Supervisor 101

Performance Management Basics

Overview

- Types of Performance Communication and Feedback
- Demo- Paylocity Journals for performance documentation
- Coming soon!
- HR Housekeeping

Types of Performance Management

- Recognition- Identifying and celebrating a strength
  - Communicating what good looks like
- Constructive Feedback- Identifying an opportunity
  - The Redirect- Remember, everyone's behavior is reasonable from their point of view, at least in that moment. It is your job to identify when it is not reasonable and quickly redirect it
- Progressive Performance Counseling
  - Identifying a serious issue- Safety or integrity issues
  - Identifying patterns or repetitive issues
    - These should not be a surprise, we should be having and documenting leading conversations.
    - Accountability is expected to come out of these conversations
      - Action items

Performance Counseling BEST Model

Framework for conversations- BEST

Behavior- Specific observed behavior and the impact of that behavior.

    Identifying the Behavior and Clarifying the cost

Expectation-Reference a policy, procedure or specific expectation

    Job description, Handbook Policies, SOP

Solicit Input- Ask them why

      Were you aware….? What was your thought process?

Talk next steps- Detail an action plan to correct the behavior with Check-ins,

      Re-set expectations

Journals in Paylocity- In performance tab

- Notes- general notes and quick conversations
  - First time offenders
  - Used to remind yourself of conversations you are having or things you are seeing
- Above and Beyond- for employee recognition
- One-on-One-sit down conversations
  - They can be used to show progressive action that will lead to PC
    - Repetitive reminders or to help identify patterns
- Development plan- For constructive performance counseling
  - Already Laid out in BEST format
  - Serious issues that require a formal conversation with a plan to improve

Documentation and follow-up
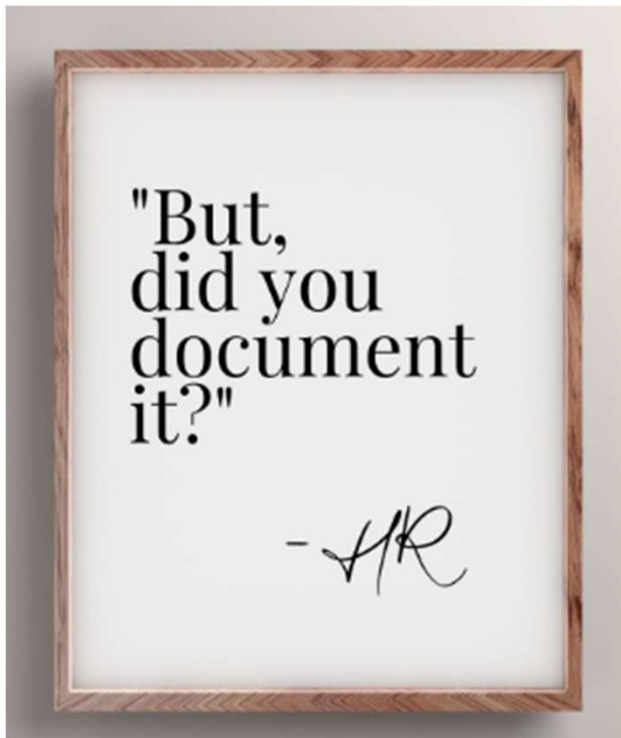
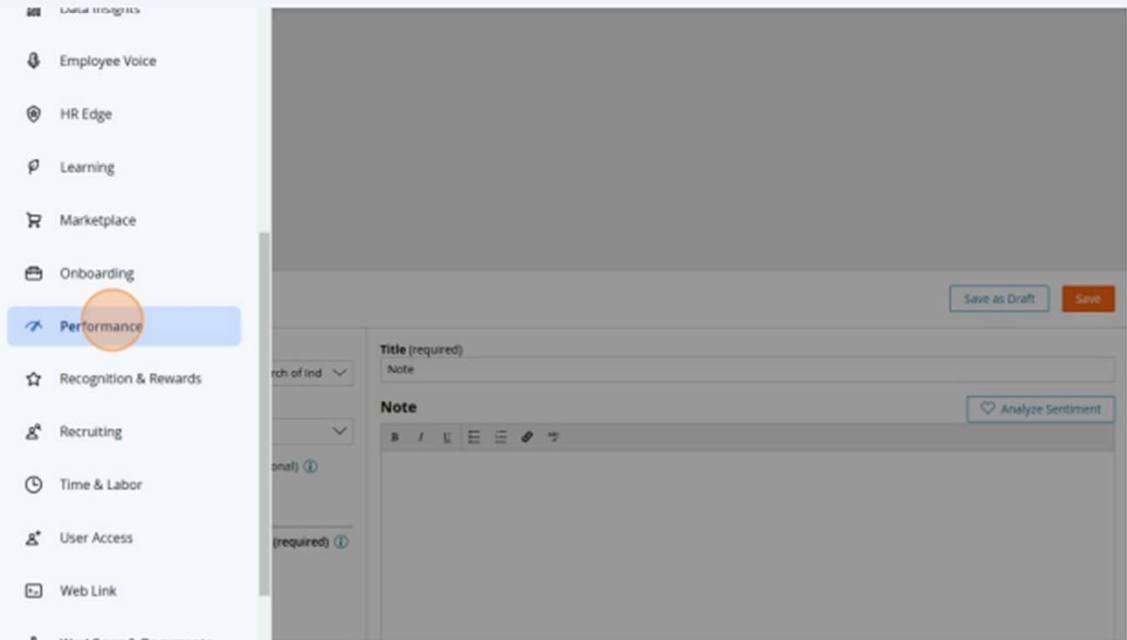**Regular use of journals will create a better overall communication culture for everyone**

