Perform & Develop - Reviewer Training 2021

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BAM Nuttall v3

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Time	Subject	Duration
1000-1010	Introduction & Win	10 mins
1010-1020	Process overview	10 mins
1020-1040	Conversations that matter & CF	20 mins
1040-1050	Goals Setting & the P& D Conversation	10 mins
10.50-10.55	Performance and Development Goals	5 mins
10.55-11.00	**BREAK**	**5 mins**
11.00-11.15	SMART goals	
	Have a go - breakout	
11.15-1130	Situational Leadership Coaching Skills	5 mins 5 mins
1130-1135	Tools & Guidance	5 mins
1135-1145	System Demo	10 mins
1145-1155	Support Implementation Advisors	10 mins
1155-1200	Questions, Consolidation and Close Evaluation	5 mins

SESSION	NOTES	EQUIPMENT
Introduction & WIN 10.00-10.10 (10 mins)	**Welcome to Reviewer Training - 1** **Introduce self** Thanks for joining the session. Today we will be looking at what you need to do to complete effective performance reviews for yourself and for your teams. I will take you through the new Perform and Develop process, how the process fits into our competency framework and our Performance Management culture. We will also focus on how to deliver an effective process and the skills you will require to do so. I hope that after today, you will see the value in the use of the Perform & Develop as a performance management tool. You as Managers/Reviewers are responsible and accountable for the performance and development of your teams. **Some general housekeeping - 2** **Domestics** Headsets, mute mics, cameras, screen breaks, move around, slido and code, download on your devise. **Slido: How many direct reports do you have? Slido #RS02** That's great, so you all do reviews **Aims and Objectives - 3** So let's have a look at our aims and objectives for the day. **Aim:** To have provide you with the skills and tools as Line Managers to enable you take responsibility and accountability of your team's performance and development through effective performance reviews. **Objectives** At the end of the training, delegates will be able to: ▪ Understand the Perform and Develop process and why conversations matter ▪ Explain the benefits of setting goals ▪ Explain how an employee sets a Goal ▪ Describe your role in supporting employees in setting Goals ▪ Explain how to set team goals ▪ Explain how to cascade goals ▪ Produce SMART performance and development goals in relation to individual and business objectives	**Slide 1** **Slide 2** **Slide 3**

10.10 – 10.20 (10 mins)	**Process Overview - 4** We have had a PDR process in place for some time now and a good reputation for take up. For instance in the last two year completions have been over 80%... so why the new process? We needed to improve and strengthen our performance management approach across BAM. The practices across OpCos varied significantly in maturity, The inconsistencies across the Group birthed a project scoped to re-establish a One BAM Performance Management approach with the following characteristics: • One cycle that reflects and is relevant for our business operations • Empowers and enables employees to own their own performance and development • Drives dialogue between the employee and line manager that is relevant and beneficial for both parties. What is the importance of 'conversations that matter', which are at the heart of Perform and Develop. As part of the One BAM approach, Group has focussed on developing and sharing best practise across all Opcos and hence the roll out of Perform & Develop that replaces our old P&D IT system. All Opcos and Line managers will be going through the same process in terms of goal setting and capability workshops. We are already well versed in the PDR process and the importance of PDR's so this should not be a steep learning curve. **Overview of Perform & Develop - 5** **<u>Goal setting Q1 -</u>** V high level overview, talk through the whole cycle The cycle starts with setting performance and development goals. Performance goals define your contribution to the business. Development goals enable people to become the best version of themselves. This is an on-going process. Goals can be adjusted throughout the year to ensure that they remain realistic and feasible. **<u>Check-ins Q2-3</u>** These continuous informal review conversations can happen anytime in the course of the cycle about people's well-being, performance, and growth and future career aspirations. People do these anyway and it could range from a five-minute chat to a quick phone call to see how you are getting on. It's a good opportunity to give and receive feedback and nipping anything in the bud and getting things on track if required. If any of your goals change as a result of the check-in then the onus is on the employee to ensure that it is recorded on the system.	**Slide 4** **Slide 5**

Goals & Development Conversations Q2-3
This is a conversation mid-way through the annual Perform and Develop cycle, where achievements and improvements are discussed. Allow a bit more depth and time to review progress and a good opportunity to give and receive feedback. Touch on well-being, career aspirations and an opportunity to acknowledge good performance and discuss any areas requiring more focus/improvement. Two-way feedback.

