



End-of-Year Guide for Your Managers: Promotions, Performance Reviews, and Planning

Presented By: Brianna O'Hara
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Presenting Today



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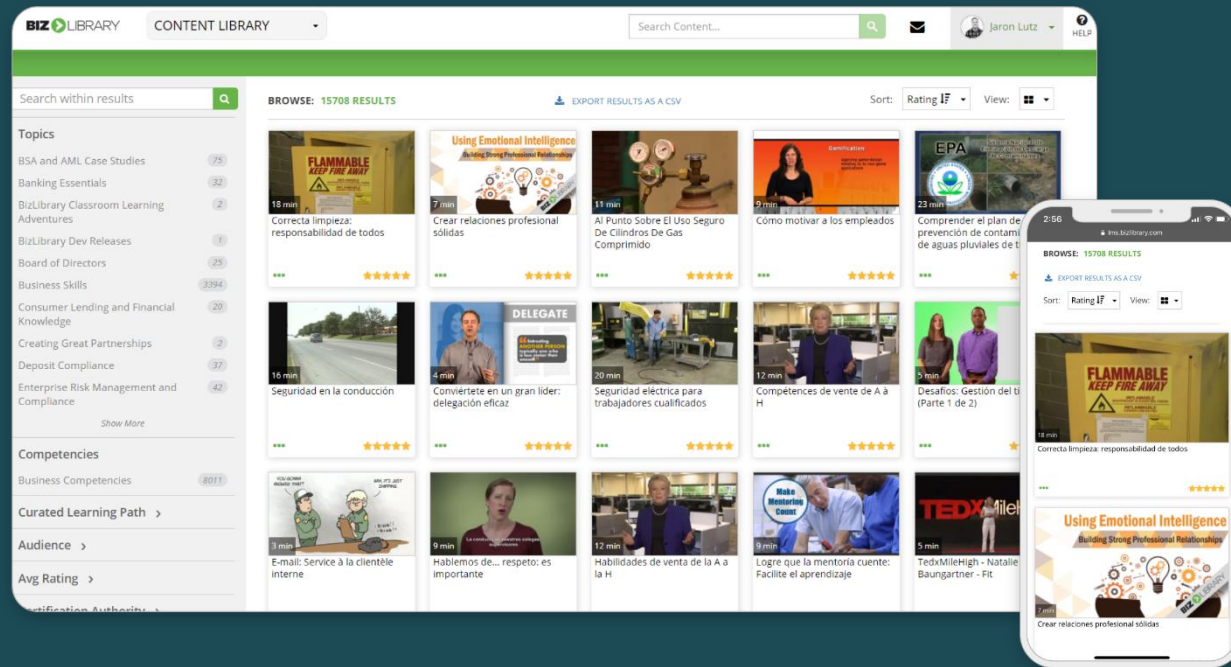


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Chat Question

**What's the first word you think of
when someone says, “the end of
the year”?**

The three Ps for the end of the year:

