

**MEASURE**

**PERFORMANCE**



# How to Measure Performance Management

The truth is: employees can make or break a practice.

BY LYNN HOMISAK, PRT

## Okay, So What Does It Take?

Employers and managers acknowledge that running a successful business starts with hiring the right team players. After that, it involves ongoing guidance of the team to shape them to their full potential, a management mindset, good leadership skills, a head for problem solving, and a willingness to make necessary changes.

More to the point, they realize that employees play a major role in the success or failure of their business; and for this reason, acknowledge that a conscious awareness and understanding of their workforce and culture is needed.

Employee performance management, including those perceived as tedious one-on-one reviews, is a basic strategy that can unlock the door in establishing such an understanding. It is a learn-as-you-go process that gets easier, is increasingly educational, and even becomes more comfortable with each undertaking.

Things a skeptic might say:

“Why bother?”

“My staff should already know what I expect of them.”

“Nothing ever gets accomplished!”

“It’s both time-consuming and confrontational.”

“It backs me into having to give staff a raise (that they may not even deserve).”

Avoidance, reluctance, and even selected feelings of opposition to either unpreparedness, fear of the unknown, or to prior experiences comes from failure

staff performance can and will have a resounding positive impact on practice efficiency, growth, and profitability.

Make no mistake. Staff are an integral component of practice excellence and daily streamlined workflow. You’ve

**“Performance management involves embracing employees’ strengths and being open to innovative ideas—even ones that change the status quo.”**

**—Steve Jobs, co-founder, Apple Inc.**

to reach a successful outcome. If you are among the skeptics who insist that employee performance management is not all it’s cracked up to be, you’re likely missing out on one of the most fundamental management “engines” in business. Good management drives good employees.

If only the disbelievers could take a step back and look at this administrative practice as a way to tap into and help elevate staff competencies, they would see that the sky’s the limit in terms of what these individuals are capable of achieving. By simply facilitating an open communication environment,

heard if before—they can make or break a practice. It’s not just hearsay. The fact is, they can, and they have.

## Intro to Reality

If performance management is new to you and you don’t quite know where to begin, do not be intimidated. You are not alone. There are employers in all walks of life, not just in healthcare, who decide that sitting on the fence is just more comfortable, easier, than taking action they feel will only spur bad feelings and inter-office

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strained relations. Some may even cry, “It’s all effort and no gain.”

Unfortunately, by taking that intimidated stance, they know not of the associated short and long-term gains. That is, provided they concede that staff retention, increased efficiency and productivity, quality customer service, and a more attentive and committed labor force are, in fact, valuable gains.

Perhaps if they realized that participating in such a program has the added potential to increase revenue by creating a more pleasurable workplace, that could be the return-on-investment needed to win them over.

If those who protest do decide to give it another go, they might even discover that joining the ranks as a reformed “gains-recipient” is a road worth traveling. After all, it’s never too late to set foot on a new path. Implementing overall better management practices (like it or not, conducting performance reviews falls in this category) and learning more about your team’s mindset and abilities are no-brainers.

It doesn’t take a degree in rocket science to get through a performance evaluation with flying colors. Like anything else that is well-planned out, a worthwhile program has a beginning, middle, and end, all of which are detailed in the text that follows.

By way of clarification, the evaluation/review/appraisal are only part of a more comprehensive performance management structure. These two processes go hand-in-hand and, doing the former without monitoring and managing progress, is doomed to failure. For optimal results, it is in every practice’s best interest to do both.

Study after study shows that employees want good management. We were all employees once. Don’t we agree? One rule of good management is to provide employees with feedback on their performance and realize why that is important. Look at what the facts tell us.

### Facts Matter!

- 65% of employees desire more feedback.
- Companies that invest in regular employee feedback have 14.9% lower turnover rates than organizations where employees do not receive feedback.

- Four out of ten employees who receive little to no feedback are actively disengaged from their work.
- 69% of employees say they would work harder if they felt their efforts were being recognized through feedback.
- 43% of highly engaged employees receive feedback at least once a week.