Year end conversations Q4
In the Year-end conversation, the employee's performance results and development is reviewed. This will take place in Nov and we will train in August/Sept to prepare.

Focus is **what** they have done and **how** they achieved it. What has been exceeded or what further development is required. Whereas in Nuttall we have informally encouraged year-end conversations to close out, the difference now is that we are making it a more formal review of performance that year. The year-end review also supports the global calibration process where we go into performance and potential discussions to inform our talent review and succession planning.

How Perform and Develop relates to CF and Employee life Cycle

Performance Management has many different strands, now that we have looked at the step by step cycle, let's consider this in relation to our BAM Nuttall competency framework that represents the lifecycle of our employees.

Our Competency Framework
Our competency framework, which I know many of you will be familiar with; is the model that supports our people throughout their employee lifecycle at BAM Nuttall.

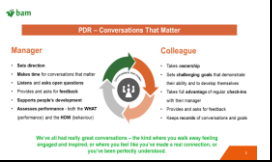
In **the inner circle** are accountabilities, values, technical competencies and L&M competencies all of which can be found in your role profiles on Connect and used in the performance management process as part of the self-assessments.

The **middle circle** ensures that we are recruiting the right people into the right roles, we support our people by managing their performance through our perform & develop processes and setting performance objectives, as well as developing our talent with our development objectives and opportunities and talking about people's future careers using career plans that feed into our wider business succession plans

When we do all of those elements well it supports the delivery of our **People, Profit** and **Planet** agenda.

Slide 6

Side 7

10.20-10.40	**Commitment of BAM** So we can see that or business initiatives e.g. One BAM HR demonstrate a real commitment to career planning, our peoples personal development and providing a platform for them to perform and develop and the **support for you in your role as a people manager/ reviewer.** **Conversations that matter – 8** The key message for our new process is **conversations that matter** It is important to follow the process and record the conversations but what makes it valuable and engages people are the <u>conversations.</u> Before we look at conversations that matter…. What do you think makes a good conversation? **Question?** Remember a really good conversation you have had. What made it special for you? You can use chat or just show by hand if you would like to answer Let them speak to it or Read answers as they pop up and talk through them. Note answers Check for similar themes….. the key thing there is to remember what makes it valuable for you and prepare to go into the conversation with that end in mind…… Show next slide after discussion…… **The roles of the Manager and the Employee - 9** **Its about making time and creating** opportunities to strengthen relationships between managers and team members, develop trust, and create a safe environment for them to talk candidly about what matters to them. Employee feels listened to and is able to talk to manager freely about anything. Diversity and inclusion. Now put the slide on to review roles. **What are the advantages to the new approach to performance management? - 10** **Business** Key for us as a business is about developing and maximising potential of our people and retaining them and being an employer of choice. It allows us to manage/reward good performance and manage poor performance (discussion, restating, clarifying objectives) Plan, do, review **Employee**	**Slide 8** **Slide 9** 

	What they need to do, what they are good at, where they need to focus, where they need to get better, how they get better and what support they have to do that. It is about having that focussed attention, purpose and feeling valued and recognised and also about being able to have that not so good feedback in an open, trusted and supportive environment where you can be challenged and learn from your mistakes through coaching and regular feedback. **Manager** The benefit for you as a manager is creating that safe and trusted environment where you are having regular conversations; you can get the best out of your team and people can approach you and talk to you creating that culture of highly engaged work force and high performance. A high performing team is a critical measure of a manager's success. Lots of advantages why we need to do this and hopefully some of you can attest to it in your career or role as manager. Next we'll look at **goal setting and the benefits** of setting goals.	**Slide 10**
10.40 – 10.50	**Goal Setting & Perform and Develop Conversation – 11** Next we will focus on goal setting and how to set goals with your team. So what are the benefits of setting goals? Ask the team…… • People have a purpose • They know what is expected • They have clarity • They can measure success • The sense of satisfaction through the journey as well as at the end Research by Sonja Lyubomirsky, professor at Stanford University and happiness expert, has shown that picking a few significant goals that are meaningful to you and devoting time and effort to pursuing them is one of twelve activities that can boost your happiness. According to her, people are much happier when they are pursuing their goals than when they've achieved them. Goal setting is the foundation to ensuring that each employee knows how they are contributing to the success of the Business – they feel part of the Company Mission! Next we will look at how to support you team to set goals…… **How do I help my Team to set goals? – 12** Here is an overview of what you need to when setting goals – talk through slide	**Slide 11**