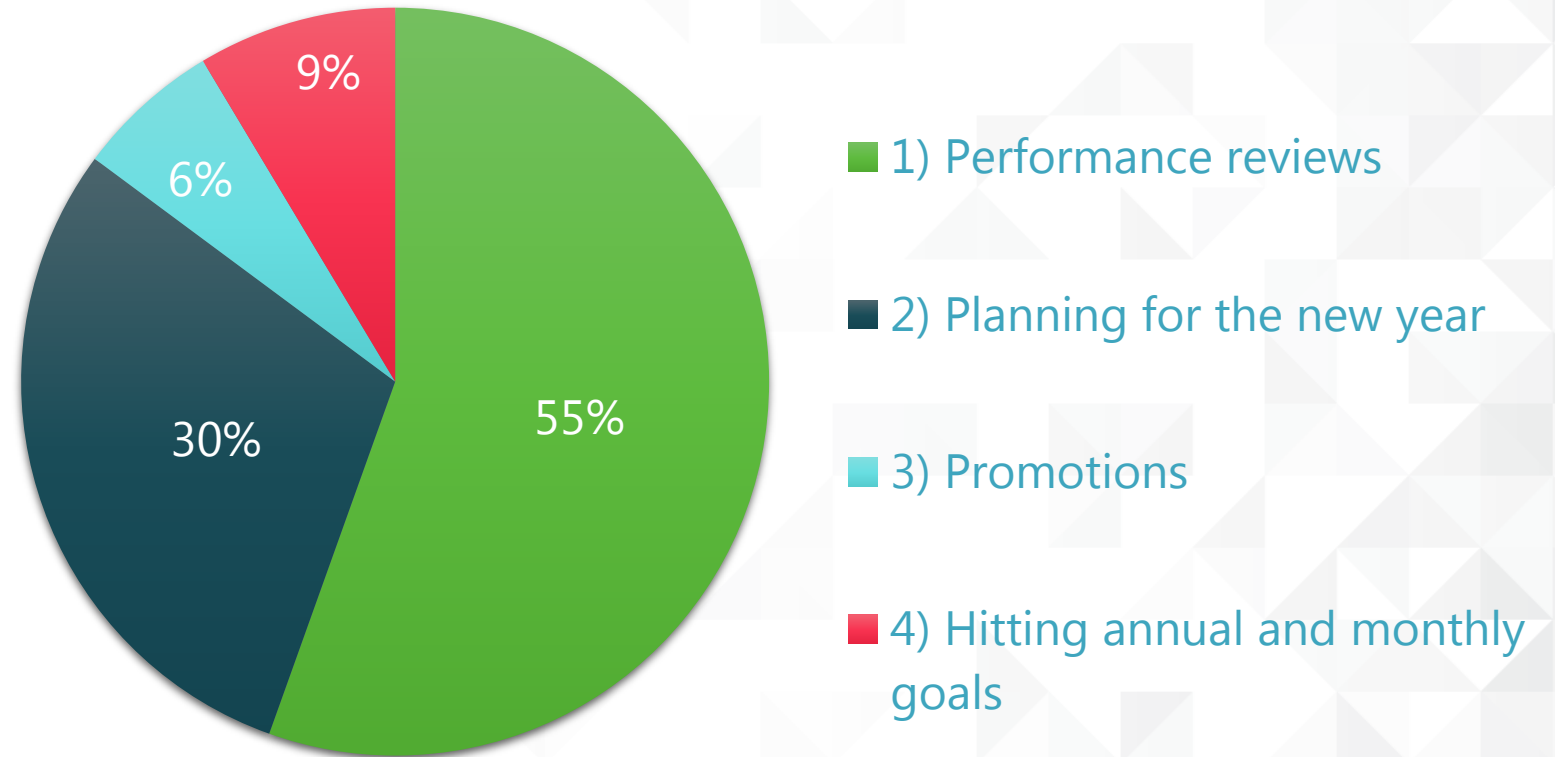
Performance Reviews

Promotions

Planning

Registration Survey Results

Top struggles for managers at end-of-year



What we're going to learn today

- The top key areas for training managers and leaders
- How to have performance reviews that are a positive experience now and for future results
- A framework to help individuals self-evaluate their readiness for promotion
- Tips to help managers meet goals while setting a strong vision for the future

Managers have a disproportionate impact on organizational outcomes -- they influence at least 70% of your employees' engagement.

- Gallup, [Why Manager Development Is a Top Goal for Leaders This Year](#)

HARD TRUTH:

Organizations often neglect true development of their managers.

66% of managers report that their employer offers a professional development program

One-third of managers strongly agree they have had opportunities to learn and grow in the past year

5 Principles of Great Management



- **Planning**
- **Organizing**
- **Staffing**
- **Leading**
- **Controlling**

Source: <https://www.ashford.edu/online-degrees/business/5-principles-of-great-management>

5 Skills Found in Leaders

- **Communication**
- **Awareness**
- **Honesty/integrity**
- **Relationship building**
- **Innovation**





The diagram consists of two overlapping circles. The left circle is light green and contains the text 'Management:' followed by four bullet points: 'Employee Handbook', 'Difficult Conversations', 'Hiring / Termination', and 'How to Have Successful Meetings'. The right circle is dark teal and contains the text 'Leadership:' followed by four bullet points: 'Vision Casting', 'Motivating', 'Empowerment', and 'Emotional Intelligence'. The overlapping area in the center is a darker shade of green.

