Developing Employees

Using Berke to Improve Employee Performance

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Table of Contents

INTRODUCTION

As a manager, one of your most important responsibilities is the ongoing assessment of your employees. It's crucial that you regularly look at each team member and ask some vital questions.

- "Where is this person really excelling in his work?"
- "In which parts of the job is he struggling?"
- "How can we leverage his strengths?"
- "What can we do to minimize his weaknesses?"
- And, most importantly, "What are his goals and how can we help him achieve them?"

The answers to all of these form the foundation for an employee development strategy, one that relies on open, honest communication and ensures every individual is growing and excelling in his or her role. The benefits of this type of strategy are apparent, but the path to creating one often is not.

So You've Made a Great Hire. Now What?

There's a tendency among many managers to view the hiring of a new employee as a finish line to cross. "Whew, I'm glad that's done. Now I can get back to work." But in reality, your job with that individual is just beginning, and having your offer accepted is the starting point. No matter how skilled, knowledgeable, or experienced she is, your team member is going to show up the first-day needing support. You'll have to provide the tools she needs to succeed and be prepared to offer ongoing direction and feedback. It's your responsibility to ensure she receives the initial training she needs to get up and running as efficiently as possible.

While ensuring your new hires are thoroughly trained is a big job, it will pay off as you watch them becoming increasingly confident in their roles. How long this process will take varies. Some new hires can be trained in sixty days, while others may take six months or longer. What's important is recognizing that the foundation for development begins during the training process, when competency is built as individuals learn and start doing their jobs productively. If initial training is weak or non-existent, later attempts at implementing a development process probably won't take root.

The Pay-Off

The most obvious benefit of developing employees is that it increases retention. Team members who feel like they're growing and excelling experience higher job satisfaction, especially if they see themselves achieving professional and personal goals as a result. They become even more anchored when they perceive their success as directly related to their managers' support. Talented employees stick around when they feel like they're getting something they might not get other places.

However, the most significant payoff is that organizations that make developing their team members a priority end up with individuals they want to retain. Engaging employees in an ongoing development process is the best way to ensure they increase in value year after year. When performance is continually improving, and individuals are motivated and committed, companies find themselves staffed with teams that can achieve the organization's goals and take it to the next level.

How Berke Can Help

One tool that is effective in laying the groundwork for a development strategy is the Berke Assessment. We know many managers think of it primarily as a tool for making hiring decisions, but we encourage them not to file it away once the selection process is complete.

So much of developing an employee depends on the individual's self-awareness. When people understand and accept their personality traits and talents, they gain insight into why specific tasks are well-suited to them while others are much more challenging. Once individuals recognize how they are "hard wired" it's easier to help them figure out how to maximize their strengths and manage their challenges. Berke's reports offer easy-to-read summaries of core personality traits and talents along with detailed explanations of how these things impact performance. For example, Berke reports can help you understand:

- Why an individual tends to react to situations in particular ways
- The dynamics of relationships with other team members, customers, and managers
- The person's communication style and work habits
- Why specific activities are easier vs. harder

Reviewing a Participant Report with a team member is a valuable first step in development planning. Not only can you provide employees with a snapshot of their core attributes, but you're also able to discuss how these traits impact their ability to do the job and interact with others. The report enables you to present talents and personality traits in a straightforward, objective manner and provides a common vocabulary for discussions.

A Thought on Changing People

While there's obvious appeal for managers in developing their people, it's important to remember there are limitations to improvement. Specifically, you have to understand the difference between changing and adjusting behavior.

A development process won't help an employee change who he or she is. For example, if an individual inherently prefers working all by himself, you won't be able to "develop" that employee into someone who would rather work on team projects.

You can, however, work with the individual on techniques to improve his relationships and interactions, coach him on social skills and communication techniques and, in general, help him learn to adjust to situations where he is required to interact with other employees. In this example, your goal is to use the development process to help him work with what he has rather than gain something he lacks.

The example above brings us back to why Berke Assessment profiles can be useful development tools. Helping employees understand who they are and then working together to bring out their best is the most successful way to help people reach their fullest potential.