- Ensure that your team is aware of overall business, project and team objectives
- Make time for a conversation with your team members about setting their goals – either to help them to identify appropriate goals or to review goals they have prepared themselves
- It is very important to stimulate ownership. Give the employee space to experiment with setting goals. It doesn't have to be perfect at the first time.

The Performance & Development Review and Cascade Process - 12

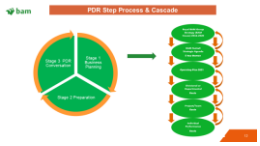
As stated the conversation is what matters and to help with goal setting at BAM Nuttall we already have good practice in planning and preparing for your teams PDRs in that we prepare for them.

First, we complete our business planning and cascade the operational plan represented in the diagram.

These should reflect those plans allowing people to **recognize their contribution to the success of the business**. When setting goals here are some of the considerations

Slide 12

Slide 12



Preparation & Conversation -13

Things to consider – what will you need when prepping?

Let's discuss some questions plenary:

1. What information do you need?
2. What do you need to prepare to set goals for your team?
3. What challenges do you see for yourself when setting goals?
4. How will you engage with your team to get buy-in for goals

Here is an overview of what you need to when setting goals – talk through slide

Slide 13

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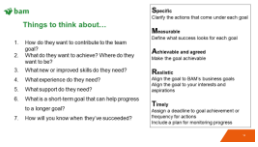
- Make time for a conversation with your team members about setting their goals – either to help them to identify appropriate goals or to review goals they have prepared themselves
- It is very important to stimulate ownership. Give the employee space to experiment with setting goals. It doesn't have to be perfect at the first time.

You may consider:

Performance Goals

- Do they require development to achieve their Performance Goals?

	• Behaviours – The "How" they do their job – are they demonstrating the values? • Competencies – if you have a competency framework – have gaps been identified in their competencies? **Development Goals** • What are their short-term career aspirations – what development do they need to get there? • What are their long-term career aspirations – what development do they need to get there? Show slide 14 and run through Types of Goal…… **Performance & Development Goals - 14** All that preparation then supports the end result of goal setting. Ask **What is the difference between Performance Goals and Development Goals**? Answer on click • **Performance goals** are job-oriented. They are results-based statements of the employee's important ongoing and special project responsibilities. • **Developmental goals** are learning-oriented. They spell out the skills, knowledge and experiences the employee needs to either remain effective in his/her current job or support the employee's ability to take on new responsibilities and grow in his/her career. **How much of your job should your Performance Goals Cover?** • Performance goals should cover your entire job. They include both ongoing, day-to-day responsibilities and special projects and may include stretch goals. They should be written to describe your broad areas of responsibility and the most important results you are working to achieve. **Why are Development Goals important?** • Development Goals focus on learning, which is key to individual and organizational performance. Achieving Development Goals leads to increased personal job satisfaction, which increases workplace morale. A commitment to employee development helps recruit, retain and motivate successful employees. • Development goals enable you to become the best version of yourself – developing new or existing skills, preparing for your next career step.	**Slide 14**
10.50 – 10.55	**Why are Performance Goals important?** • Performance goals define your contribution to the business, and should be aligned with overall business, project or team objectives.	