Management:

Employee Handbook

Difficult Conversations

Hiring / Termination

How to Have Successful Meetings

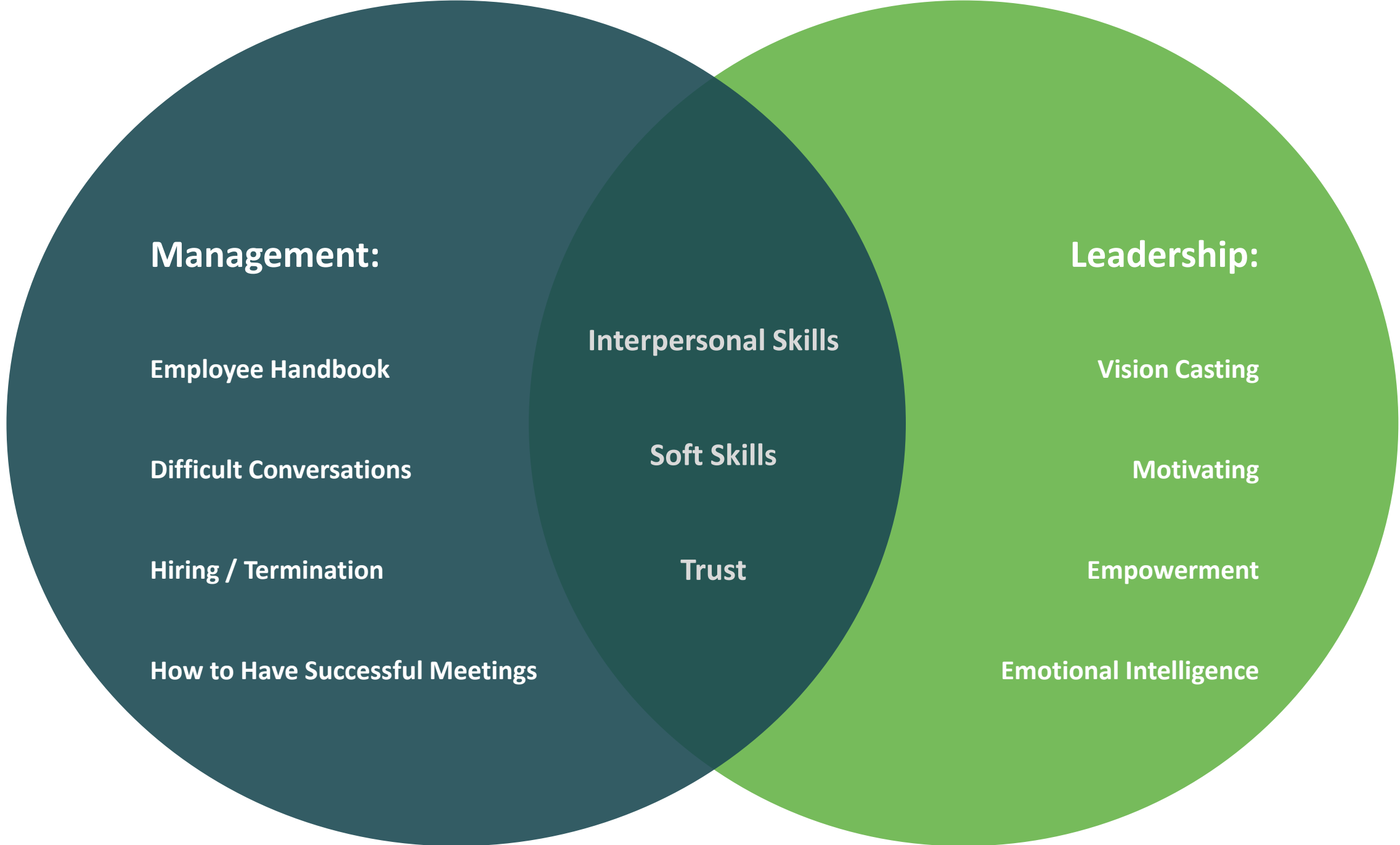
Leadership:

Vision Casting

Motivating

Empowerment

Emotional Intelligence



Interpersonal Skills

Managers manage and
leaders lead...people

Soft Skills

Soft skills are about
how YOU work

Trust

The foundation for everything

*“Trust is the one thing that affects everything
else you’re doing...from strategy to execution.”*

— The Speed of Trust, Stephen Covey

POLL

How often do your managers hold performance conversations with their teams?