- Development Plans-Performance Counseling documentation should be created before you have the conversation
  - This is the framework or outline of your conversation to keep you on track
  - Clear, concise, and without emotion, bring it back to the individual and their behavior
- Recognition documentation can be done on the fly, or after the fact, The App is your friend!
  - Don't forget! Recognition is SO important
- If you schedule a check-in, make sure you follow through.
  - Make sure to also communicate that it will happen so they are not left feeling anxious
- I am here to support you! I am happy to review documentation or communication, sit in on awkward conversations, or schedule individualized training with any of you!

Paylocity Demo

2 Click "Create Journal"

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3 Use the Note template for general notes. This can be things you see and don't want to forget. Things a direct report may have said to you or a conversation you had that seemed important. This can be private, or shared.

< New Journal   Save as Draft   Save

Journal Company   **Title** (required)
(192416) First Baptist Church of Ind ⌄   Note

Journal Template   **Note**   ♡ Analyze Sentiment
Note   ⌄   B I U ☰ ☰ ⌗ 🔗 ᵃᵇ

Make Journal Private (optional) ⓘ
⬤

Who is this journal about? (required) ⓘ
○ Me ⦿ Someone else

[Add About Person(s)]

Share this journal with About Person(s)
⬤
                                              Keyword Tags
Contributor(s)   Keywords   ⌄
Journals are automatically shared with the
direct supervisor of the About person(s).   **Attachments**
They can be viewed by HR administrators
and managers within the person(s) direct

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4 For recognition, select "Above & Beyond." This will beak down into 3 sections to add notes: serving others, leading by example, or encouraging others. Share that with the person(s) it is about.

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5 The "Development Plan" Template should be used for Performance counseling. This is meant for in person performance counseling conversations. The "Coaching Focus" drop down will have options for Behavior, Expectations, Skill development, or other.

Journal Template

Development Plan ⌄

Make Journal Private (optional) ⓘ

◯

Who is this journal about? (required) ⓘ

◯ Me ⦿ Someone else

[Add About Person(s)]

Share this journal with About Person(s)

◯

The **Development Plan** is a structured tool designed to clarify expectations, provide targeted support, and track progress in key performance areas.

Coaching Focus
Identify the key area for coaching and development.

Behavior ⌄

Key Areas for Improvement   ♡ Analyze Sentiment
Outline the specific behaviors, skills, or performance gaps that need improvement.

B I U̲ ☰ ☰ 𝒫 ✎

Define Expectations   ♡ Analyze Sentiment
Define the specific expectations and standards the employee is expected to meet.

B I U̲ ☰ ☰ 𝒫 ✎

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6 **B**ehavior- The area for improvement is the specific behavior, skill, or expectation you would like to discuss, and their impact on the organization

Journal Template
Development Plan ⌄

Make Journal Private (optional) ⓘ
⬤

Who is this journal about? (required) ⓘ
◯ Me ⬤ Someone else

[Add About Person(s)]

Share this journal with About Person(s)
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7 **E**xpectation- Define the specific expectation or policy and where to find it. For example, when referencing an issue with a teachers behavior, you could copy and paste the expectation written in their teacher agreement or handbook with page or section numbers

8 **S**olicit input- Ask why or what lead them to their choice. You can add notes in this section to clarify what they have to add to this conversation, but always be sure to direct them back to the issue you are discussing and don't allow them to derail the meeting. This is not an invitation for them to identify what they think are other areas of concern.

Employee Input   ♡ Analyze Sentiment

B I U ≣ ≣ ⊘ ⇥

Next Steps   ♡ Analyze Sentiment

Create an action plan for the employee to meet expectations and improve performance.
Detail what tools, coaching, or resources will be provided to assist in improvement.

B I U ≣ ≣ ⊘ ⇥

Coming soon-Bringing it all together

- Goals in paylocity
  - Updated and trackable feedback that will tie into review process
- New feedback and review process
  - Journals will be able to tie in to this
- New updated employee handbook that will tie into paylocity