Moving Forward

We've created this guide to provide managers with a step-by-step process for implementing an employee development strategy for their team members. We'll review techniques for getting started, conducting one-on-one development sessions, and preparing written plans for establishing action steps and tracking progress. We'll discuss tips for working with employees on goal setting as well as how to address situations where growth has stalled. Finally, we'll look at additional ways managers can use report information to get the most out of their teams.

The most successful managers recognize that few things are more damaging to an organization's health than stagnant employees who are disengaged, who are going through the motions but no longer feel driven to accomplish more than the minimum required to keep their jobs. Our goal in preparing this guide is to provide an antidote to that negative situation and instead give managers the tools to help their employees grow and thrive.

STEP 1 - INTRODUCING THE IDEA

One thing managers sometimes forget when embarking on an employee development strategy is that the right presentation is vital. If you don't ensure team members understand what you are doing, why you're doing it and, most importantly, how they will benefit from it, you may get a lukewarm response and half-hearted participation. On the other hand, if you take the time to explain the purpose, ask lots of questions, and encourage individuals to play an active role in the process, most employees are excited to begin charting their next career steps.

Before you start…

Before you roll out your plans to your current team, you need to be sure everyone is going to be a candidate for evolvement. If you have an employee who is struggling significantly with his or her current role, development will have to wait. Why? Because team members who aren't meeting or exceeding your expectations for job performance need to focus on improving first. This is a crucial distinction, and you will need to be prepared to explain it to any underperformers on your team. Until they can demonstrate satisfactory work in their current position, development is not a realistic step.

Development is an appropriate step to consider, however, for team members whose performance might be "okay" but not "great." The process for these individuals will likely focus more on improving weaknesses and overcoming current obstacles than charting next career steps. In the next section, we'll discuss how to conduct development planning slightly differently with these moderate performers to help them produce better results in the short term.

The Right Time

When should you embark on a development plan with a team member? For new hires, a solid window is around six months after initial training is complete. Look for signs that the team member is consistently demonstrating competency in the job and that he's becoming increasingly confident and comfortable executing regular tasks. His knowledge and skill base should be well-versed at this point, and he has hopefully built good relationships with his peers. Most importantly, if you've done a decent job managing his training process, he should feel that as his manager you are committed to his success and are willing to work with him on developing his full potential. For new hires who aren't making adequate progress, it's best to step in and institute development planning as soon as possible, so bad habits don't become entrenched.

For existing team members, development plans can be introduced any time: at the beginning of a new fiscal or calendar year, around the employee's anniversary date, or as part of an employee review process. Ideally, you'll begin developing your people before they get bored and stagnant, while they're still engaged in the job they were hired for but might welcome the opportunity to start thinking about and preparing for what's next. However, most managers may find they have a least one or two employees who are in a bit of a rut and may need more nudging to get them out. Realistically, you may also have some direct reports who continue to produce less-than-satisfactory results or who struggle with certain parts of their jobs. These people may be somewhat defensive and fearful of acknowledging the areas where they need improvement. In the next section, we'll look at some ways to handle any wariness or resistance you encounter from your more seasoned team members.

Setting the Stage

Before you sit down with your people to begin putting together development plans, there are a few preliminary steps you'll need to take. First, make sure your team members have taken the Berke Assessment since this information will be the cornerstone of your discussion of each individual's natural talents and abilities. For newer hires who completed the Berke as part of your hiring process, run a report in the system.

For individuals who came on board before you began using Berke, you'll need to explain why they need to complete one at this time. Be prepared to counter any concerns they may by explaining up front that you want to use this information to help them with career development and to help both of you determine how to maximize their strengths. If you've been communicating well with your top team members and providing them with regular performance feedback, they really shouldn't be concerned that you're asking them to do this. In situations where you will be addressing issues of underperformance, those individuals should already be aware that they aren't meeting your expectations.

Finally, most managers find it beneficial to speak briefly with employees before the first "official" meeting to outline the purpose of development planning and their goals for the initial meeting. For example:

"Susan, I'd like to schedule time during the next week or so for us to sit down and talk a little about where you see growth opportunities for yourself in your current job and within our company. I want us to review your Berke Profile to make sure we're on the same page as far as your strengths and how we can maximize them, and I want to hear about your goals and how you see your role here shaping up over the next few years. I want to make sure we're helping you move forward, and I'd like to give some thought to how I can support your development. Let's plan to spend about an hour just kicking some ideas around to get started."