- A. Annually
- B. Bi-Annually
- C. Quarterly
- D. Consistent feedback is given at least monthly

Performance Reviews vs. Performance Conversations



- Dreaded
- Scary
- Formal
- Feedback saved up for end-of-year
- Anxiety-inducing



- Occur regularly
- Helpful
- Constructive
- Dedicated time with manager/employee
- Feedback delivered throughout the year

Benefits of Continuous Feedback



Improves engagement, especially with the younger generations of employees



Helps with retention



Builds stronger relationships between managers and employees



Fixes shortcomings quicker

Building a culture of consistent feedback means MUCH easier performance reviews at the end of the year.

Performance Conversation Tips

1

**Praise with “you”
and correct with
“I” statements**

2

**Handle positive
and negative
feedback
separately**

3

**Praise to criticism
ratio should be 3
to 1**

4

**Provide timely
and specific
examples**

5

**Agree on action
steps at the end**

Performance Review Framework

	Desired Work and Actions	Actual Performance	Future Actions
Major Responsibilities			
Goals			
Actions, Behaviors or Competencies			

Self-evaluate their readiness for promotion.

Three Key Questions:

1. How confident am I performing my current role?
2. What are some of the key skills that I would need to hold this position?
3. Do I feel I'm ready for this extra responsibility? Why?

Performance Assessment

With a continuous coaching model, this should be easy for your managers and employees to already know.

Are you doing the job?

Are you improving the job?

Are you living the values?

Are you improving yourself?

STEP 1: PLAN

Soft Skills Assessment

TWO GROUPS YOU CAN CONDUCT THE ANALYSIS ON:

Individual

Team/company

Scope	Who is in charge of the process	When to conduct a soft skills gap analysis	How to respond to soft skill gaps
Individual level	Manager	<ul style="list-style-type: none">- Changes in employee's duties- Poor performance review- Need for new skills for a promotion or new project	<ul style="list-style-type: none">✓ Training✓ Succession planning✓ Mentoring initiatives
Team/company level	Manager HR/L&D Directors/C-suite	<ul style="list-style-type: none">- Problems meeting business goals- Strategy shifts- New technologies- When a team is exceeding their goals	<ul style="list-style-type: none">✓ Hiring✓ Training programs✓ Mentoring initiatives

STEP 2: IDENTIFY IMPORTANT SKILLS

TWO QUESTIONS:

What skills do you value as a company?

What soft skills do our employees need to do their jobs well now and in the future?

	Importance	Skill level required
Leadership	High	Excellent
Presenting	Moderate	Good
Initiative	Low	Average

STEP 3: MEASURE CURRENT SKILLS

THREE WAYS TO MEASURE:

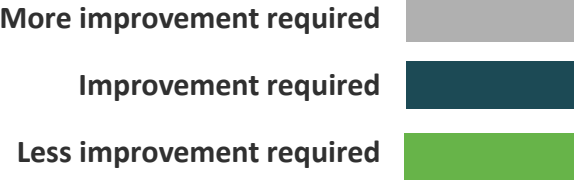
Surveys and assessments

Interviews with employees

Feedback

	Importance	Required level	Actual level
Creativity	High	5	4
Collaboration	High	3	3
Persuasion	Moderate	4	2

STEP 3: MEASURE CURRENT SKILLS



<u>Skill Type</u>	<u>Skills</u>	<u>Site Leadership</u>	<u>Middle Management</u>	<u>Frontline Supervisor</u>
<u>Functional</u>	<u>Health, Safety, & Environment</u>	Less improvement required	Improvement required	More improvement required
	<u>Six Sigma Competencies</u>	Less improvement required	Less improvement required	Less improvement required
	<u>Computer-Aided Design</u>	Less improvement required	Less improvement required	More improvement required
	<u>Functional Specification</u>	Improvement required	Improvement required	Improvement required
<u>Business</u>	<u>Decision Making</u>	Improvement required	Less improvement required	Less improvement required
	<u>Customer Orientation</u>	Improvement required	More improvement required	More improvement required
	<u>Adaptability</u>	More improvement required	Improvement required	Less improvement required
	<u>Time Management</u>	More improvement required	More improvement required	Less improvement required
<u>Leadership</u>	<u>People Management</u>	More improvement required	More improvement required	Improvement required
	<u>Effective Communication</u>	Less improvement required	More improvement required	More improvement required
	<u>Creativity & Innovation</u>	More improvement required	Improvement required	Less improvement required
	<u>Digital Vision</u>	More improvement required	Less improvement required	Less improvement required

STEP 4: ANALYZE THE DATA

COMPARE

The analyzed CURRENT state

The established IDEAL state

STEP 5: **CREATE A PLAN**

Where do we go from here?

