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# IDEABRIDGE



The IdeaBridge White Paper Series:  
Establishing Performance Standards

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## ESTABLISHING PERFORMANCE STANDARDS

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### Summary

These detailed Performance Guidelines and Checklist will speed-up your development of performance guidelines tailored specifically to your company's unique culture. This Checklist includes much of the leading thought on establishing a performance-based culture and should serve as a strong guidepost for directing daily actions to ensure that they are consistent with your Strategy. Users of the Checklist need only to check those boxes that they would like to integrate into their own planning.

### Leadership

- Consistently work and act in a manner which identifies you as a Leader of the Company. Regularly work to improve your skills as a Leader. Read appropriate books, listen to audio tapes, seek advice and counsel from those leaders which you respect. Review "The Leadership Imperative" regularly.
- Delegate as many of your routine activities as possible in order to free-up time for your leadership responsibilities. Focus on longer-term matters, your Department's goals and objectives, personnel issues, the training and development of your team, recruiting, new business and customer retention, planning, personal growth and development.
- As a Leader in your company, you play a vital role in supporting and maintaining the corporate culture, which can be generally defined as: (See Mission Template)
- A clear focus on our core business of \_\_\_\_\_; Aggressive New Business Development; A strong work ethic; strong cost-control culture; aggressive and proactive customer retention; customer service; teamwork; corporate citizenship; unwavering personal integrity; a competitive spirit; a sense of urgency; a culture that embraces changes with a laser-like focus on building a business and maximizing value.
- As a Leader, you ultimately must take responsibility for any setbacks or failures of the team. However, remember that successes are primarily due to the team's efforts and you should readily give them credit for their achievements.
- Maintain ongoing recruitment for potential hires and maintain a clear succession plan for your business unit.
- Always be thinking several steps ahead. Plan carefully for contingencies and have alternative strategies developed well in advance of potential problems. As a Leader, you are encouraged to come prepared with various solutions, options and recommendations when presenting a problem or opportunity to senior management.
- At times, Leaders must make decisions which are unpopular; have the courage and the common sense to do the "right" thing, not just the popular thing.

### Attitude

- Be open-minded, approachable and supportive of new ideas, programs and the inevitable changes occurring in our industry; your team should maintain a similar posture toward change.



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- Maintain a positive “can-do” attitude, be solution-oriented and creative. Look for solutions and alternatives rather than the easy decline. Give projects your full support, rather than just going through the motions with lukewarm compliance.
- Avoid being defensive toward well-intentioned advice and constructive feedback, ideas, concepts, alternatives, etc. Do not pretend to know things that you do not; encourage your team to maintain a similar position.

### **Teamwork, Cooperation and Respect**

- Remain cognizant of the fact that everyone is on the same team; support, respect and cooperate with all of your business units and support departments. As conflicts arise, seek quick resolution through a candid discussion of the issues rather than firing-off heated E-Mail messages.
- Consistently act and perform in a manner which supports and encourages teamwork and the accomplishment of Department Goals. Work diligently at fostering team spirit, not only among your direct reports, but also with the support staff, operations groups and others which assist your team.
- Leaders don’t participate in office politics, backstabbing, gossip or other loose chatter; and they don’t permit it from anyone on their team. Be known as the person who is always supportive of other business units and regions, departments and employees.
- Ensure that your team actively supports other departments and regions by referring opportunities wherever appropriate. Further, ensure that your team maintains excellent working relationships with all of our support groups at all times.

### **Setting Standards and Monitoring Performance**

- Consistently exemplify and adhere to our industry’s highest standards of integrity, customer service, courtesy and professionalism in all your dealings with employees, support staff, customers, referral sources and prospects.
- Set the standard and a consistent example of personal responsibility and accountability. Make it crystal clear that you will accept nothing less than the highest ethical standards.
- Give employees continuous feedback about their progress as measured against their annual plan and the Department’s annual goal. Promptly advise your manager of any potential performance problems or issues. An employee who is “surprised” at their year-end review is a personal failure. Yours. I don’t ever want to hear about performance issues unless you have first discussed it with the employee.
- Set high standards for your team and hold them accountable for their commitments to you. Maintaining high standards leaves no room for third and fourth chances or “beating around the bush.” You must be fair, supportive and show them how they can be successful, but your feedback must also be timely and candid.



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- Provide account officers with quick, accurate feedback regarding shortfalls in their performance and effectiveness, then explain exactly what is expected for them to improve. If improvement is not seen or is stymied by a poor attitude, a formal (written) counseling must be performed with the assistance of your manager and the Human Resources Department.