- C. Do you have practice goals and are staff aware of them?
- D. Will you commit to making necessary changes based on information you’ve learned during your employee engagement?
- E. Do you have a follow-up plan in place to monitor and/or provide

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**“What gets measured gets done, what gets measured and fed back gets done well, what gets rewarded gets repeated.”—John E. Jones, CEO, CBI Industries**

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### Step 1: Know the Purpose

*“At heart, this is the purpose of performance management—to improve each other’s day-to-day experience at work.”*

—Drew Dudley, Author

A. A performance management program allows the opportunity to evaluate employee work characteristics, efforts, and qualifications.

- It serves to outline employee strengths, weaknesses, where they fit best, and where they are most productive within the practice.

- It exists to help employees improve and gain confidence in their work by learning from their mistakes in an effort to avoid repeating them. No one wants to waste time doing things wrong.

B. Employees appreciate (and deserve to know) where they stand, how they are doing, and where they need to further develop their skills. Legitimate feedback helps them become valuable star employees.

C. Employees feel supported and respected.

D. Employees who enjoy their work will do it well. Happy employees have the ability to rise above the ordinary. They become productive, long-standing employees, and everyone benefits from their longevity: doctor, patient, co-workers, the practice.

### Step 2: Plan Ahead: Questions to Ask Yourself “Pre-Review”

*Time for a little introspection.*

A. What are you willing to do to make this process successful?

B. How familiar are you with each employee’s role and responsibility in the practice?

additional training?

F. What is the next phase if under-performers continue to miss their mark after supportive measures are taken?

G. Do you have set standards established that determine wage and benefit increases?

### Step 3: Prepare in Advance, and Focus

A. Don’t put off conducting each employee review. Make the time in your schedule. It is that important.

B. Take a sincere interest in their work effort. If YOU don’t care about how they are doing, how do you expect them to care enough to boost their effort to achieve your preferred outcomes?

C. Complete a written performance review in advance of a face-to-face meeting with your employee to keep your conversation focused and on track.

D. Assess their job description. (Does it match their skills and personality?)

- Has their job description changed in the past year? Have these changes added value to the practice?

- What additional tasks over and above their written job description have they taken on during that time?

E. Are their personality attributes a good fit in the practice?

F. It is beneficial to also require employees to complete and return a self-assessment (similar to the one you complete) prior to your meeting, so discussion can include contrasts and parallels of work accomplishments and opportunities expressed by both parties.

### Step 4: Deliver with Fairness and Honesty

A. Never go into this meeting pre-

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paring to use it as a “dumping ground.” Resist the temptation to assert any statements that are untrue, misleading, or defamatory. Putting the employee on guard will not play out well. A negative mindset sets a destructive tone.

B. Be fair; refrain from comparing one employee’s efforts to another’s. While their individual methods might differ slightly, your emphasis should be on the successful completion (or incompleteness) of their tasks. They will appreciate the autonomy.

C. Deliver all comments with HONESTY. This is the time to be truthful and address any poor behavior and/or activities. In some cases, this may be hard (may even feel confrontational), but avoidance will only lead to their continued poor behavior (and your ongoing headache!). Recognize that contradictory words and actions have consequences. For example, saying an employee’s work is less than acceptable while also giving them a pay raise sends a mixed

message. Besides that, it creates little incentive for them to do better.

D. It is the perfect time to applaud accomplishments, great and small. Share compliments about them that you may have heard from patients and good deeds they feel have gone unnoticed.

- Praising good behavior encourages repeat behavior.
- Make your overall delivery approach one of LOUD praise and soft criticism.

### **Step 5: Engage with Employees**

A. Avoid doing all the talking. You want to incite a discussion (dialogue), not a lecture (monologue). When you talk, you’re just repeating something you already know. When you listen intently, you learn something new.

B. A two-way conversation could begin by examining their self-assessment survey together. It serves as a lead-in for dialogue revolving around their key performance, abilities, untapped skills, happiness levels, overall contributions to the practice, job analysis, and mutual

expectations of their job.

C. Accurately tackle any problems with fact, not innuendo or gossip. Determine the root cause and work together on how to resolve existing difficulties.

