



PUTTING PERFORMANCE MANAGEMENT & TEAM DEVELOPMENT TO WORK FOR LOCAL GOVERNMENTS

PERFORMANCE MANAGEMENT



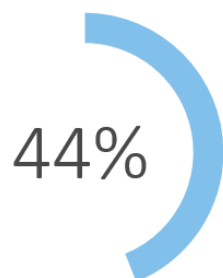
Performance management is the systematic **process** by which an organization involves its **employees** in improving organizational **effectiveness** in the **accomplishment** of organization's mission and goals.

The Challenge



PERFORMANCE & ENGAGEMENT REALITIES

Employees expect to be **heard**.



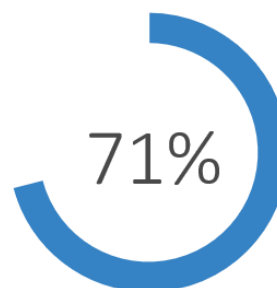
of exited employees believed their opinion was NOT valued

Employees expect to be **coached**.



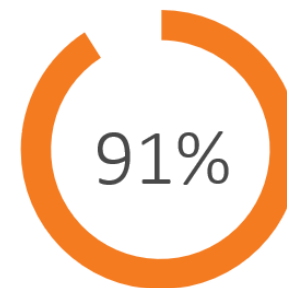
of disengaged organizations leverage a traditional performance review

Employees expect **real-time feedback**.



of employees prefer immediate feedback even if it's negative

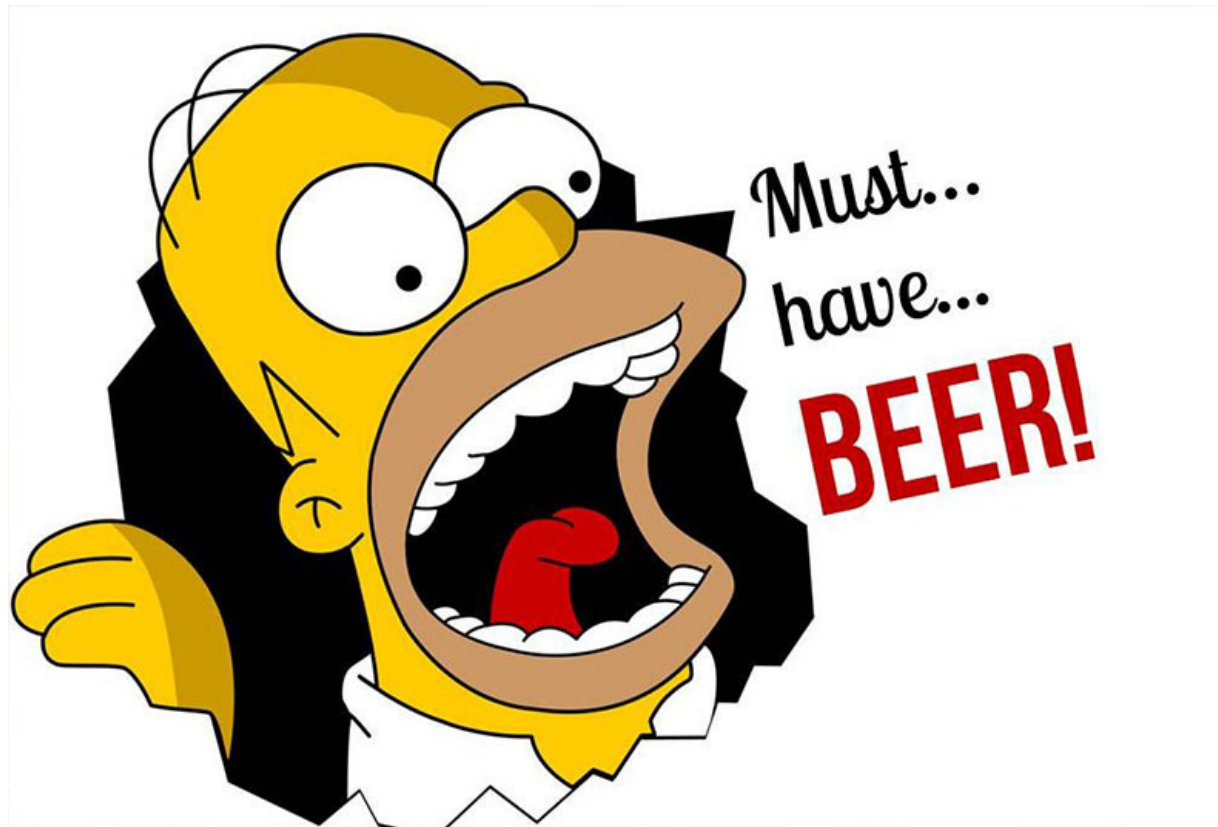
Employees expect to **meet regularly**.



of employees prefer to discuss their performance more than once a year



Response to Problem



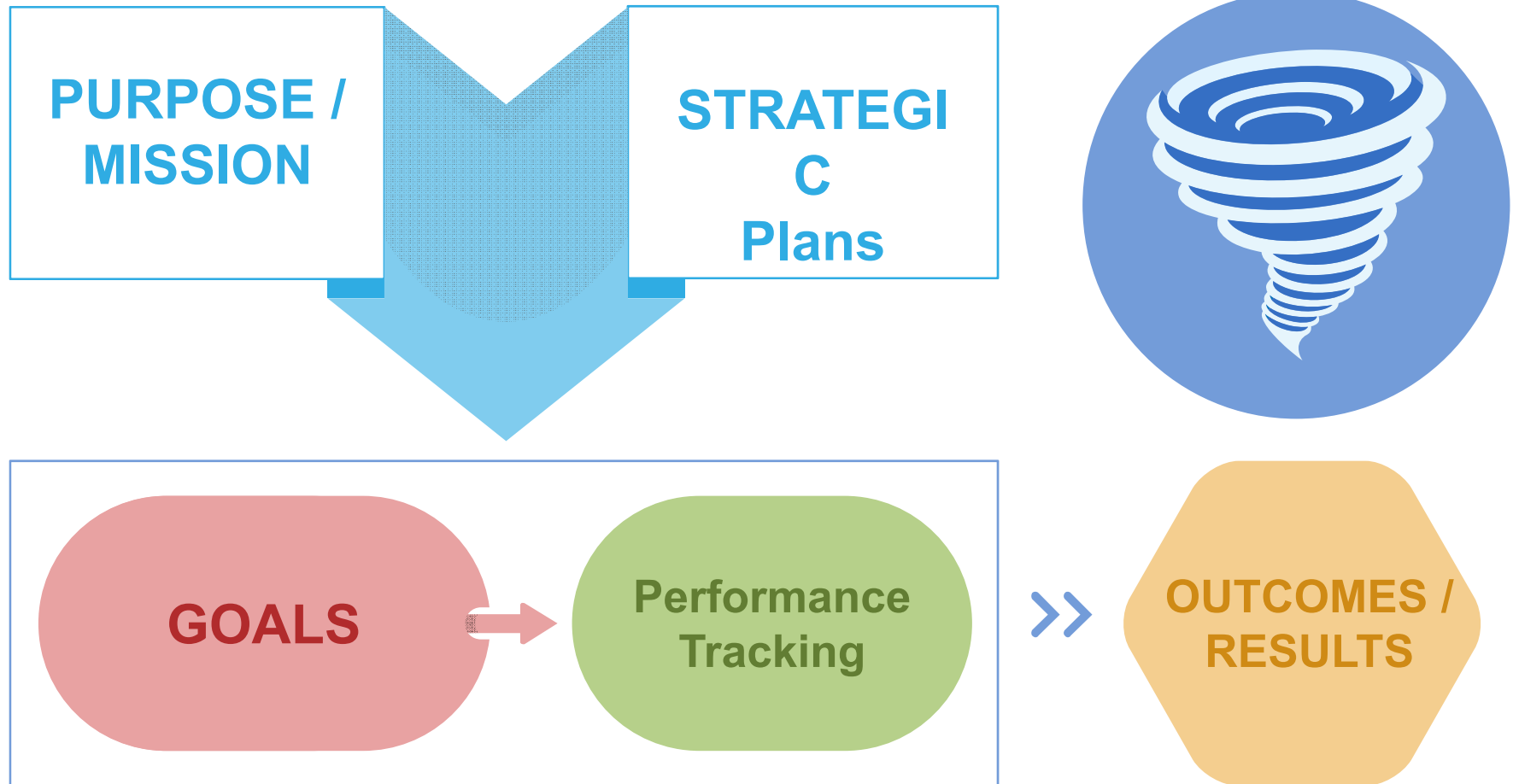
The Underlying Challenge

“Ideas are easy.
Execution is the
hard part.”

– Andy Grove, Former
Chairman of Intel Corp.

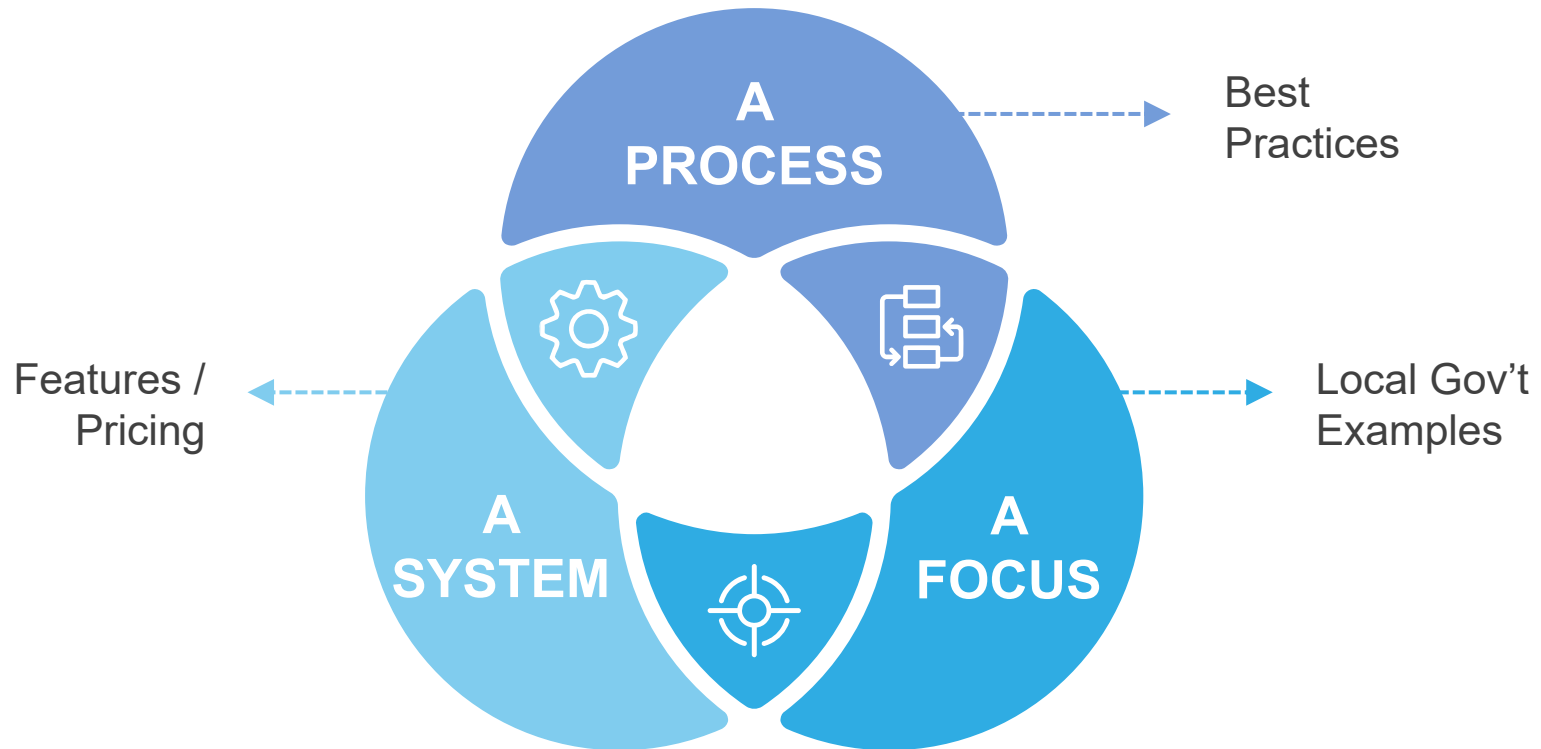


EXECUTION ROADMAP



TODAY'S TALK

PERFORMANCE MANAGEMENT



OKR Methodology



Discipline or process
for setting, clarifying,
measuring,
communicating,
tracking and
rewarding key goal
attainment

