and personality traits. Assigning a mentor or someone to shadow can provide essential knowledge and experience.
- Adjust your managerial style to personality of individual employees. You need to be able to adjust your approach according to what works for your team. For example, some workers dislike being "micromanaged," while others prefer having their role and duties clearly outlined in detail.
- Adapt how information is communicated (e.g. specs for projects) according to an individual's learning style or intelligence type. For example, some employees with a logical learning style prefer step-by-step instructions with flow charts and bullets. Creative individuals often prefer to work at their own pace and have their own style of coming up with ideas or completing projects, and thus, would benefit from a less hands-on approach (as long as they clearly understand the goals and constraints of the project).

Question 70:

Are there any additional comments you would like to offer as it relates to this person's performance? If so, enter your comments below. Otherwise, click Finish.

Self:

- I feel I need to take more control of scope creep. Making clients happy is very important to me, but I can go overboard and offer too much, as my teammates sometimes tell me. I also feel I can be more assertive in terms of putting my foot down when a matter is really important to me. I need to reduce my multitasking tendencies.

Manager:

- His confidence is not as strong as it could be. He needs to be more assertive, especially when people make demands on his team that he can't fulfill. I think that she should also try to take more risks. His fear of failure can hold him back a lot. He needs to trust himself more.
- She needs to speak up for herself more.

Peer:

- I'd like to see John be more assertive and confident. I feel that even after being with the company for many years, he still holds back sometimes, although I have seen a great deal of improvement in this area. John has so much potential and I'd like to see him branch out more and take advantage of opportunities to increase his visibility. He has what it takes to achieve amazing things.
- I call him the "Master of Details" because he always ends up finding the mistakes that other people miss. He is very good at quality control and a good devil's advocate when brainstorming, which he balances out with creativity.
- Exceptionally good at his job and often goes above and beyond the call of duty. He is a someone you can always depend on, who can handle autonomy, but who also knows when to ask for help.
- She has room to grow in a few areas, but she has an eagerness to learn. This is the perfect combination. I feel she has a lot of potential.
- Smart, learns quickly, gives all she's got. A true gem.
- Great teammate and friend. Works hard, dedicated, and committed to doing a task well. Can always depend on her.

Additional Materials

For other references that can enhance performance, feel free to review the materials suggested below.

Books:

Title: The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change

Author: Stephen R. Covey

Publication year: 2004

Publisher: Free Press

URL: <https://www.amazon.com/The-Habits-Highly-Effective-People/dp/0743269519>

Title: The Last Lecture

Author: Randy Pausch

Publication year: 2008

Publisher: Hyperion

URL: <https://www.amazon.ca/The-Last-Lecture-Randy-Pausch/dp/1401391443>

Title: The Happiness Advantage

Author: Shawn Achor

Publication year: 2010

Publisher: Crown Business

URL: <https://www.amazon.ca/The-Happiness-Advantage-Principles-Performance/dp/0307591549>

Title: The Power of Habit: Why We Do What We Do in Life and Business

Author: Charles Duhigg

Publication year: 2014

Publisher: Random House Trade Paperbacks

URL: <https://www.amazon.com/The-Power-Habit-What-Business/dp/081298160X>

Title: Serial Winner: 5 Actions to Create Your Cycle of Success

Author: Larry Weidel

Publication year: 2015

Publisher: Greenleaf Book Group Press

URL: <https://www.amazon.ca/Serial-Winner-Actions-Create-Success/dp/1626342342>

Videos:

Title: The puzzle of motivation

Author: Dan Pink

Publication year: 2009

URL: https://www.ted.com/talks/dan_pink_on_motivation

Title: Your body language shapes who you are

Author: Amy Cuddy

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