Stay Interview Question Examples

WHAT I SEE

WHAT I DO

PERSONAL COMPETENCE

Self-Awareness

Self- Management

SOCIAL COMPETENCE

Social Awareness

Relationship Management

Understanding the 4 Facets of EQ

How can we help our managers manage their stress, hit their goals, and create a strong vision for next year?

Here are some tips that we've used:

- Managing up
- Stay interviews
- Recognition
- Focusing on the manager's needs, too
- Make plans

Stay Interview Question Examples



1. What was your biggest success this year?
2. What was your biggest failure?
3. What did you learn from each of the above?
4. How do you prefer to be recognized?
5. Help me understand your career progression/aspirations.
6. If you managed yourself, what might you do differently?
7. How can we, as a whole (company), improve for the future?
8. Are there any triggers that would make you look for employment elsewhere?
9. What makes you enjoy your work most?
10. What motivates you, intrinsically and extrinsically?
11. What are just 3 things your want to overcome/develop/achieve in the next year?
12. Do you feel challenged enough in your work?

GOST PLANNING FRAMEWORK

GOALS

What do you want to accomplish? Big picture

Objectives



What can be measured?
Are there KPIs that
you're looking to
change?

Ex: Decrease employee
turnover by 10%



Strategies



What methods are you
going to use to get to
your objectives?
Different approach?

Ex: Implement new
manager training
program on a company-
wide basis.



Tactics



What will you be doing
to support your
method?

Ex: Hold monthly
training sessions to
discuss top current
challenges of managers.

