Performance Management

Setting Goals & Expectations

Presented by: HRM
Agenda

Performance Cycle

Setting Goals
- Alignment
- SMART

Practice
- Draft & Align
- Metrics

Key Points
The Performance Management Cycle

I. Performance Planning/Expectation Setting
   - Goal Setting
     - Clarify expectations
     - Establish annual goals
     - Link to college/division goals
     - Plan professional development

II. Ongoing Review and Feedback

III. End of Year Evaluation

Northeastern University
Human Resources Management
Goals & Setting Expectations Scenarios
It’s all about alignment

• Alignment is a way to relate the work of the team and individual to the overall mission and goals of the university.

• Linking individual work to overarching goals helps you to know:
  – What organizational issues influence work
  – How the unit contributes to the University
  – How the team contributes
  – How you as an individual contribute
Key Tips on Writing Goals

- Focus on the individual’s work to ensure their actions are directed at achieving results critical to the organization's success.
- Connect the individual’s work to the goals of the department, division and Northeastern overall.
- Do not encapsulate the entire job, only the key goals, projects, and accountabilities. Set one professional development goal each year.
- Typically goals start with a verb and focus on the end results.
- Goals should be SMART

**SMART Goals**

- Specific
- Measurable
- Achievable
- Results Oriented
- Time Bound
Metrics – Delivering Desired Results

• Metrics outline the details on how results and performance will be measured.

• Typical measurements include:
  – Completion: on time, on budget, exceeded need
  – Customer: who did you reach? how received?
  – Financial: costs, savings, revenue, etc.
  – Quality: accurate, excellent, delights the customer
  – Process: creative, efficient, less steps, more automation?
## Improving Goals: Why SMART?

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<thead>
<tr>
<th>GOAL:</th>
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<th>M</th>
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</thead>
<tbody>
<tr>
<td>I want to lose weight</td>
<td>❌</td>
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<td>I want to lose 20 lbs. by April. I will perform a half hour of cardio and half hour of strength training per day, 5 times a week and I will only eat starchy carbohydrates 3 times a week.</td>
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Key Points about Performance

Set Expectations
• Be clear & specific
• Review job responsibilities
• Discuss “fully meets”
• Create a plan
• Check in regularly
• Ask for input

Be Consistent
• Provide frequent feedback
• Review goals regularly
• Discuss expectations
• Assess results
• Foster open environment
• Gather feedback, too
  – don’t just give it
Development is a process ... not an event
Development Planning

Development plans should be customized and integrated into the day-to-day job in order to be impactful.

• Leaders should:
  • Be engaged in the development process
  • Identify development opportunities that leverage an untapped strength or close a performance gap
  • Outline the results expected to be achieved; monitor activities and provide feedback and coaching on performance and development
  • Specify key development activities or additional support needed to promote growth and development
  • Provide a consistent message to all regarding development
Summary Points

Goals & How to get there

• Be sure to spend focused time with all of your direct reports to determine their key goals for the year, to determine their unit, division or department, and organization-wide impact and to discuss their development goals, including learning action plans and measurements for success.

Development

• Spending time discussing and documenting your direct report’s development needs can be both a short- and long-term benefit to you in terms of motivation and growth.

Feedback, feedback, feedback

• For development to occur, individuals have to
  • DO something NEW,
  • DO something DIFFERENTLY than before, or
  • STOP doing something currently being done.
Resources

- **lynda.com** – accessed through [myNEU](https://myneu.neu.edu)
  - Managing Your Team
    - Section One: Motivating Your Team: 7 minutes
      - Mastering the goal setting process
      - Elements of effective goals
  - Leading Productive One on One Meetings
    - Section Two: Setting up a One on One: 2 ½ minutes
      - Determining the agenda

- **HRM**
  - [For Managers – Performance Mgt.](https://www.neu.edu/hrm)
    - copies of previous presentations, forms, tips
  - Discussion & Practice - we’re here to assist you with this!
    - Reach out to your HRM Consultant or Training & Development with questions or to practice.