

How to Coach Staff Throughout the Year

Kate Vonderhaar
VonderhK@advisory.com

Performance Reviews 101

Two-part Webconference Series

How to Evaluate Staff Performance Fairly and Accurately

January 15

Available on-demand [here](#)

How to Coach Staff Year-Round (Not Just During Reviews)

Today, January 29

Available on-demand
following today's session

What We're Aiming for: Annual Review as Summary of Ongoing Conversations

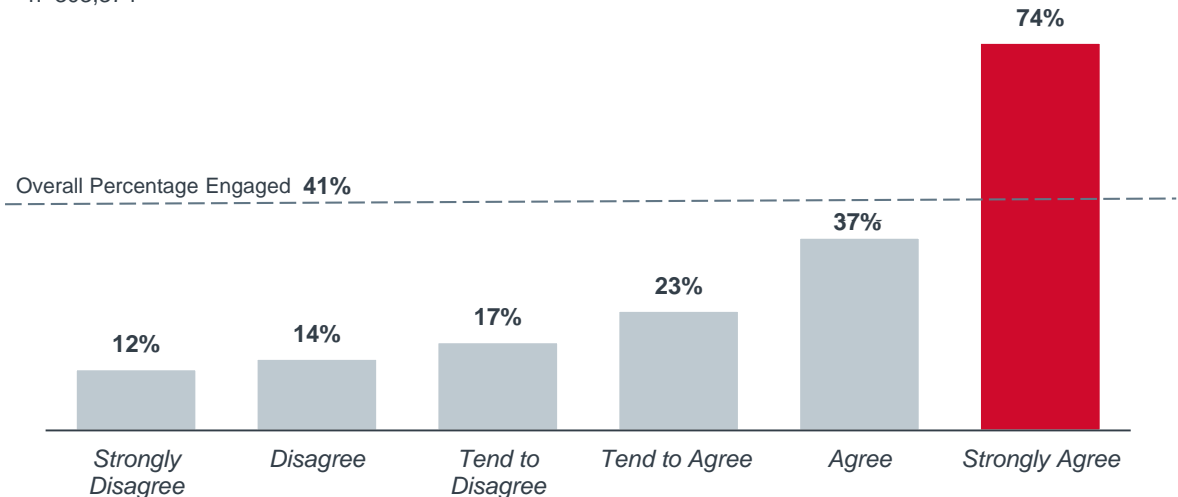
Performance Management Time Spent on Annual Review



The Case for Year-Round Feedback

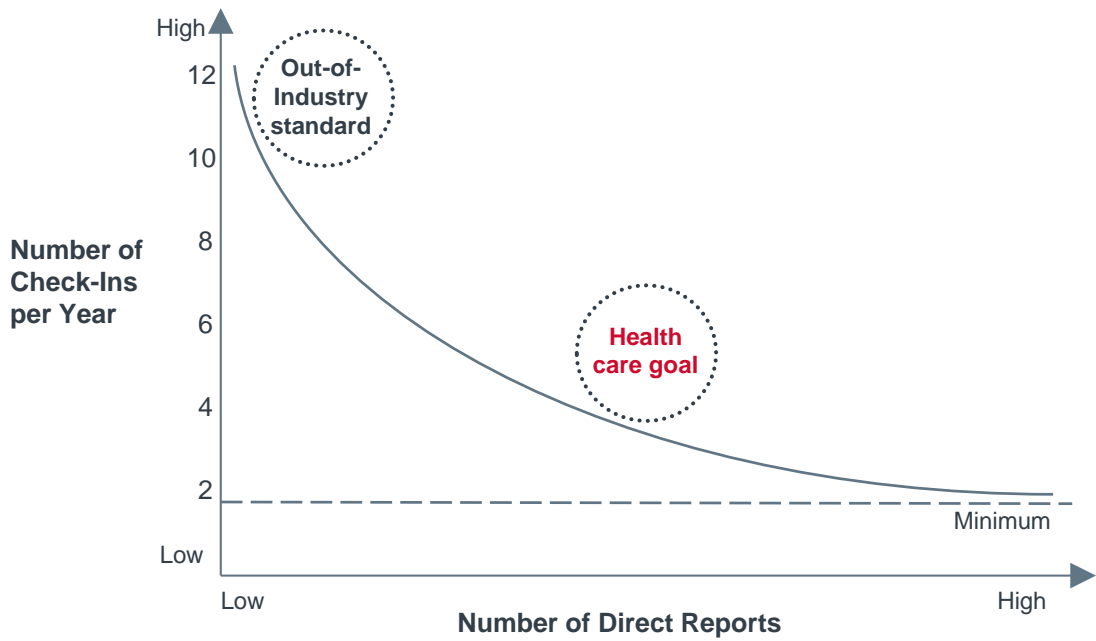
Percentage of Frontline Staff Engaged by Agreement with the Statement,
“I Receive Regular Feedback From My Manager on My Performance”