Local Governments are Adopting Performance Management to Improve Execution

Fulton County, GA
Decatur, GA
Clayton County, GA
Milton GA
East Point GA
Fayetteville, GA
Stockbridge, GA
Rockdale County, GA
Scottsdale, AZ
Peoria IL
Tempe AZ

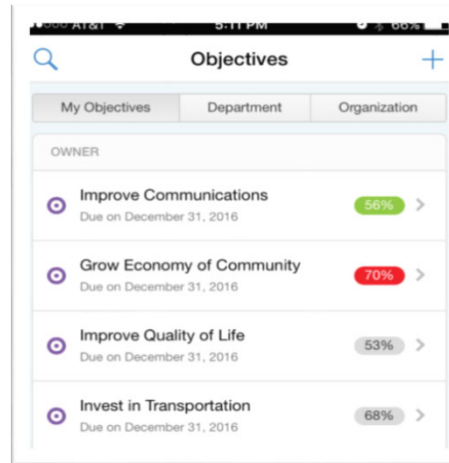


Ft. Lauderdale, FL
Arvada
Ft. Collins, CO
Durham, NC
Charlottesville, VA
Olathe, KS
San Bernardino County, CA
Seattle, WA
College Park, MD
Sahuarita, AZ

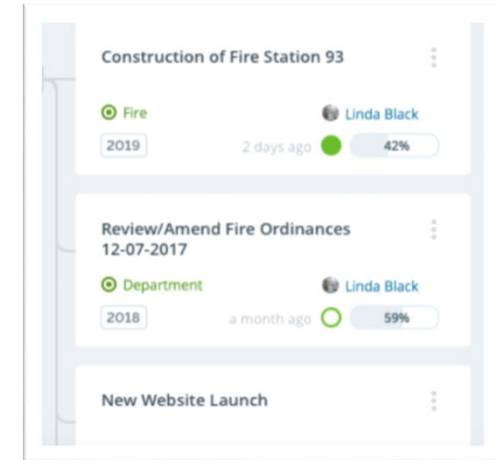
Today's Strategic Performance Management



Visual



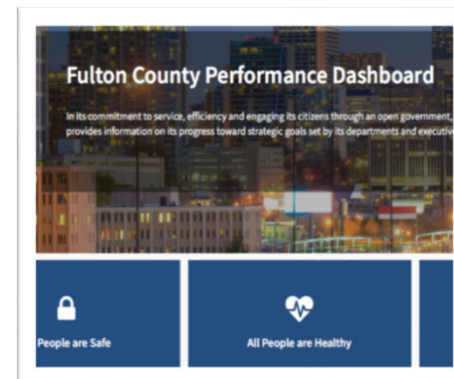
Easy to Use



Goal Alignment



Affordable



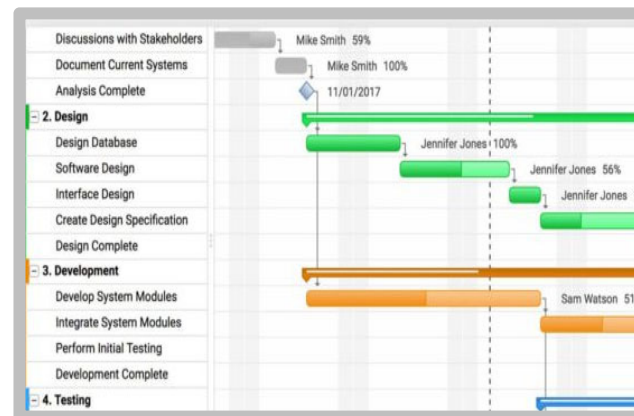
Publicly Visible

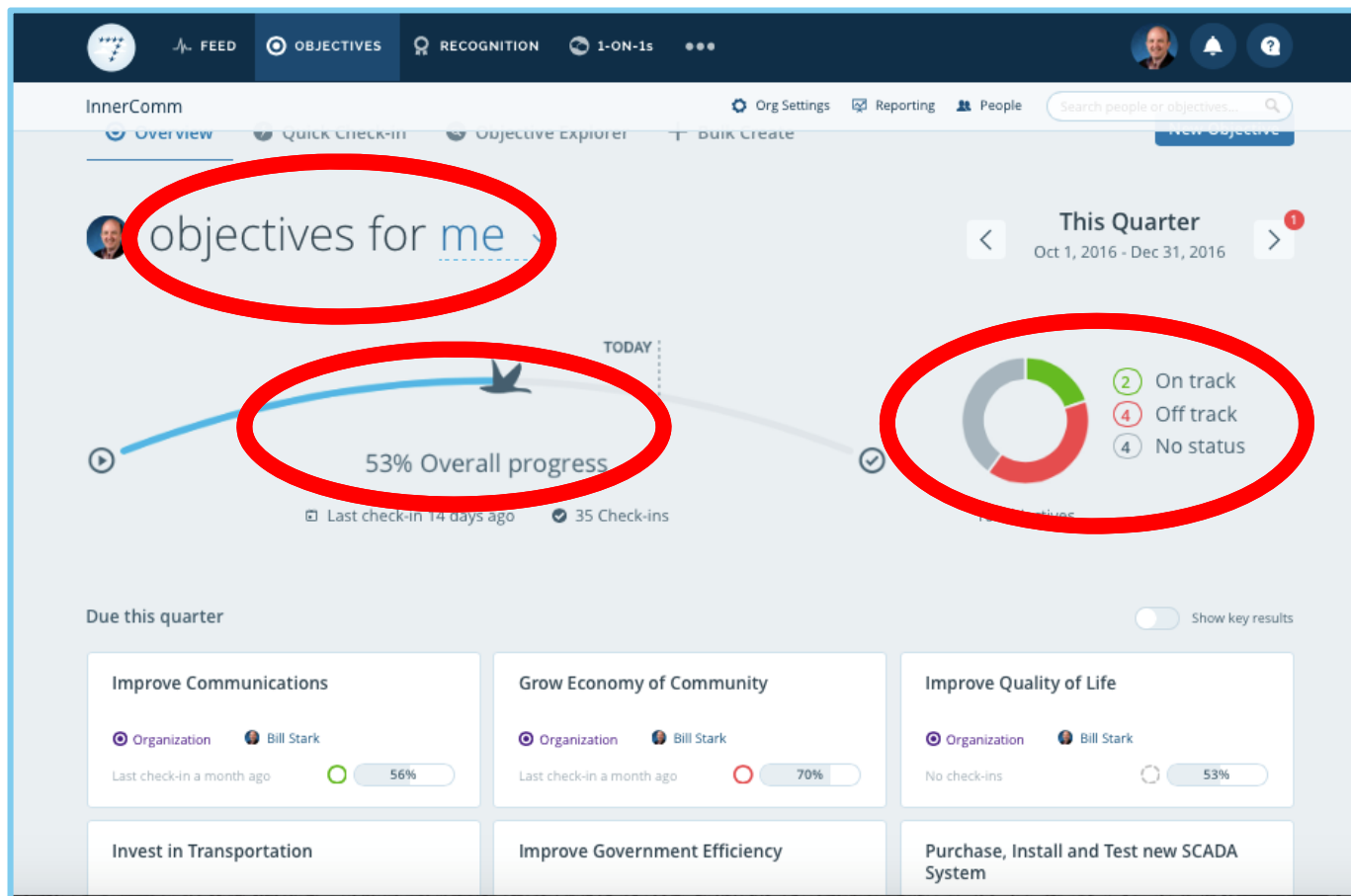
What we're not talking about...