By introducing the development process as a positive step in which the team member will have input and an opportunity to share ideas, you should be well-positioned for the best possible start.

STEP 2 - CONDUCT A DEVELOPMENT MEETING

When conducting your one-on-one development meetings with your people, it's important to remember that each session will be unique to the individual. While you should certainly be prepared with an agenda and some materials to guide the discussion, you'll also want to be flexible. Some employees will have definitive ideas about their goals and will be able to quickly and distinctly tell you their thoughts on opportunities they'd like to pursue. Others won't have a clue and may need more guidance and patience as you help them determine potential areas for growth. A different approach will be required for situations where the employee needs to focus on improvement before they can be developed. Regardless, you'll benefit from going into your development meetings ready to follow a variety of paths to get to the result.

Meeting Logistics

For your first meeting, plan on spending between an hour and 90 minutes with each team member. You'll need follow-up sessions to refine each individual's development plan, but this initial meeting will introduce the concept and get people thinking in the right direction. You may want to consider having this meeting off-site in a location free of distractions and interruptions. Getting out of the office often sends a message that you'll be focusing on a big picture topic as opposed to more day-to-day issues.

You'll also need to assemble some materials to guide your discussion. You may find it helpful to have the following items for each meeting:

- ❏ Team member's Participant Report
- ❏ Definitions of Berke Behavioral Traits and Talents
- ❏ Berke Scale Guide
- ❏ Goal Setting Worksheet
- ❏ Development Plan Worksheet

Before the meeting, managers should also review a copy of each employee's Job Fit report at the time of hire. Although you won't be sharing this report with team members as part of the development process, it's an excellent reminder of what parts of the position are inherently a good match with each individual vs. which ones have the potential to be more problematic. If the employee has been in the job six months or more, it's likely that their performance to date has validated the information in the report. Make notes on any examples of situations where you've observed issues occurring because of mismatches between a person's natural traits and their job's requirements.

Reviewing the Report

It's beneficial to begin each development meeting by reviewing the team member's Participant Report. Because so much of your discussion will be based upon a mutual understanding of the employee's core traits and talents, it's important that you both be on the same page as to what these qualities are.

One point you'll want to make up front is that personality traits and talents are not inherently "good" or "bad." Certainly, some traits make it easier for a person to handle some types of tasks or activities, but the same trait may also lead to challenges in other areas. For example, if a team member is high in Sociability, it will be easier for him or her to interact with a variety of people on group projects, but that same trait may also make it more difficult for the individual to work independently for long periods of time on solo tasks. The Berke Scale Guide provides a comprehensive outline for these discussions.

When you're ready to review the Participant Report, you can follow these steps for each personality trait and talent, beginning with the first one on the graph:

1. Review the definition of the term. This ensures the employee understands what is being measured. You can't effectively discuss someone's level of Structure or Spatial Visualization if he doesn't know what the words mean.
2. Point out where the employee falls on the Berke scale for that trait (high, medium, or low). Ask if she agrees or disagrees with the measurement, and follow-up with questions to explore her answer. For example, "Why do you see yourself that way?" or "How does that impact how you like to work?" Encourage the individual to identify examples of tasks or situations that illustrate the trait.
3. Using the Scale Guide, discuss the benefits and challenges of the measurement and relate them to any specific tasks that are part of the employee's current job. For example, "Your low level of Social Adaptability is one reason you're comfortable saying 'no' to a customer who's asking you to meet an impossible deadline" or "Your high level of Assertiveness helps you take the lead in situations where someone needs to step up and provide direction for others."