### Improving Productivity

- A unit which falls behind Plan for any reason, must quickly develop a realistic Action Plan for improving the situation. It's not enough to say, "We'll look into it." We must have a specific plan with action-items and a timeline for its achievement.
- Focus on improving productivity and set reasonable deadlines that your team must adhere to. Quickly act to clarify expectations and responsibilities of anyone who is not performing to expectations. Make it clear to the team that they will not be measured by the hours that they work, but rather by the level and quality of their productions.
- Constantly review the Goals, Performance Guidelines and our objectives with the team so that everyone remains focused on the Department's agenda. Teach your team to concentrate on staying focused on the most important tasks that will yield the greatest tangible results for the Department.
- Teach your team to maximize their time and efforts by focusing on those opportunities where you have the best chance of landing the business, rather than spending time on "long shot" deals. If a deal is clearly outside the parameters of what you're comfortable with or willing to do, pass on it quickly!
- Encourage your team to constantly suggest ways to improve our process, increase productivity and reduce costs. Regularly solicit ideas from your team. Encourage your team to embrace new ideas which could reduce costs, increase efficiency or improve productivity.

### Communication

- Remember that as a Leader, your employees will be watching you very closely. It has been said that up to 80% of communication is non-verbal. Be constantly mindful that your attitude, pace, style, frame of mind and your reactions to daily situations will have a dramatic impact on the people you lead.
- Keep your manager constantly informed about all-important issues occurring in the Department; never cause your manager to be surprised or caught-off-guard; keep him informed.
- Employees can't perform effectively until they know exactly what is expected of them. Don't leave your team to figure out things on their own. Get rid of ambiguity and nail down every person's responsibilities with clarity and precision.
- Communication gaps can cause you trouble, so don't leave an information vacuum. Bad news, rumors and gossip will fill the communication void. If you get lazy or careless about communication, your team will lose their bearings and will start to drift. In times like these, even no news, is news.



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### Personal and Team Development/Training

- Continually improve your leadership, sales, time management, negotiation and planning/organizational skills. Seek advice, seminars, books and classes to ensure that your skills are among the best in the industry. Be proactive in seeking the same for your team.
- Teach your team to plan several months ahead in order to leave plenty of time for unexpected problems. During times like these, the pace quickens, work moves at a faster tempo and problems can hit in a hurry. You need to be in a position where you are nimble and have built some flexibility into your schedules.
- Work with your team to get them comfortable with negotiating deal structure, pricing, fees etc. Be proactive in demonstrating how you expect your employees to serve our customers and negotiate with prospects.
- Work alongside your team to support them in their efforts to ensure that 100% of all existing desirable relationships are retained.

### Unacceptable Business Behavior

- Failure to meet commitments...any commitments, whether it's a one-page memo or a \$20 Million sales goal, commitments must be kept.
- Failure to immediately face reality if commitments are impossibly behind.
- Making excuses for your people or for your lack of performance.
- Failure to quickly deal with employee issues.
- There will be no boot licking or apple-polishing – Forget it! Sucking-up to the boss, any boss, is forbidden here. There will never be favoritism based on favors, so save your time! Recognition will be squarely based on having a great attitude, a strong customer orientation and results. Period.
- There will be no excuse for being late to meetings.
- Passing the buck or saying, "It's not my job!"
- Playing any kind of company politics or the formation of internal cliques or turf zones.
- Backs-tapping, loose chatter.
- Shoddy analysis, "half-baked" proposals and lazy-thinking. (Come prepared or reschedule!)
- Lack of candor. Weasel language. Failure to tell it exactly as it is.
- Shading the truth or Rounding-the-Corners.



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- Failure to promptly and immediately deal with problems.
- Failure to put the customer first in our decisions.
- Failure to properly balance customer requests with our need to make money.
- Asking your boss to make *your* decision.
- Long-winded memos and write-ups. (Get to the point. Be succinct. Be intellectually honest and be direct.)
- Excuses of any kind. Take full and complete responsibility for your team and yourself. Accept the consequences for your actions and quickly move on.
- Wasting time. Anyone's time...yours, your bosses, a co-worker's, a customer's. Do not waste anyone's time.
- Any kind of favoritism or allowing emotion drive decisions, rather than sticking to our chosen strategy.
- Back-office politics, gossip or scheming to revenge a political enemy within the company.
- Failure to immediately deal with deteriorating situations.
- Failure to aggressively negotiate on behalf of the company for rates, fees and terms. Never leave money on the table because you are too timid to ask.
- Wasteful or unnecessary expenditures of any kind.
- People who are too timid to say, "No!" to vendors, sales people and solicitors of any kind.
- Turf building, turf protection, empire building of any kind.
- Not treating everyone in our company with care, kindness and respect for their opinions, regardless of title.
- The filtering of information up through the ranks. Anyone can talk to anybody at this company. Period. Do not prevent people from going over your head, their direct opinions, unfiltered are always welcome.
- Covering up a bad situation with fancy charts, colored graphs, long memos, etc. Get straight to the bad news and lay out your recommendations while you've still got time. But never, ever, hold back the bad news. Give it to them straight.
- Failure to be proactive and to plan ahead.
- A sour, bad attitude that is detectable over the phone or in face-to-face meetings with customers is completely unacceptable.