HR-IS System

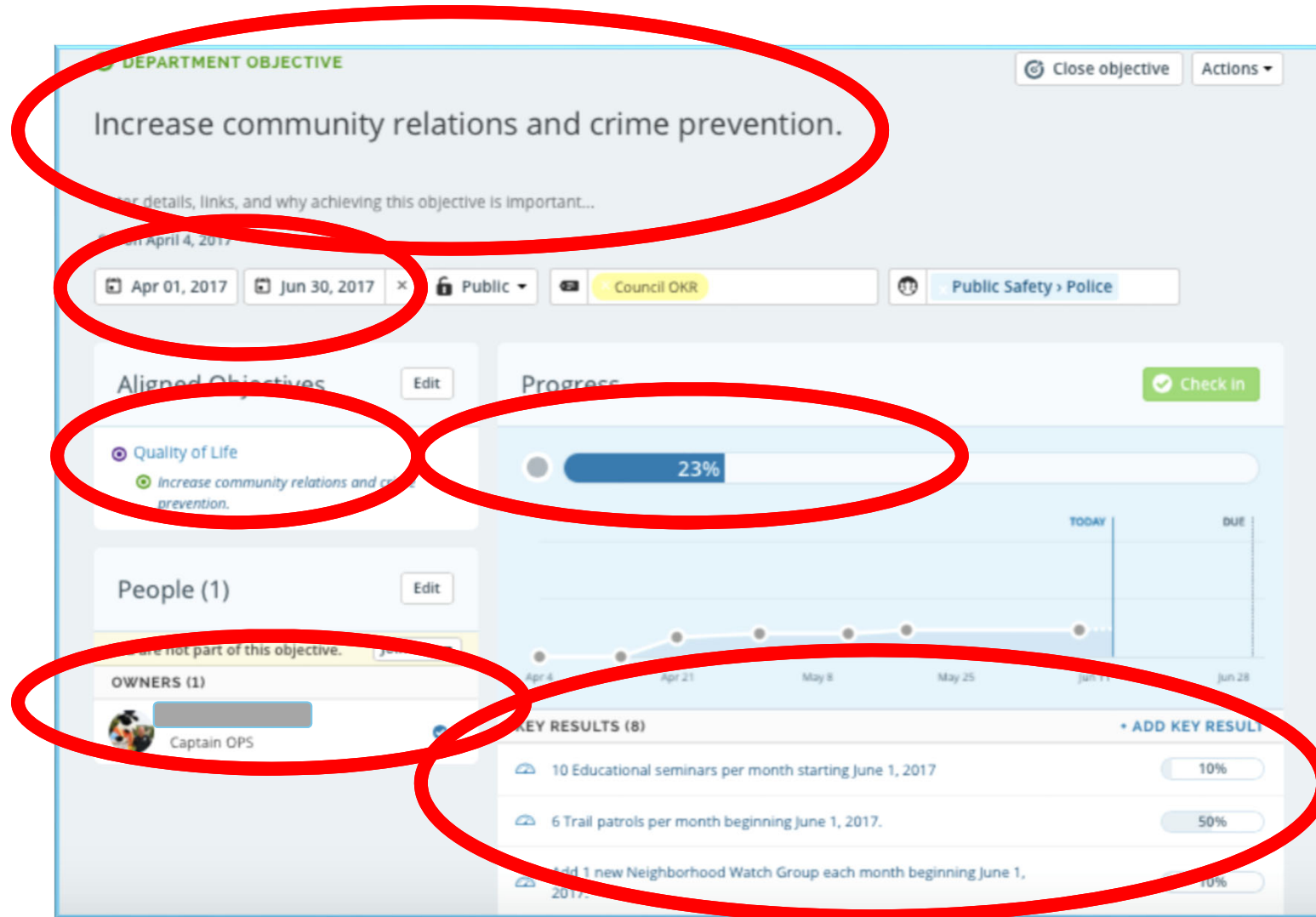


Project
Management
Software





Police Department Example



Strategic Goals & Department Goals

ORGANIZATION OBJECTIVE

Invest in Infrastructure - 2018

Enter details about this objective and why achieving this objective is important...

Set on February 12, 2018

Jan 01, 2018 Dec 31, 2018 × Public Type a label name...

Aligned Objectives

- Invest in Infrastructure - 2018
 - Develop Citywide Fiber Plan
 - Construction of Fire Station 93
 - City Hall project
 - DDA Alleyway Project
 - 2018 SPLOST Paving Project
 - properly fund and staff the police department
 - Offer VIP experience at Southern Ground Amphitheater
 - City Hall project
 - DDA Alleyway Project
 - In-fill development at Levee Property

Progress

Remind me to check in every Friday ☒ Check in

62%

KEY RESULTS (0)

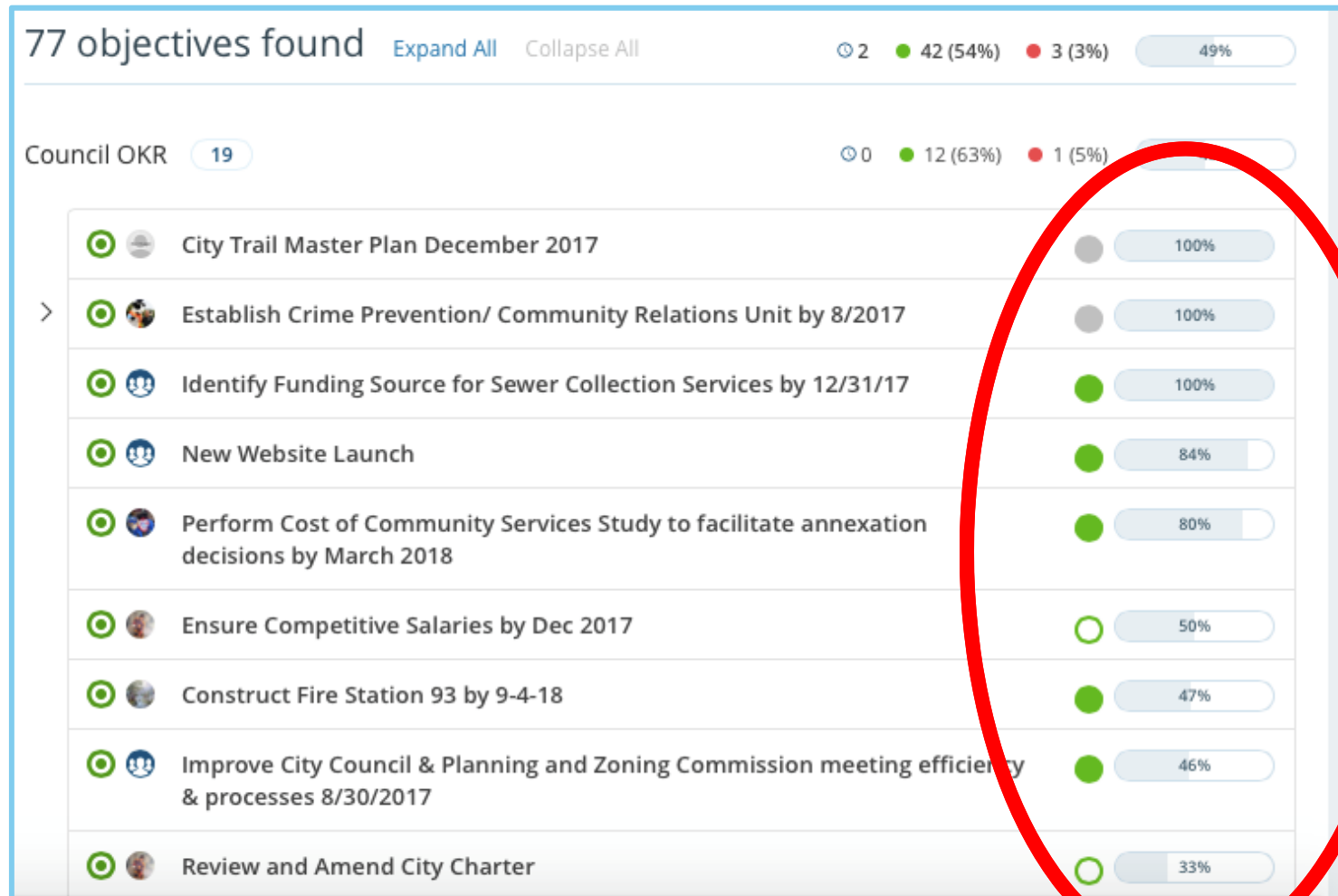
+ ADD KEY RESULT

CHILD OBJECTIVES (15)

+ ADD CHILD OBJECTIVE

10%	Develop Citywide Fiber Plan
43%	Construction of Fire Station 93 Council OKR
89%	City Hall project Strategic Focus Area
39%	DDA Alleyway Project

Reporting Example



Uses for OKRs



Projects

Improve Playground
Equipment



Outcomes

Safer Community:
Reduce Crime 6%

Recognize Employee Successes

The screenshot displays the 'recognition center' interface. On the left, a 'Recognition filters' sidebar is circled in red, showing 'CORE VALUES' with counts: Excellence (19), Passion (6), Teamwork (6), Taking Initiative (3), and Excellent Customer Service (0). The main area features two summary cards: 'TOTAL RECOGNITION 34' and 'MOST RECOGNIZED 2 People (5)'. Below these are three recognition cards. The first card for Nella Cooper is circled in red and includes a testimonial from Carleetha Talmadge. The second card for Mike Bush is also circled in red and includes a testimonial from Carleetha Talmadge. The third card for Mike Bush includes a testimonial from Ray Gibson. A green button 'Recognize a team member' is in the top right. At the bottom left, there are links for 'TV Display Mode' and 'Export history as Excel'.

recognition center

Recognize a team member

Recognition filters

Everybody All Time

CORE VALUES

- Excellence 19
- Passion 6
- Teamwork 6
- Taking Initiative 3
- Excellent Customer Service 0

TV Display Mode

Export history as Excel

TOTAL RECOGNITION 34

MOST RECOGNIZED 2 People (5)

Nella Cooper

WAS RECOGNIZED FOR EXCELLENCE

BY CARLEETHA TALMADGE FOR:

"It is Nella's 1 year anniversary! Thanks for all that you do! I know that your plate was full during this first year but I am so grateful that have stayed the course!"

Like · 5 months ago

Mike Bush

WAS RECOGNIZED FOR EXCELLENCE

BY CARLEETHA TALMADGE FOR:

"I would like to recognize Mike Bush for making it happen (Opening up the Doors of City Hall) and also for hanging the pictures on the wall! Awesome Job"

Like · 7 months ago

Mike Bush

WAS RECOGNIZED FOR EXCELLENCE


BY RAY GIBSON FOR:

"Great work in receiving the Certificate of Achievement for Excellence in Financial Reporting."


Like · 2 likes · a year ago

Write a comment...

1-on-1 and 360 Reviews / Feedback

 1-on-1s







1-on-1 History

INVOLVING:  Bill Stark


☐ AS TEAM MEMBER ☐ AS FACILITATOR


[Show more options](#)

DRAFT 1-ON-1s


 Ray Gibson Monthly Performance & OKR Coaching Questions - May Fayettevl...	 May 3, 2017
 Kelvin Joiner Monthly Performance & OKR Coaching Questions - May Fayettevl...	 May 3, 2017
 Scott Gray Monthly Performance & OKR Coaching Questions - May Fayettevl...	 May 3, 2017

Begin a new 1-on-1

 [How to run a more authentic and effective 1-on-1 meeting](#)

PARTICIPANTS  Bill Stark

Facilitator - often asks the questions Participant - often answers the questions

TEMPLATE  Start without a template

WHEN

☐ Recurring

[Prep new 1-on-1](#)

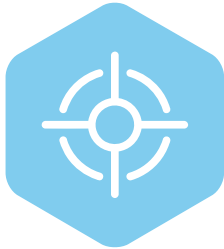
Performance Management Systems to Explore

Name	Cost
7Geese	\$3k yr / \$150 per person/yr; 20 person min
Quantum WorkPlace	\$16k for 150 employees / \$9 PPPM
HelloTeam	\$72-\$96 / YRPP / \$6-\$8 PPPM
WeekDone	\$10,800 150 employees; \$1,920, 20 users \$8 PPPM
ClearPoint Strategy	\$600 / yr / pp; 20 users ~\$12k
Monday	25 users/ \$3,600 yr
Envisio	\$15k-\$20k / med-sized town

Other systems include AchieveIT! and Socrata

Best Practices

BEST PRACTICES FOR PERFORMANCE MANAGEMENT



3-4

per Qtr per team



Weekly
Reviews



60/40

Goal Agreement



Set Stretch Goals
where 70% is a win



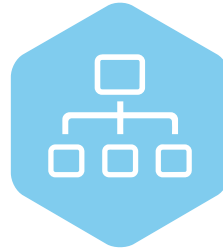
Visible
Scorecard

Not a performance weapons / OKRs are Negotiated with Manager

BEST PRACTICES FOR PERFORMANCE MANAGEMENT



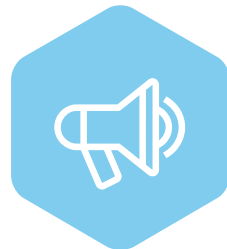
Start with a simple system



Start with Directors then Managers Later



Commit to Leading the Effort



Promote Goals and Progress



Set New OKRs Qtrly with Feedback

Not a performance weapons / OKRs are Negotiated with Manager



Younger Workforce

- Data driven
- Like apps
- Appreciate recognition
- Want to know where they stand
- Seek purpose
- Want feedback