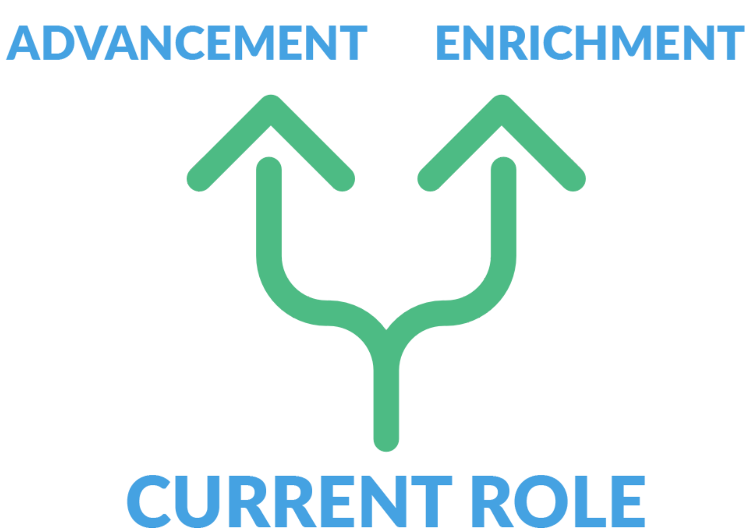
If the trait is an area of a mismatch with the target for the employee's position, this is the time to communicate problems you are seeing that the individual needs to address. For example, "Mary, something I'd like you to think about is that your very high level of Assertiveness is creating some issues right now in our team meetings. The last few times we've gotten the group together, I've noticed you're quick to want to take charge of making a decision when the team is brainstorming, and you've come across as someone who doesn't listen to other people's input. This is something I'd like to see you put effort into so we can avoid having it hold you back." If the employee is defensive or denies the problem, be prepared to provide more specific details to illustrate the issue.

The Scale Guide can be particularly helpful if you have a team member who is reluctant to accept a particular trait. He may not want to admit that he's low in Structure, but as you review the list of actions related to that measure, it will probably be difficult for him not to acknowledge that he sees himself doing those things regularly. Once again, be ready with examples of situations where you've observed the trait to reinforce the message.

Work your way through all the traits on the graphs using this framework, allowing the employee to share his or her thoughts and ideas. After all the items have been discussed, develop a list of tasks and activities the team member is naturally well-suited to performing and another list of the things she will find more difficult based upon her "hard-wiring." Emphasize that the goal of the development process is to leverage strengths and manage challenges by focusing on helping the employee grow using her natural abilities. The next step for "A" players will be goal setting, while "B" players will need to focus primarily on addressing challenges and improving performance in their current roles.

Advancement vs. Enrichment

An essential step before discussing specific development goals with high performing team members is to clarify a crucial point about career paths: they don't always involve advancement or moving up the organizational chart. When you talk about employee growth, many people assume that means preparing them for promotions that lead to increasingly higher level positions. While advancement is indeed one option, companies need to offer another path as well: enrichment.



What does the job enrichment path look like? It's one where people can learn new skills, increase their knowledge, improve their speed and accuracy, and handle new duties, all while staying at the level they are at within their position. They can prepare to be project leaders, spearhead change, mentor other employees, and cross-train to assist with covering other jobs. The enrichment path is an excellent choice for individuals who either aren't suited to management roles or don't have an interest in moving into that type of position. Providing development opportunities for these team members ensures they stay engaged and motivated while avoiding getting bored or feeling their efforts aren't recognized because they aren't rewarded with a promotion.

Rather than telling team members which path you think is best for them, show them the graphic depicting the two options, talk about how the company needs employees on both sides, and ask them which one they think is a better fit for them right now. Remind them that they can always decide to switch paths later if their situation changes and they want something different. Ask questions to figure out why the particular option they chose is appealing to them so you can gain insight into what's motivating them right now.

Setting Goals

The final step in the development meeting is to establish some long-term and short-term goals for areas of growth and/or areas of improvement. These will be consistent with each employee's strengths and challenges as well as his or her career path focus. You'll want to reference the list you and the team member prepared in the previous step using information in the Participant Report to detail tasks the individual excels at doing vs. ones that are more difficult.

For those employees who need to focus on improvement, goal setting will primarily involve establishing objectives for performing current tasks with higher efficiency. For those who are already excelling, it will center on determining where the team member would like to be in 3-5 years and then focusing on some interim objectives for the upcoming year. The Goal Setting Worksheets (included in this guide) can be used to break larger goals down into smaller, shorter-term objectives.