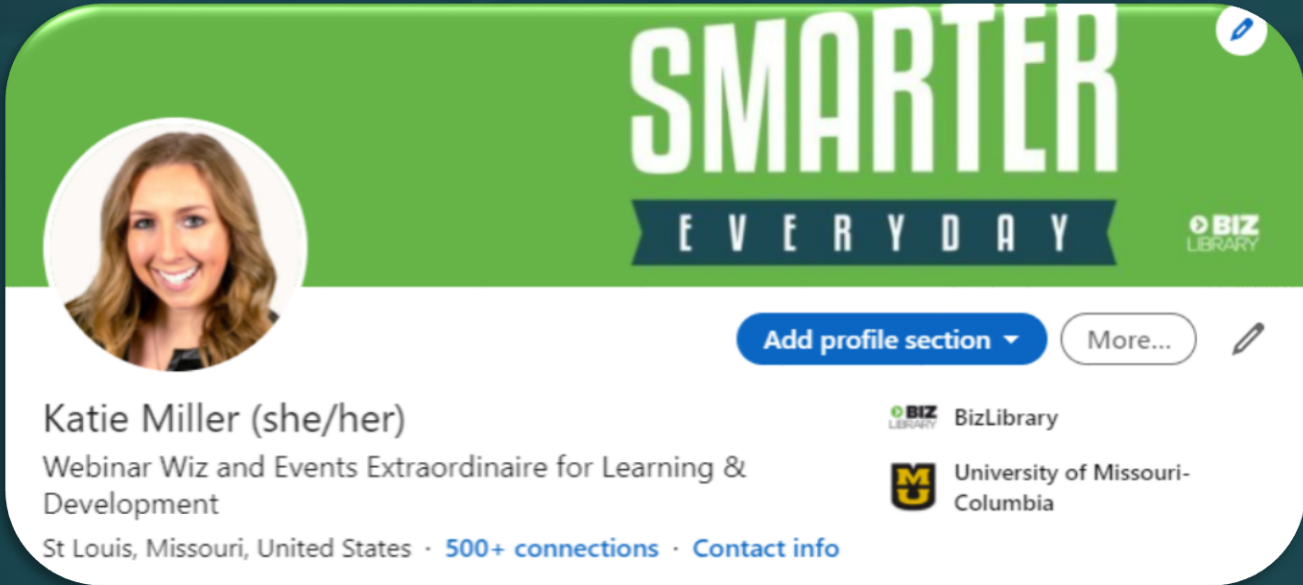


PEOPLE

Key Takeaways

- **The importance of developing your managers and leaders.**
- **The three skill areas that every manager and leader should development, interpersonal, soft, and trust**
- **Continuous feedback has a plethora of benefits for managers, employees, and the organization**
- **A framework for better performance conversations and assessments for self-evaluation**
- **Tips like managing up, recognition, stay interviews and the GOST framework to help managers meet goals while setting a strong vision for the future**



Connect with Brianna and Katie on LinkedIn!

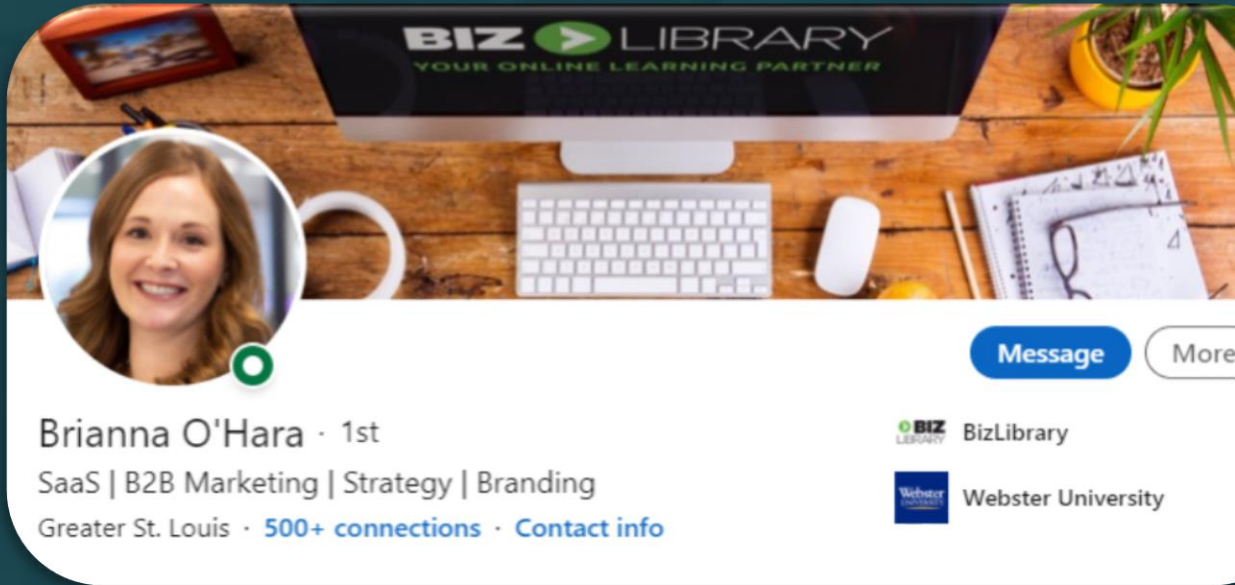


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Katie Miller (she/her)
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St Louis, Missouri, United States · 500+ connections · [Contact info](#)

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 BizLibrary
 University of Missouri-Columbia



LinkedIn profile of Brianna O'Hara. The profile picture shows a woman with long brown hair. The background banner features the BizLibrary logo and the text "BIZ LIBRARY YOUR ONLINE LEARNING PARTNER" over a desk scene with a computer, keyboard, mouse, and notebook. The profile name is "Brianna O'Hara · 1st", followed by "SaaS | B2B Marketing | Strategy | Branding". Her location is "Greater St. Louis", and she has "500+ connections". There are buttons for "Message" and "More...". Two company logos are listed: BizLibrary and Webster University.

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New managers will learn how to:

- Cultivate the right mindset for succeeding as a manager
- Create strategies to expand their emotional intelligence
 - Overcome common challenges that new managers face
 - Supervise their former peers
- Develop strong goals for the department
 - Generate results

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Thank you for attending!



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