Focus / Results



Issues

- Caught in the daily whirlwind
- No team clarity / detail of goals
- No alignment to City vision
- Lack of goal review cadence
- Few measurements / KPIs
- “Silo” efforts / lack teamwork

Actions

- Adopted & trained on system
- Developed Clear Goals
- Refined vision, mission, values
- Established quarterly goal reviews
- Review OKRs in staff meetings
- Share with Council & public



Results

Greater clarity & team communication

Issues identified early

Faster progress to key goals

Council and public better informed

High performance culture emerging

Accountability growing

More urgency

The Hard Part

- Getting people to use the process
- Change / Changing behavior
- Making it stick
- Fighting the tide to “return to the norm”

TIME & COMMITTMENT

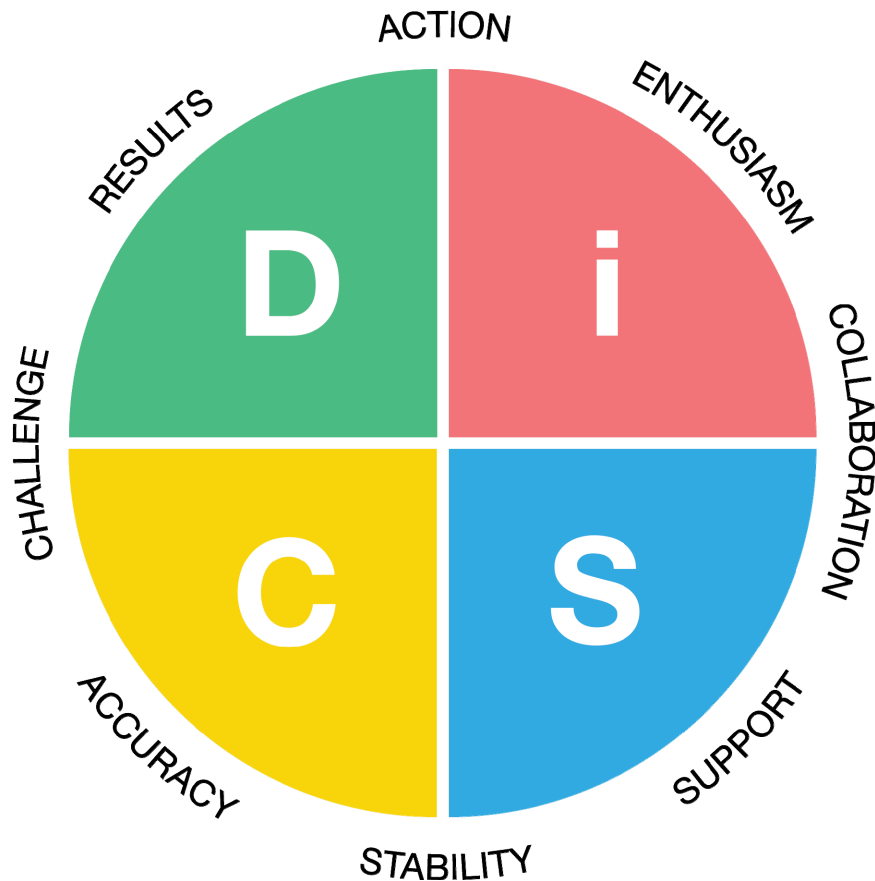
Teamwork Development in Local Government

Teamwork in Local Government

- ▶ 30%+ of a day is spent in a team setting
- ▶ 50% of work is done in a team situation
- ▶ 70%+ of local government operating budget is people

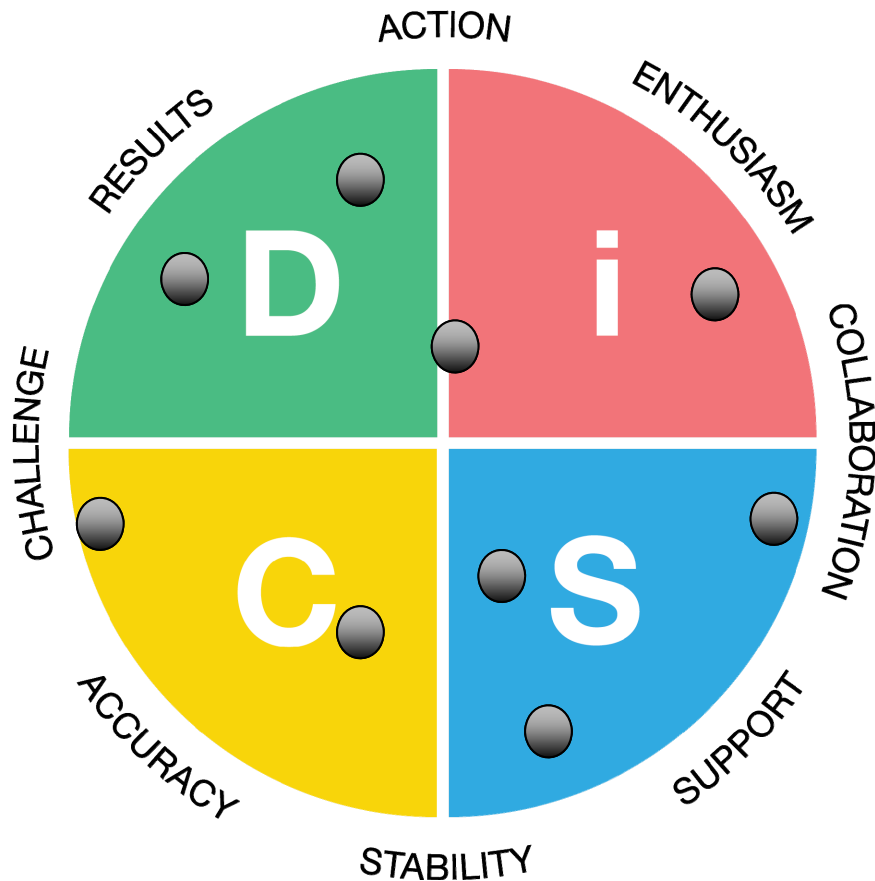


The Power of DiSC®



- Based on decades of research, DiSC helps people understand how they collaborate in a team environment and how their work style affects others.
- People score into one of 4 main categories or one of 12 variations.

The Power of DiSC®



- DiSC assessments allow you to see how you relate to others
- DiSC assessments help others know how to best relate to you to get the maximum results for a team
- The assessment is reliably used over 1,000,000 times per year by government, business and non-profits



The Five Behaviors™ Model

Building Trust

Confidence among team members that their peers' intentions are good and that there is no reason to be protective or careful around the group.

Trust allows us to say:

I'm sorry
I made a mistake
That was my fault
I need help

*In essence, teammates must get comfortable
being vulnerable with one another.*



Turn to your neighbor and share the biggest factor in your childhood that contributed to your success in life.



The Five Behaviors™ Model

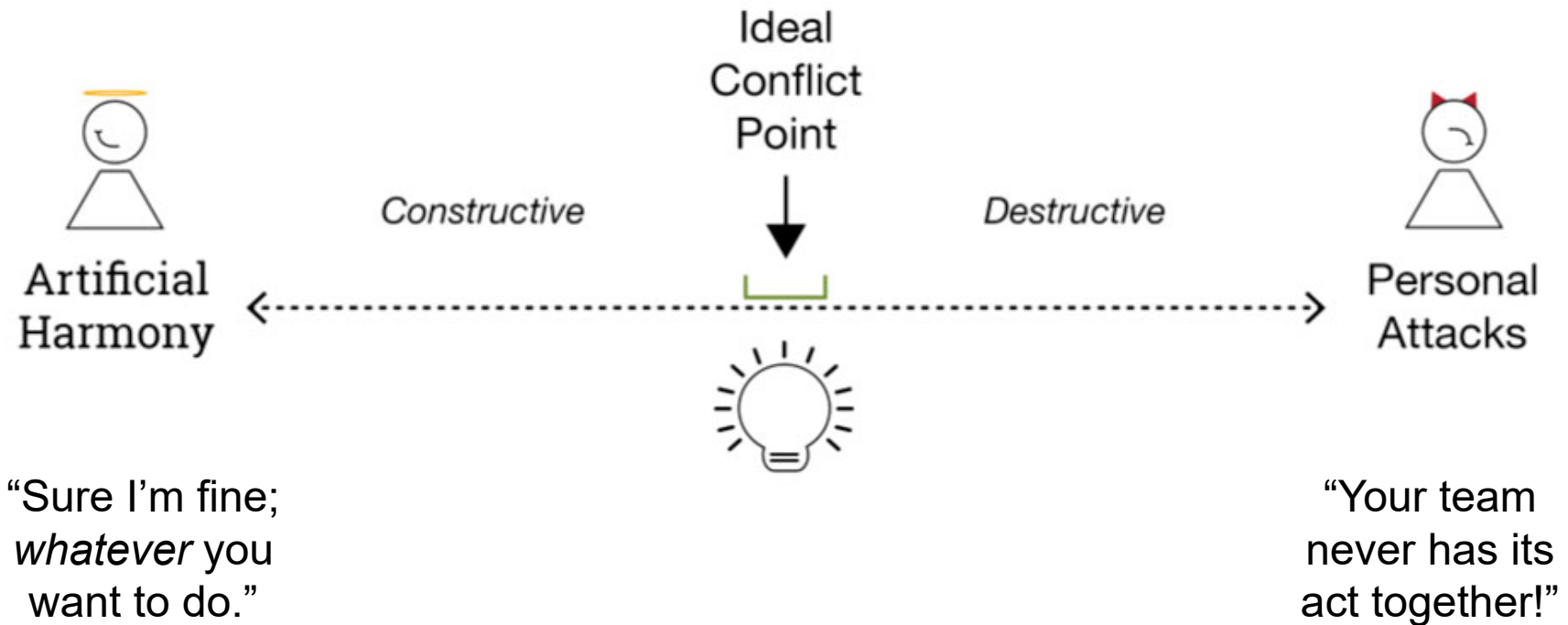
Mastering Conflict

Requiring passionate, unfiltered debate around issues of importance to the team in order to arrive at the best solution.

Productive conflict moves the team forward
Should focus on the idea, not the person

Mastering Conflict

Conflict Continuum



Styles Response to Conflict

D Style

- Speaks up - H
- Overpowers - U

S Style

- Listens to others - H
- Avoids tension - U

I Style

- Expresses Feelings - H
- Overly dramatic - U

C Style

- Focuses on logic - H
- Overpowers w/ facts - U



The Five Behaviors™ Model

A swimmer is shown in a pool, performing a stroke. The background is a dark, moody photograph of water. Overlaid on the image is a large, white, sans-serif quote.

**WITHOUT
COMMITMENT,
NOTHING
HAPPENS.**

– T.D. Jakes

Achieving Commitment

- Sharing opinions leads to commitment
- Clarity and buy-in are key to commitment
- D & I tendency is to move fast and not gain commitment

Commitment Best Practice



Always ask each team member if they are totally committed to the goal or decision you have just made....even if they do not agree with it all.



The Five Behaviors™ Model

Embracing Accountability

The willingness of team members to remind one another when they are not living up to the performance standards of the group.