Once goals are established, use the Employee Development Plan Worksheet (provided in this guide) to brainstorm action steps. For example, if an employee's long-term goal is to prepare for a management role (advancement path) and one of her interim objectives is to understand how to put together a department budget, you might list that in the "Skill" category and identify yourself as the source to train her. Another team member might want to gain some knowledge of how another department functions so he can improve some of the systems that flow between the two groups (enrichment path). You could list that under "Knowledge" and identify the source as a manager or senior team member in that department. Finally, an individual who needs to set a performance improvement goal to address his issues with sloppy or incomplete paperwork and reports might commit to putting together a schedule that allocates blocks of time each week to these activities and creating a checklist to help him proofread documents for accuracy.

For some team members, this final step may take some time and require additional follow-up meetings. While some individuals will already have a definitive idea of where they are heading career-wise and will be able to start mapping out their development plan, others will struggle and may need more support. Whether they haven't given much thought to anything but their current jobs or if they aren't sure their future goals are realistic or even achievable, you may need to give them some time to think about where they see themselves and what they'd like to do.

Throughout the development plan preparation process, your job as a manager is to coach, guide, and offer your support whenever possible as your employees envision how they can grow with the company. At times you may need to push them a little and help them see their potential. In other instances, you may have to rein them in if their goals aren't consistent with their strengths or if their time targets are too ambitious. For underperformers, you'll need to hold them accountable for improving and remind them that you want to see them be successful. In all of these scenarios, facilitating this process is a great way to show your employees you're invested in their futures and committed to helping them move forward.

Goal Setting Worksheet

Timeframe	Personal Goals	Business Goals
Someday Goals		
1 Year Goals		
Next Quarter Goals		
This Month's Goals		
This Week's Goals		

Development Plan Worksheet

Team Member: ___________________________ Date: ____________________

Core Strengths	Key Challenges

Development Opportunities

Skills	Source

Knowledge	Source

Experience	Source

Mentoring	Source

STEP 3 - FOLLOW-UP

If there's one place in the development process that has the potential to be problematic, it's this final phase: ongoing follow-up. In too many cases managers and team members enthusiastically prepare goals and action plans and then promptly file them away and forget about them. It's easy to get distracted and bogged down in daily crises, project deadlines, heavy workloads, and myriad other issues while the good intentions outlined in development planning are forgotten. No matter how much both parties want to see favorable results, too often even the best development processes don't bring about visible growth.

Regular Check-In

To avoid having this happen and derail your previous efforts, we recommend you establish regular, non-negotiable follow-up meetings to track the progress of each team member. It's easiest if these happen systematically: the first or last week of each quarter, for example. Let your employees know that they need to come prepared to update you on their progress and discuss any issues or challenges they are having on the development front.

Even if they haven't made much headway over the past 90 days because they've been sidetracked with other duties, the meetings still need to happen because you might be able to help them identify some small steps they could take or identify roadblocks that could be removed to free up more time for progress. Either way, knowing they are accountable once a quarter for providing an update is a sure way to keep them focused and moving forward.

When Things Aren't Going as Planned

One final thought on follow-up: It's crucial to help employees identify when a development plan isn't working and take steps to modify it if necessary. In some instances, team members start out thinking they'd like to head in a particular direction and that they'd enjoy doing specific activities only to find out they don't. It helps to stay flexible and encourage employees to change course when the original plan needs modifying.

For employees whose development process is more improvement-based, managers may need to provide more direct input if goals aren't being achieved. For example, if a team member continues to struggle with a part of his or her job that is critical to success, the individual's manager must be prepared to establish consequences if the established Action Steps are not being implemented. For example, a team member may not receive a raise or bonus if adequate progress is lacking in an identified area.

Celebrating Success

Always make sure you're on the lookout for opportunities to celebrate both the large and small successes that occur as result of employee development. Let your team members tell their peers about action steps they've completed during staff meetings. Provide positive feedback when you see them putting the time and effort into working on their goals. Ask other managers (especially your own) to acknowledge their progress and encourage their efforts. This is especially true for those employees on the enrichment path, as their accomplishments often go unnoticed since they don't result in a tangible reward like a promotion or a change in title.

STEP 4 - OTHER USES FOR PROFILE INFORMATION

Once you lay the groundwork for developing your employees as individuals, you may want to help them grow as a team as well. The Berke reports offer excellent ideas for better managing your team and increasing its capabilities.