D. Asking for their input/response invites unique perspective as well as innovative ideas that could fuel increased productivity. Suggested questions to get the ball rolling:

- Are they comfortable doing what they do?; are they suitable for the job requirements; does their job positioning make the most use of their talent?
- What is the favorite/least favorite part of their job?
- Is there a specific area of their job that they’d like to develop or find particularly challenging?
- Are any special “tools” or technologies missing that might make their job easier, more fulfilling, more productive?
- Do they find the work culture enjoyable (or difficult?) Do they have any suggestions for change?
- Does their work provide enough

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challenge and emotional incentive to keep them interested?

- If staffers were given the proverbial “Magic Wand,” what changes would they make that would support/help/improve current work conditions?

### **Step 6: Create a Results-Driven Action Plan**

*“Done well, performance management is the most effective tool for leaders to set challenges and deliver recognition—using tools like goals, feedback and coaching.”*

*—Dan Ariely, Professor*

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**“Performance management isn’t just up to the boss—employees (and leaders) shouldn’t be afraid to ask for feedback.”**

**—Laura Trice, author and speaker**

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A. Set and share goals moving forward that will quantify, acknowledge, and control progress. Incorporate individual employee goals into the principal practice goal(s). To be effective, set goals that are SMART (Specific, Measurable, Attainable, Realistic and Timely).

B. Follow-up is essential.

- Planned goals without appropriate follow-through only lead to dead-end and disappointing results.
- Work that has adequate training and supervision, supportive feedback, a daily dose of “on-the-spot” corrections, task outcomes monitored for accuracy, and acknowledged achievements are instruments of success.
- If applicable, schedule a deadline to re-assess, discuss progress, and recognize improvements for those job activities that needed fine-tuning.

C. Individual, unbiased employee performance reviews should be conducted annually and privately by a qualified Office Manager and/or DPM (or both), preferably at each employee’s work anniversary, with necessary coaching guidance afterwards.

### **Step 7: Plan Your Approach to the Finish Line**

A. Document discussion points, projected outcomes, and monitoring guidelines.

B. Performance reviews should NEVER be the sole indicator of wage increases, bonuses, etc. Employees or employers should never enter a review with these unrealistic expectations as they only lead to resentment—or worse. NOTE: Re-read this bullet point as many times as is necessary to absorb its significance!

- By the same token, excellent performance should not go unnoticed or unrewarded.
- If justified, entitlements (raises, benefits etc.) should be based on pre-determined performance standards as specified in their Practice Employee Manual or Handbook.

C. At the completion of the verbal Employee Perfor-

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mance Review, both employer and employee sign a written copy. The original is saved in the employee file and the employee is provided with a copy. This review can resurface as a progress-marker the following year.

## Final Thoughts

*“Performance management metrics aren’t just historical, but they are also forward-looking projections so that managers can know who has a positive trajectory.”*

—Dr. John Sullivan

1. Effective communication habits pay off! Actively listen, ask questions, encourage questions, learn.
2. Always work towards a positive exchange. If employers want the meeting to be valuable, it cannot JUST be about their needs, their wants, their own expectations. It must be a justly conducted, mutually rewarding experience.
3. Keep in mind that written evaluations summarizing an employee’s negative actions or habits can be helpful documentation for the practice in the event of dismissal disputes that involve litigation.
4. Performance reviews are not about focusing on the past (what employees have done wrong), but more so to shape the future (by working together to improve their skills and effectiveness).
5. Consider conducting a 360 Review to discover ways in which you can become a better manager/employer.
6. As an employer, it is true that performance reviews demand a certain amount of your time and energy; however, when combined with other fundamental management strategies for improvement, you will get out of them what you put into them. Don’t expect more until you do more.
7. Remember, while you may be the greatest, most charming clinician on the planet, prospective patients may never know, as they are likely to experience several staff interactions before they ever get to meet you, face-to-face. Patient experiences (good or bad) are a reflection on you. A quality staff = a quality practice. That’s the prize worth claiming.
8. Lastly, be an inspiration and lead with kindness and truthfulness!! Indifference and dishonesty are reckless and cause .....  
confusion. **PM**

## Reference

<sup>1</sup> Zippia. “20 Essential Employee Feedback Statistics [2023]: Employees Want More Than Just Performance Reviews” Zippia.com. Feb. 1, 2023, <https://www.zip-pia.com/advice/employee-feedback-statistics/>



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