Peer-to-peer accountability

Doesn't always require the participation of the team leader

Requires trust of the other person or hurt feelings result

Embracing Accountability

When everyone is committed to a clear plan of action, they are better able to hold one another accountable

“Hey, John, remember, we all agreed to...”



The Five Behaviors™ Model

Focusing on Results

Team members go beyond barter and compromise to focus on and embrace a collective pursuit of the best interests of the whole.

Distractions of Focusing on Team Goals

Ego (“this is beneath me!!”)

Personal Goals

Compensation (*“I’m not paid to do that!”*)

My Department Goals

I’m not truly committed

Thank you!

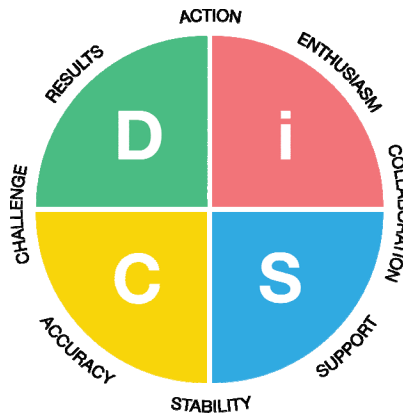
Questions?

www.innercomm.net

bstark@innercomm.net

tfenbert@innercomm.net

Implementation of Five Behaviors



5 Behaviors DiSC
Assessment



Monthly Training on One of the Five
Behaviors



Online Learning



Coaching



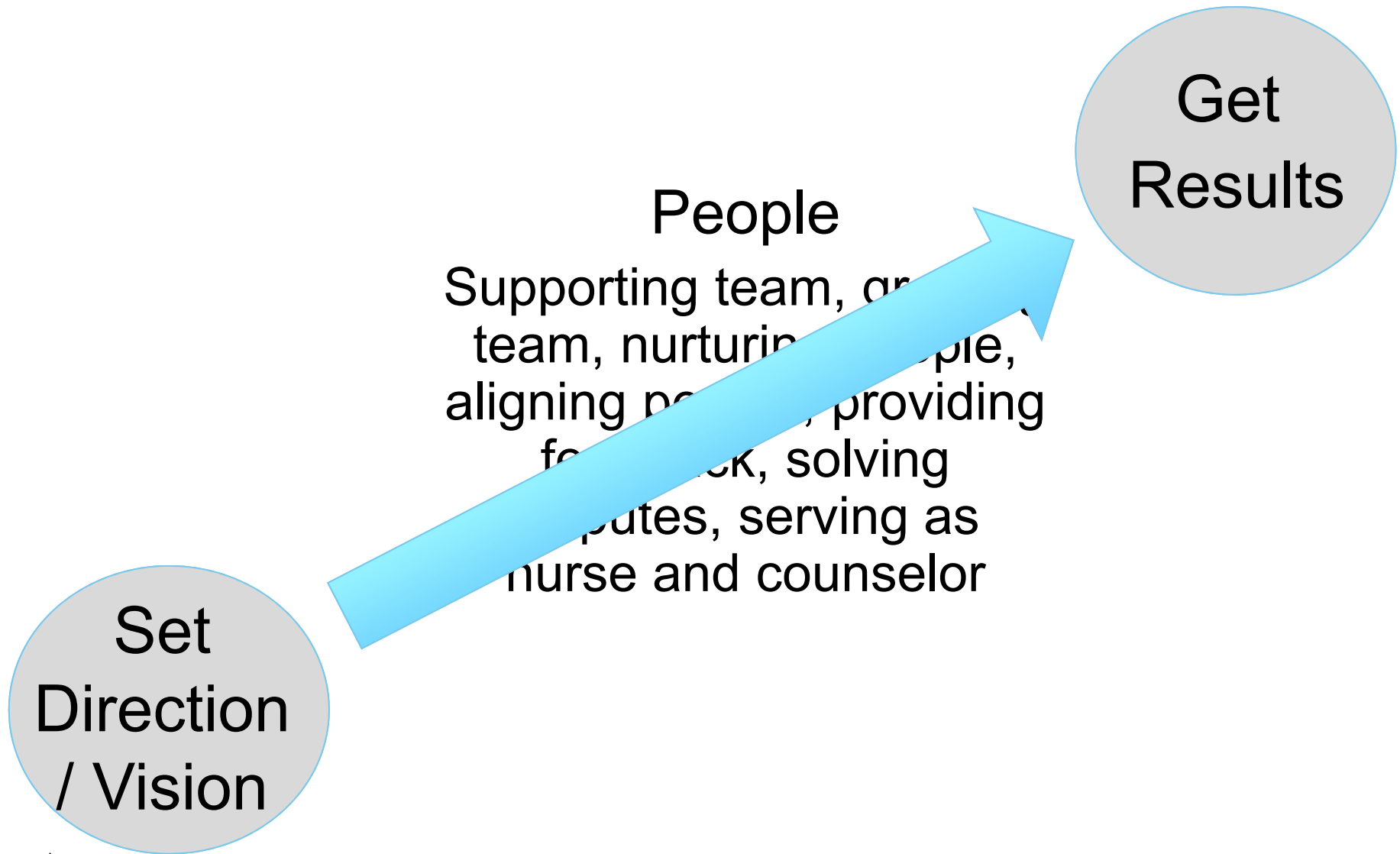
6-month Check-up

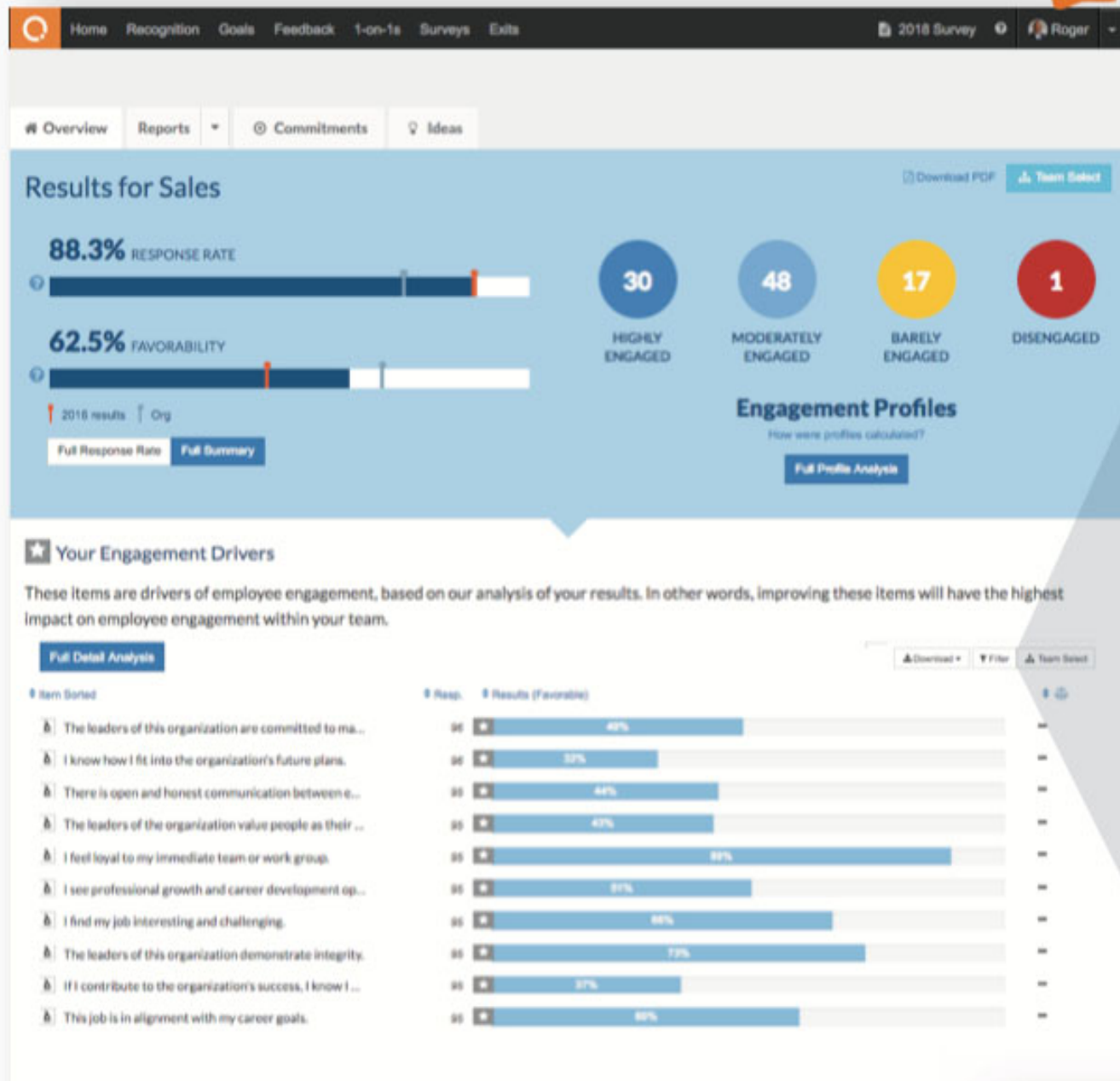




Turn to your
neighbor and
share the
biggest
professional
mistake you
made last year.

Leadership





Intuitive manage dashboard

Home
Recognition
Goals
Feedback
1-on-1s
Surveys
Exits

Roger

DEPARTMENT GOAL
More
Close & Archive
Post an Update

Accelerate recurring revenue growth this quarter

Add details about this goal and why it matters...

Public
5/24/2018
8 People
Department: Sales
Department: Technology

Goal Progress

65%

KEY RESULTS

\$1.11M / \$2M

Deliver \$2M in subscription revenues

\$10 / \$14

Get revenue-per-user to \$14

2 / 3

Hire 3 new inside sales people

Post an Update
Give Recognition

What progress have you made on this goal?

You posted an update to **Accelerate recurring revenue growth this quarter (65% Complete)**

Deliver \$2M in subscription revenues increased to \$1,112,000 / \$2,000,000 **(+\$167,000)**

Get revenue-per-user to \$14 decreased to \$10 / \$14 **(-\$1.5)**

5 Days Ago

Avg Price-per-user dipped this week to \$10. We believe this is a short-term trend related to Holiday promotion pricing.

Tracy Truman posted an update to **Accelerate recurring revenue growth this quarter (65% Complete)**

Hire 3 new inside sales people increased to 2 / 3 **(+1)**

2 Weeks Ago

We hired a new sales rep in Pasadena, CA for the Western Region

Tracking

Due in 30 days

Aligned Goals

- Achieve \$150 million in total company revenue this ye...
- Accelerate recurring revenue growth this quarter
- Attain a 96% renewal rate on current client list of ...
- Attain 50 million in revenue
- Lead 5 product demos per week
- Model X performance at launch equivalent to our ...