	We will report on goal completion throughout the year to ensure everyone has goals to work towards e.g. a new starter in May will be able to go in and set goals. If you move projects, you can update. There is greater flexibility to set shorter terms plans that full year **goals.**	
10.55-11.00	**BREAK**	**5 MINTUES**
11.00-11.15	**SMART Goals and the Goals Conversation – 15** **Things to consider** So when we set goals, there are several things to consider **Specific** • Clarify the actions that come under each goal • Use action verbs to describe what needs to be done and how • (with examples where possible) • Determine the information and resources required • Identify restrictions and boundaries • Create a step-by-step action plan, with key milestones set out **Measurable** • Define what success looks for each goal • Include expected results and by what standard the goal will be achieved. • For example: • Target area – measure • Chargeable hours – percentage **Achievable** and agreed • Make the goal achievable • Agree target / measures associated with the goal • Realistic • Align the goal to BAM's business goals • Align the goal to your interests and aspirations Timely • Assign a deadline to goal achievement or frequency for actions • Include a plan for monitoring progress	**Slide 15** 
11.05 -11.15 (10 minutes)	**Setting SMART Goals Activity 10 minutes – Break out rooms** **Name who goes into which room and time them. Remind about white board or use word.** **Time for a break activity – 10 minutes (5 to do 5 to feedback)** • Split group into 2 groups per room • 1 groups to have performance goal	**Breakout Rooms White Board**

	• 1 group to have development goal Give 3 minute and 1 minute warning, and bring back. Give the groups 5 minutes to discuss what they think relates to each area along with a meaningful definition	
11.15-11.20	**Coaching Skills – 16** **Discuss and put up slide** Something to consider when setting Performance Goals is how much support will be required – can you just delegate and leave them to it or will they need Training, coaching – this then links well to Development Goals Next we will look at Coaching Skills and Situational leadership **Q. What is coaching?** **Coaching** A training or development process via which an individual is supported while achieving a specific personal or professional competence result or goal. **Q: What are the some of benefits of creating a coaching culture?** • Inclusive • Engaged • Motivated • Feeling valued Research shows that companies with strong and effective corporate and coaching cultures are often characterised by high levels of employee engagement, productivity, company innovation, customer satisfaction and retention. **Q: So, having looked at what Coaching is, why is it such an important skill to have as a Line Manger/Reviewer?** • To enable to the reviewee to develop and grow, so you are not always giving them the answers. So you can get them from a starting point to competent and confident. **What are effective Coaching Skills? Put up slide 16**	**Slide 16**
11.20-11.30	**Situational Leadership - 17** **Q: Is anyone familiar with this model?**	**Slide -17**

The style a manager uses under situational leadership is based upon combining levels of **directive behaviour** and supportive behaviour. You can think of directive behaviour as an “instruction” and supportive behaviour as providing support or guidance.

Situational leadership is about tailoring your management style to the reviewee.

There are 2 axes: **competence** and **confidence.**

S1 Instruction - instructing people is applicable when there is low competence but high confidence. For example the first time they carry out a task, particularly if they are new to the company.

S2 Directive Coaching – directive coaching is applicable when there is some competence but low confidence. For example, you will ask questions (inquire) to help the reviewee to work it out – guiding them in the right direction.

S3 Non-directive coaching – is applicable when there is high competence but variable confidence. For example “Tell me how you are going to do it?” and let them come to their own decision. Or they come to you to clarify they are on the right path.

S4 – Delegation where there is both high competence and confidence. For example, a task that they have carried out many times before and are competent and confident to go away and carry the task out effectively, but they can still come back to you if they need to.

Not only is it about tailoring your style to the employee, but you may need to offer different support for different tasks for an individual.

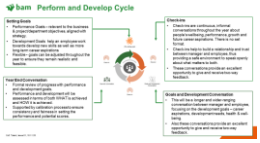
For example you may be able to just give an individual a task that they are competent in and let them get on with it with nearly no guidance (S4). But then you may introduce them to a new task where they have little experience and they need lots of guidance and support (S2).

Knowing what stage they are at with a goal can help you know what support to give. If you don’t ask you could delegate a task when a reviewee really needs instruction first or you could micro-manage by instruction when a reviewee is fully competent to have the task delegated.

Next we will look at the support available to you as managers

Setting Team Goals - **20**

As a manager you can set team (performance) goals or cascade your personal performance goals to other individuals. (This is not possible for Development Goals) demo or talk through if you have time.

	Perform & Develop Cycle - 31 A reminder of the cycle **Consolidation** **Today's Objectives** - **32** Finish on final quote - **33** **Q: Any questions? - 34** **Complete Evaluation - 35** **Thank you.**	**Slide 31**  **Slide 32** **Slide 33** **Slide 34**