Team Building

An essential element of teamwork is a willingness to understand your coworkers, appreciate how they might differ from you, and find ways to work together despite differences. Once your employees understand their core personality traits and talents and how those qualities impact their performance, it's helpful to have them begin sharing this information with their peers as a means of determining how to communicate and interact better.

To help with this process, managers can access a Score Detail Report in the Berke system (email Berke Support at support@berkeassessment.com if you are a manager and need help finding this). This report provides a list of all of your direct reports and their related personality and talent traits on a spreadsheet that allows you, at a glance, to identify similarities and differences between team members.

For example, let's say you have two team members who have a hard time working together on a project, even though they are both committed to producing good work. In reviewing the Score Detail Report, you notice that one of them is very high in Responsiveness and the other is very low. This could explain why one prefers to work at a more measured pace and is patient in addressing problems when they arise, while the other likes to react quickly and jump on issues as soon as they have been identified.

Using this information, you can sit down with these individuals and talk about their natural tendencies and how they differ. While neither is right or wrong, their work styles are going to be dissimilar and may cause conflicts. Once you can get both parties to understand their issues are based on different traits, they can focus on finding a middle ground and developing strategies to avoid frustration with each other.

Project and Task Distribution

Another excellent use of the Score Detail Report data is determining how to better assign tasks or projects based on the unique personality traits and talents of the individuals on your team. Rather than assuming you should be able to pass on duties to whichever individual has the most time available, it makes sense to utilize the employee who is most naturally suited to doing it.

This means that if you need someone to handle a problem with an upset customer, a team member who's lower in Social Adaptability might have thicker skin and not take an unpleasant encounter personally. If you need to pull together a couple of people to brainstorm ideas for a new process, you can select two that have high levels of Idea Productivity. If you've got a project that's going to require a week of solo work entering data and crunching numbers, a team member who's low in Sociability is going to be able to handle spending long hours at the computer better than one who needs a lot of peer interaction. The Score Detail Report can help you identify which team members are better suited to specific tasks.

Managing Change

One more area where Berke Score Detail information can be an asset is helping your team navigate change. Whether it's sweeping organizational changes or relatively minor shifts in the way your department operates, some people are more comfortable accepting a new direction than others. The trait Berke measures that most impacts an individual's compatibility with change is Structure, and knowing how much of this quality your team members have will inform how you manage them during periods of transition.

Employees who are high in Structure will need more hand-holding when changes are being made. Many are very uncomfortable without predictable patterns and known outcomes, so you'll need to spend more time walking them through the steps that will occur, explaining the reasons behind each move, and preparing them for what's next. The unknown is scary to people who are high in Structure, and the more you can do to help them understand and prepare for what's ahead, the less likely they are to resist and cling to the old way.

Conversely, people who are low in Structure tend to be comfortable with plunging into the new without being 100% sure what the outcome will be. They are more willing to take risks and don't usually have to be coaxed into trying something different.

Since most managers have a mixture of high, medium, and low Structure employees, reviewing the Score Detail Report and planning in advance how to manage each individual's needs can go a long way toward helping changes unfold more smoothly.

FINAL THOUGHTS

The longer a manager is responsible for the performance of a particular team, the more crucial it is that he or she focuses on ensuring that the group is cohesive and that the individual components are increasing in value year after year. It's not enough that a team handles the workload and gets things done on time. Managers need to be able to demonstrate they are developing their people to provide the talent and resources the company will need to take full advantage of future opportunities.

Ironically, one of the most common reasons employees give for leaving one job for another is that they couldn't see a future continuing down the path they were on. These are sometimes talented people with great potential, and their managers usually know these individuals are capable of doing and being more. No one bothers to ask them about their goals, much less take the time to help them figure out how to achieve them.

One manager who was in this situation recently told me, "One of our best employees left because one of our competitors offered her management and leadership training, but she never told me she wanted support in that area. We would have given her some professional development opportunities if she'd just told us that was important to her. Why didn't she speak up?" A better question might be, "Why didn't her manager ask her?"

Our hope in preparing this guide is that it will provide you with a framework for putting your team members on a path of continuous improvement. Watching your people grow stronger year after year and having them realize you are working to pave the way for their success is one of the best retention strategies a manager can have.