People

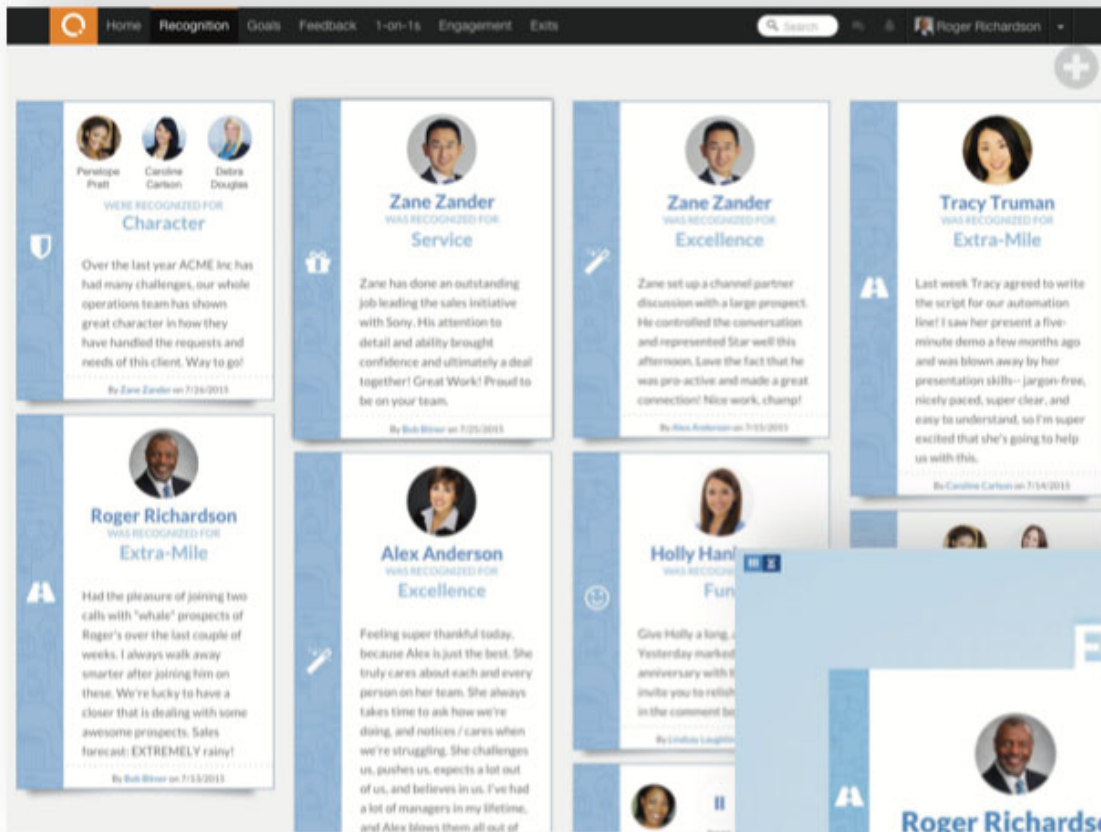
OWNER

Roger Richardson
VP of Sales

CONTRIBUTORS (3)

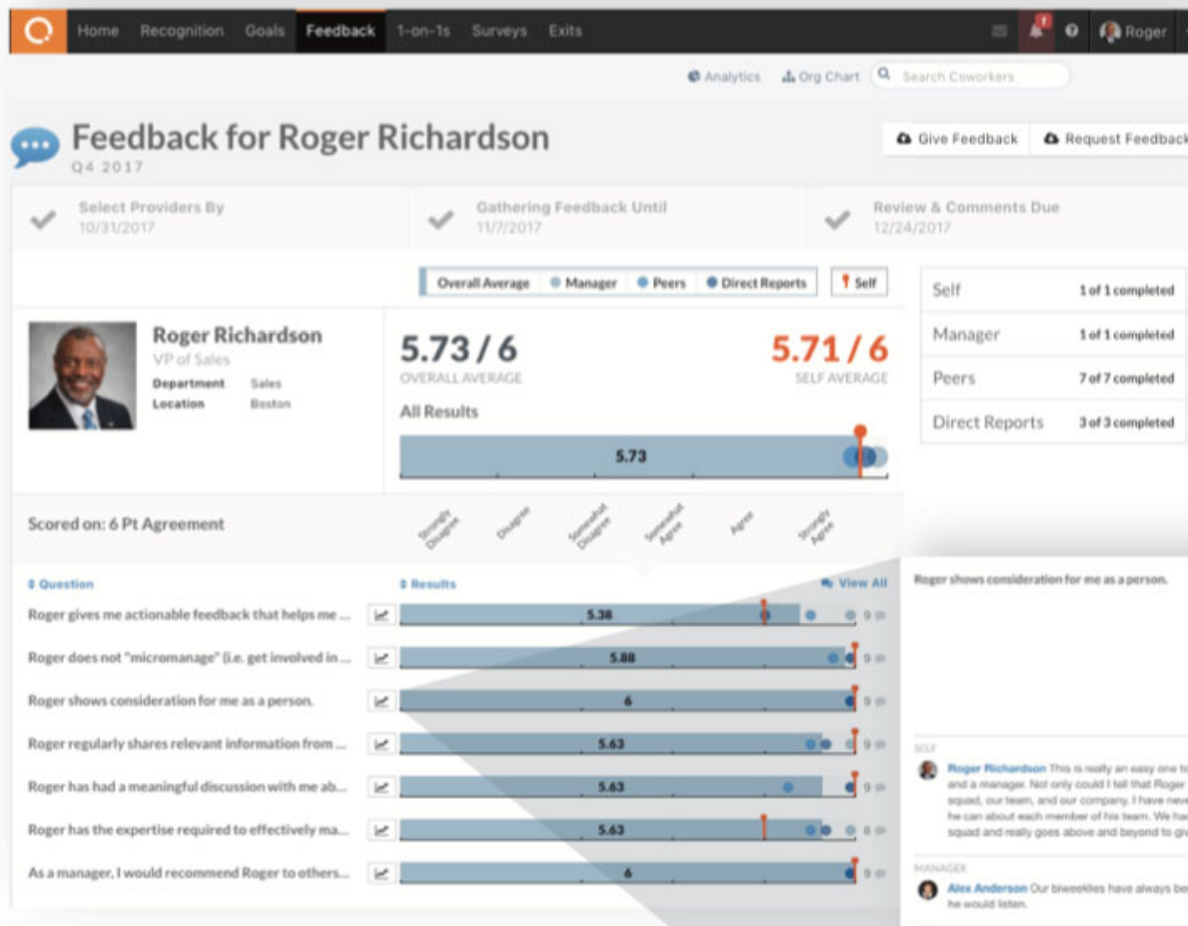
Sammy Sonaz
Regional Sales Manager

Tracy Truman
Regional Sales Manager



Static or rotating public
recognition display board





Request or give feedback anytime



Trending feedback and open-ended items



Home
Recognition
Goals
Feedback
1-on-1s
Surveys

April 26 at 9:00 AM
Scheduled Date

1-on-1 for 2018 Q1
Title

Actions

Zane Zander
Regional Sales Manager

Shared
Recent Activity

Roger Richardson
VP of Sales

Send Nudge
Not Started

STEP 1: PREPARE & SHARE

STEP 2: TALK!

STEP 3: FINALIZE 1-ON-1

Employee Shares
Due: 4/23/2018

Facilitator Shares
Due: 4/24/2018

Meet 1-on-1, then add comments

Employee Finalizes
Due: 4/29/2018

Facilitator Finalizes
Due: 4/30/2018

Thanks for sharing your responses

You'll receive a notification email when Roger shares.

Unshare & Edit

What do you see as your biggest accomplishments in Q1?

Since I'm forced to use Salesforce everyday and we're now held accountable to use it, I feel I've conquered this goal. Still a lot to learn but I feel that will come with time. I definitely see the value in SF and have learned to like it to stay organized. Last quarter I was also worried about time. Which is still an issue. I have a hard time saying no, and most days need to stay late in order to get everything accomplished. It has helped getting international off my plate but with being the Zuora spokesperson for the team, it's hard to predict which days that will keep me busy and away from my day to day tasks.

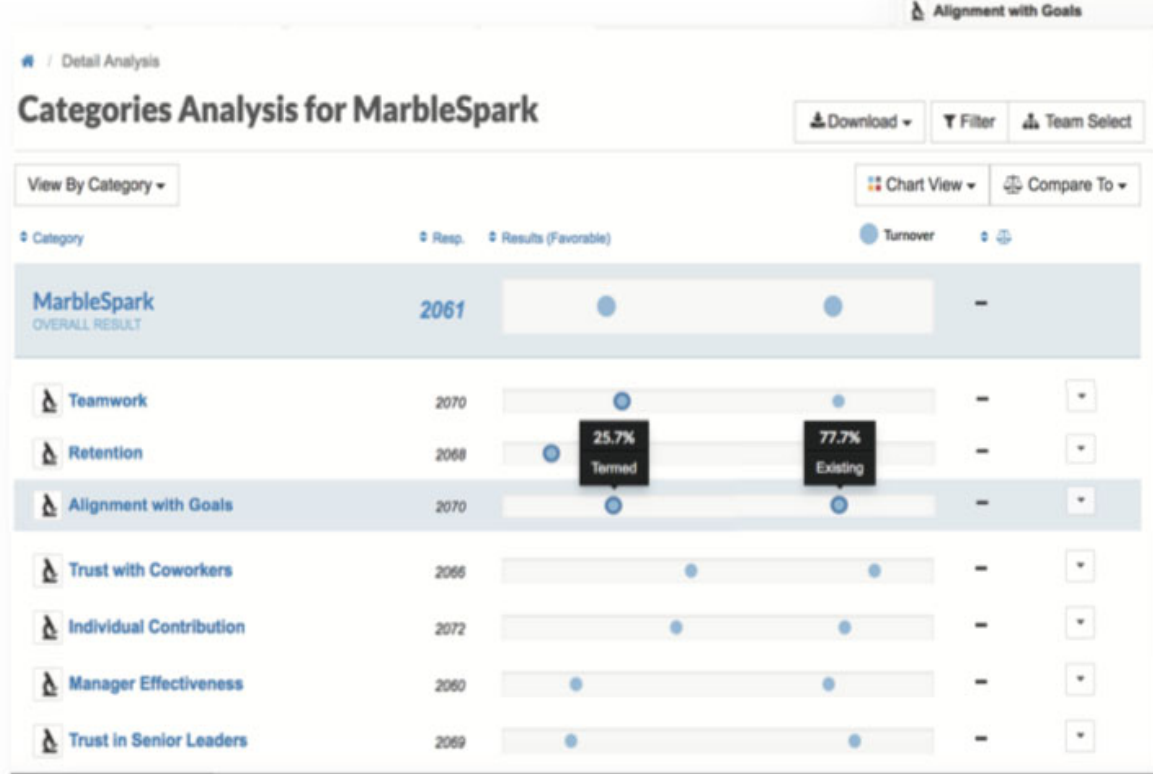
Overall Employee Progress

Overall Manager Progress

Cycle	Status	Employee	Rating	Status	Manager	Rating	View
2015	Nudge 5 employees who haven't started yet		-	Not Started	Alex Anderson	-	View
2015	Nudge 5 employees who haven't shared yet		-	Started	Roger Richardson	-	View
2015	Nudge 5 employees who haven't finalized yet		1	Shared	Roger Richardson	1	View
2015 Q3	Not Started	Test User	-	Not Started	Roger Richardson	-	View
2015 Q3	Not Started	Tracy Truman	-	Not Started	Roger Richardson	-	View
2015 Q3	Not Started	Sammy Sonaz	-	Not Started	Roger Richardson	-	View
2015 Q3	Not Started	Zane Zander	-	Not Started	Roger Richardson	-	View
2015 Q3	Not Started	Roger Richardson	-	Not Started	Alex Anderson	-	View

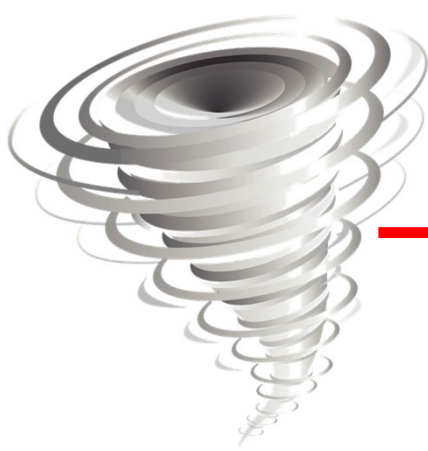
InnerComm

60



		MarbleSpark	Tenure of 1e	Tenure of 1-2	Tenure of 3-4	Tenure of 5-6	Tenure of 7-8	Tenure of 9-10
Teamwork	71.0%	70.6%	70.0%	69.7%	73.5%	72.0%	75.3%	
Retention	68.9%	76.9%	64.2%	63.3%	70.7%	72.9%	75.7%	
Alignment with Goals	70.9%	73.3%	69.6%	66.9%	71.7%	74.6%	78.3%	
	80.6%	76.0%	78.6%	81.7%	83.3%	85.7%	84.6%	
	74.3%	81.9%	72.9%	68.4%	71.6%	78.5%	80.5%	
	68.0%	73.4%	67.6%	64.1%	69.0%	65.7%	71.2%	
	80.6%	76.0%	78.6%	81.7%	83.3%	85.7%	84.6%	
	74.3%	81.9%	72.9%	68.4%	71.6%	78.5%	80.5%	
	68.0%	73.4%	67.6%	64.1%	69.0%	65.7%	71.2%	
	73.1%	79.0%	70.1%	69.5%	70.2%	76.1%	80.7%	
	56.9%	64.5%	53.3%	50.3%	55.6%	61.1%	69.4%	
	76.4%	79.9%	79.3%	72.9%	79.3%	83.7%	85.7%	
	51.1%	54.9%	45.2%	48.3%	56.4%	56.1%	55.2%	
	59.3%	62.8%	59.2%	54.6%	61.1%	62.4%	63.0%	

Competing Interests Limit Progress



The Flurry of
Daily
Activities



Make Progress
on Strategic
Objectives

MBOs versus OKRs

	MBOs	OKRs
Timing	Annual	Quarterly or Monthly
Detail	High Level	Includes Incremental Steps
Target	Usually Self Focused	Team Focused
Inspiration	Sets Bar Low	Sets Bar High
Creator	Management	Individual & Manager



Best Practices of Execution

Focus on the Few

Clearly defined; less is more

Act on Key Results

Critical activities that lead to the goal

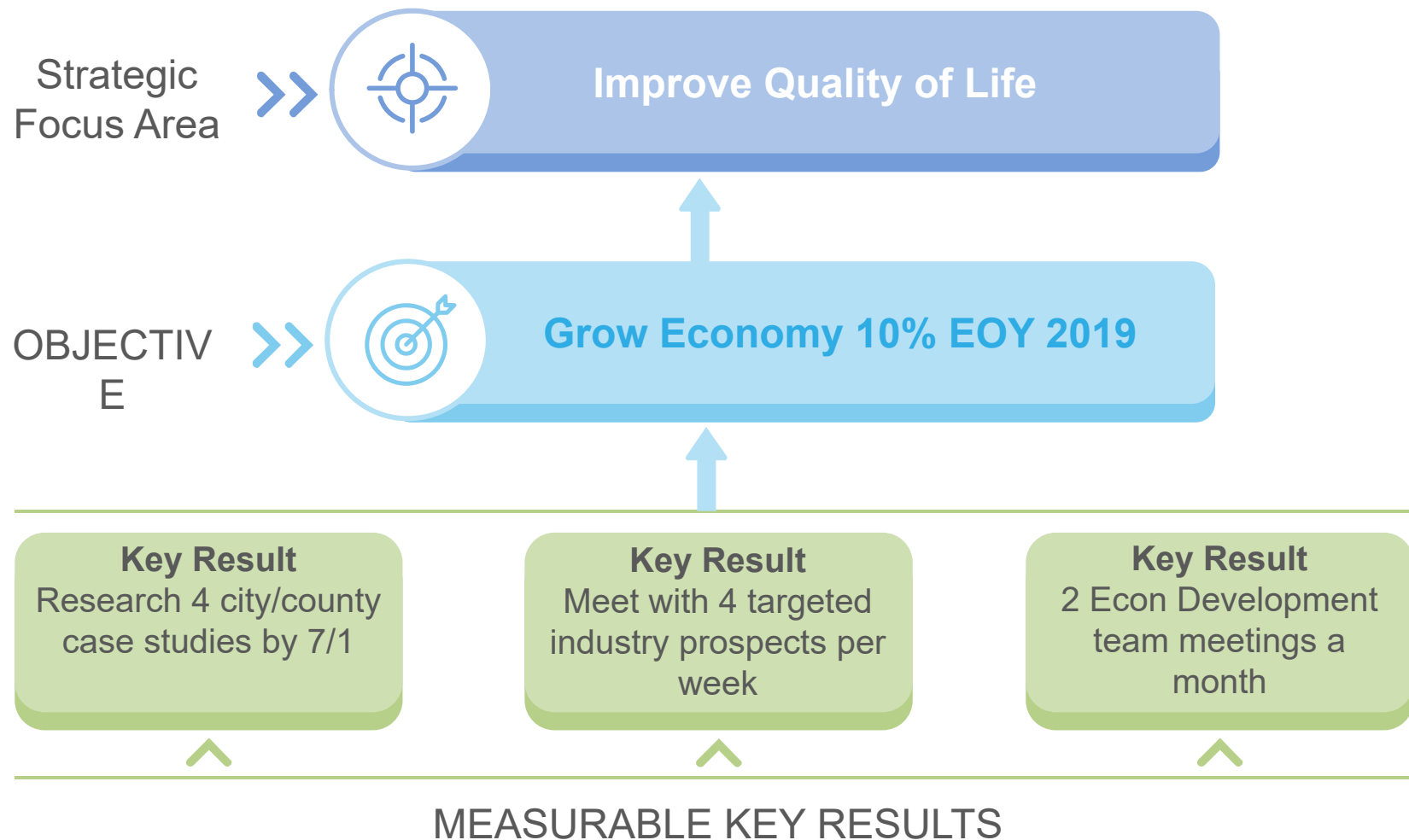
Keep the Goal Visible

Keep a Scorecard

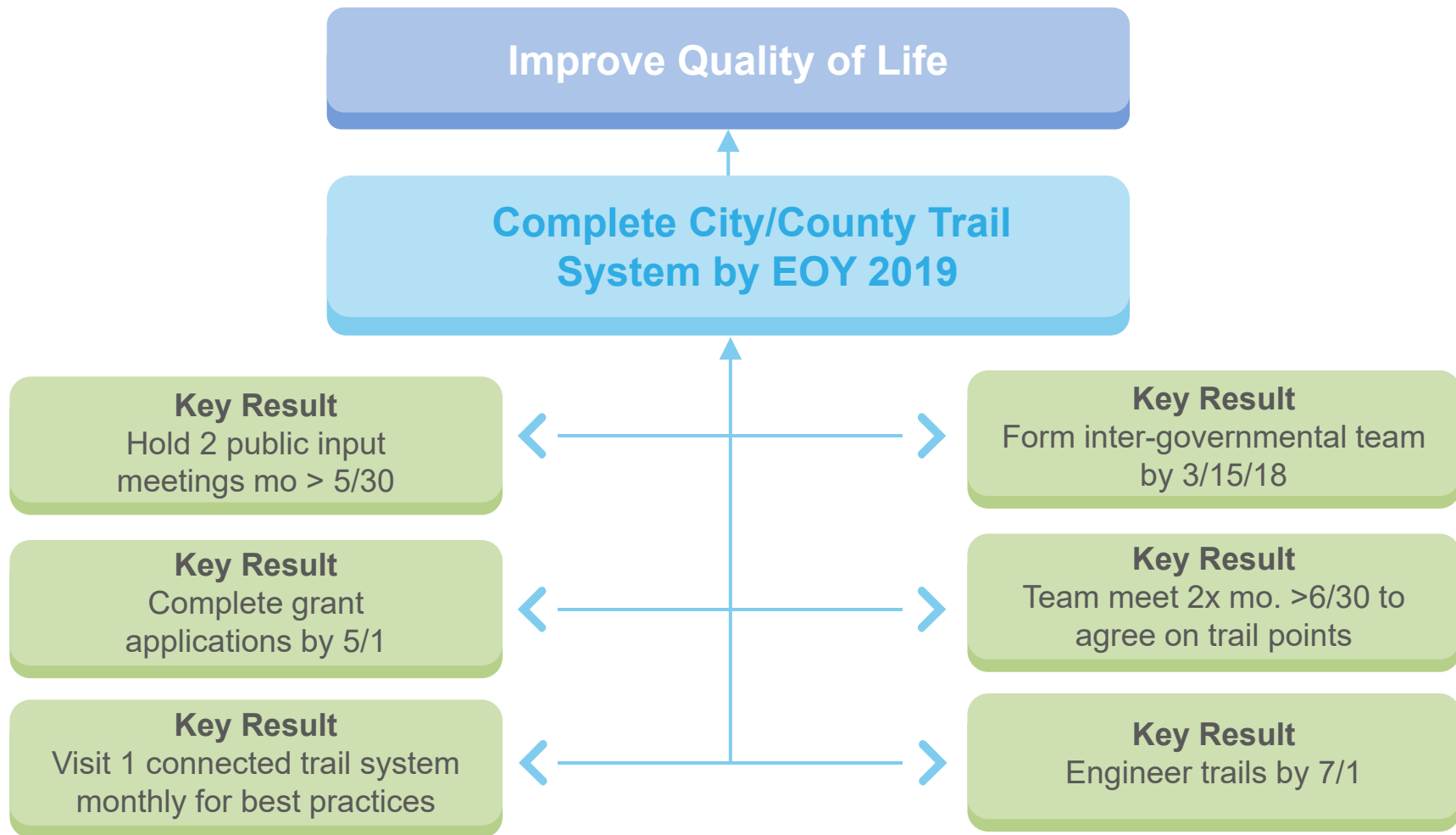
Regularly Meet to Recommit

Regular team meetings to focus on goals, recommit and adjust

LOCAL GOVERNMENT OKR EXAMPLE



LOCAL GOVERNMENT OKR EXAMPLE



LOCAL GOVERNMENT OKR EXAMPLE



OKRs Promote Local Government Success



Focus

Accountability

Urgency

Alignment

Communication

Collaboration

Feedback

Recognition

Growing Resources for Local Government



Leadership is getting important things done through people

Evolution Performance Management

Objectives and Key Results (OKRs)

Online Systems to Track Strategic Performance

Feedback Cycle

Benchmarking


- OpenGov – Links data to strategy
- Quantum – Great places to work survey

The People Factor

Meaning in Work

Goal Alignment

- Organizational Goals (strategic)
- Team Goals (departmental)
- Individual Contributor Goals
- Personal Goals



PERFORMANCE MANAGEMENT SYSTEMS AND TEAMWORK DEVELOPMENT CAN HELP

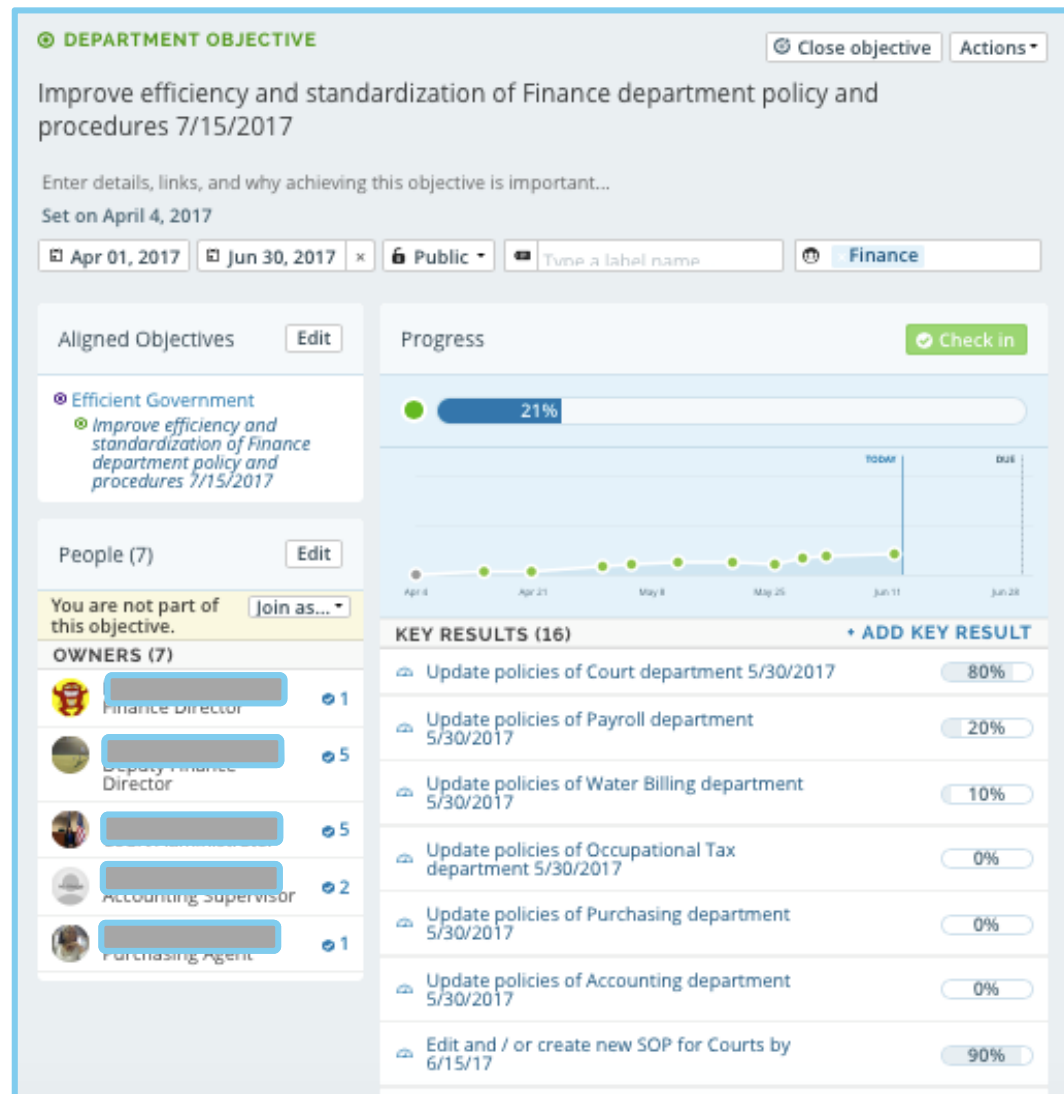
 InnerComm

PERFORMANCE MANAGEMENT DEFINITION

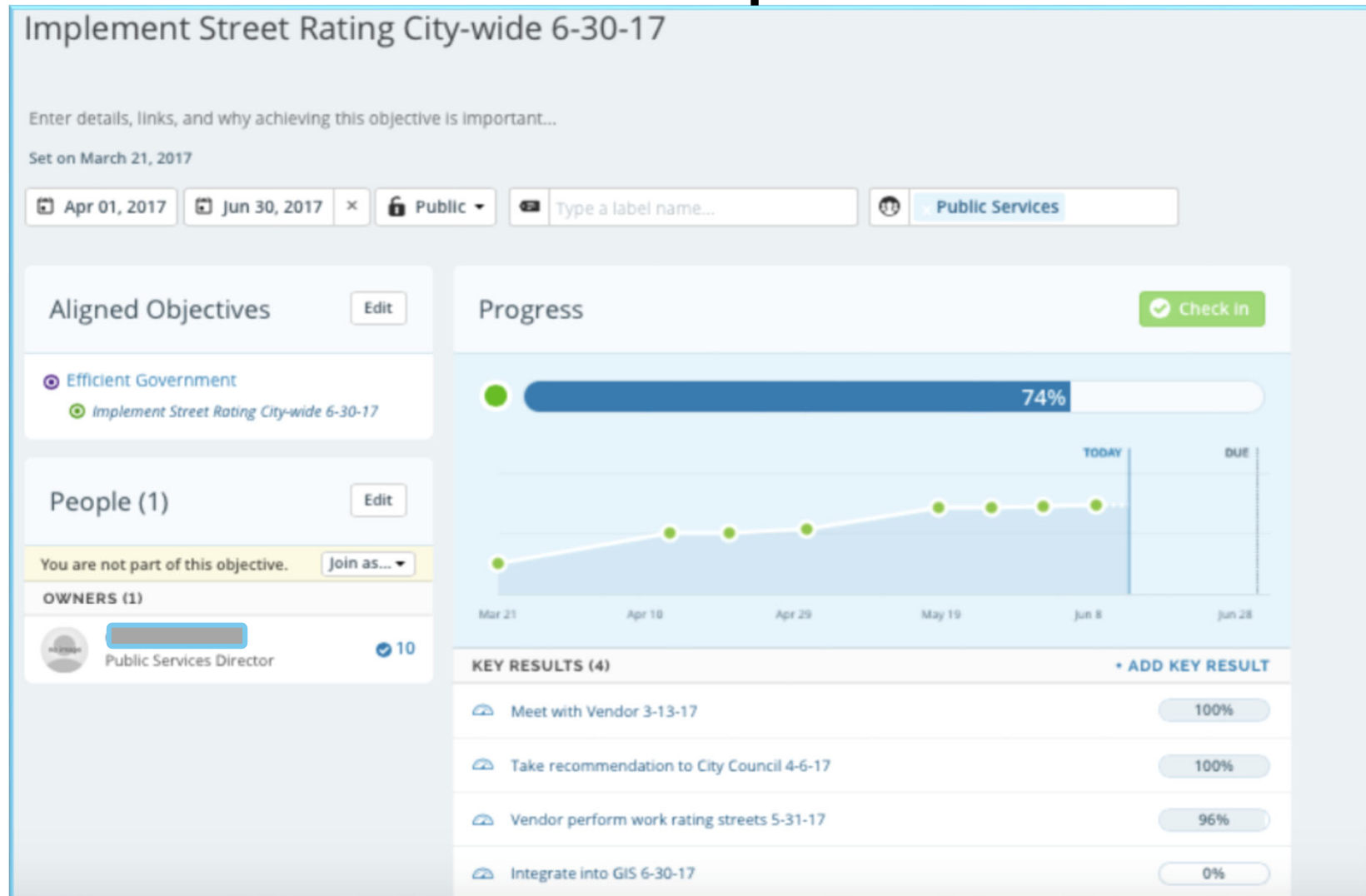
A process to improve organizational effectiveness through people

PERFORMANCE MANAGEMENT	QUESTION IT ANSWERS
Goal Setting	What's the Goal and are we winning?
Goal Alignment	Does my work make a difference?
Performance Tracking	Where do I or we stand?
Performance Recognition	Am I recognized for a good job?
Employee feedback	Am I or are we growing
Team feedback	What's the team input?

Finance Department Example



Public Services Department Example





42%

of employees feel that
their leadership does not
contribute to a positive
company culture.

Courtesy of Officevibe.com



4

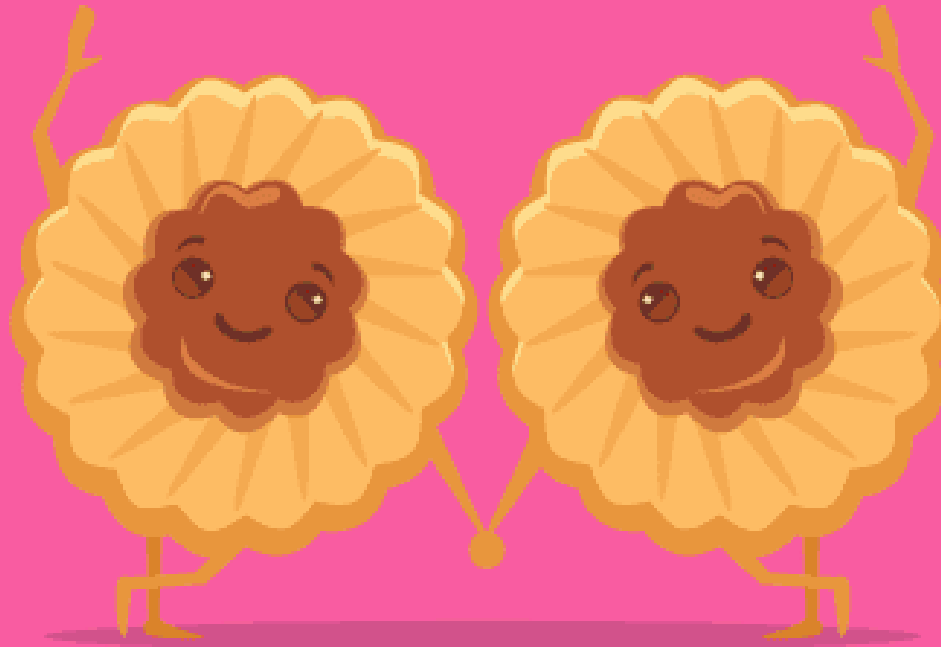
80%

of employees would work
more hours to work for a
more empathetic employer.



9

70% of employees would like to spend more time with their manager.



7

59%

of employees say they
can "grow and develop"
at their organization.



PERFORMANCE & ENGAGEMENT REALITIES



We see a need for....

- Clarity
- Accountability
- Alignment
- Employee feedback
- Focus
- Urgency
- Win/Loss awareness
- Cooperation



We need a way to.....

- Focus on a few important initiatives
- Improve collaboration and communication on major initiatives
- Increase urgency and accountability
- See and recognize success
- Encourage & grow our teams
- Align all our goals to the vision and strategic plan