n=303,374



Setting a Reasonable Goal for Check-in Frequency

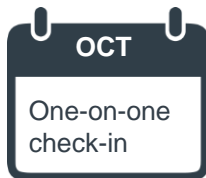
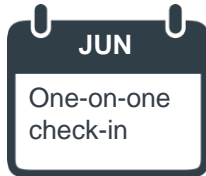
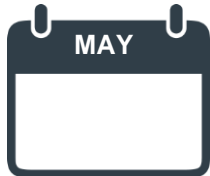
Feasible Number of Check-Ins per Year Based on Span of Control



What a Year Might Look Like for a Team Member

Minimum Cadence of One-on-One Check-Ins

Representative Timeline



Finding Regular Opportunities to Share Feedback



Schedule a Regular Check-in with Each Team Member

Pick a cadence (e.g., once a quarter) and schedule check-in with each team member



Other Opportunities for Feedback

- Rounding
- Team meetings (appropriate for coaching team on overall team performance, or publicly recognizing individuals)
- When else?

What's the Conversation You Need to Have?

Questions to Help Identify the Type of Conversation

Needs Improvement

Who on my team is...

- Consistently falling short of expectations?
- Bringing down performance of others?

~ 10%

Valued Contributor

Who on my team...

- Do I trust to do their job everyday?
- Is a reliable team player?

~ 70%

Top Performer

Who on my team...

- Is a natural leader to everyone else?
- Would I go to if I need to get something done well?

~ 20%

A Road Map for Sharing Difficult Feedback

Performance-Expectation-Consequence (P-E-C) Message Components

	Think About	Example
<p>P Is for Performance</p>	<p>What did your employee do that led him or her to fail to meet performance standards?</p> <p>Cite specific examples of actions or behaviors that you observed.</p>	<p><i>Ned is a nurse in the cardiovascular unit. Last Tuesday he left work 20 minutes early without explanation. He missed the unit huddle and failed to pass information to nurses on the next shift.</i></p>
<p>E Is for Expectation</p>	<p>What is the standard that you expect your employee to meet?</p> <p>Explain your expectations using examples of the behavior or actions the employee should demonstrate.</p>	<p><i>I expect Ned to complete his full shift and not leave without explanation. I also expect Ned to stay for the unit huddle and give detailed information about his patients (including status updates, recent medications, and expected visitors) to nurses on the next shift.</i></p>
<p>C Is for Consequence</p>	<p>What is the consequence of your employee not meeting the standard you expect?</p> <p>Describe how his or her failure to meet standards impacts your team and/or the organization.</p>	<p><i>Since Ned left early he did not have time to tell Tania, a nurse from the second shift, that one of his patients had a visitor coming that evening. Tania took the patient to X-ray and he missed his visitor. The patient and his visitor were very unhappy about this.</i></p>

An Example of the Road Map in Action

Road Map	Sample Talking Points	Example
Start	<ul style="list-style-type: none"> • I'd like to talk with you about... • I have noticed... • I am concerned about... • I want to discuss... • I have some thoughts about... • I feel I need to let you know... 	<p><i>I would like to talk with you about when you left work early last Tuesday.</i></p>
Share P-E-C Message	<p>P: Cite specific examples of actions or behaviors that you observed.</p> <p>E: Explain your expectations using examples of the behavior or actions the employee should demonstrate.</p> <p>C: Describe how his or her failure to meet standards impacts your team and/or the organization.</p>	<p><i>P: I am concerned about this because you missed the unit huddle, and you didn't let me know that you would be leaving before the end of your shift.</i></p> <p><i>E: I expect you and everyone on our team to complete the full shift. I also expect you to stay for the unit huddle so you can pass along the necessary information about your patients to the next shift.</i></p> <p><i>C: Since you left early and missed the huddle, Tania didn't know that one of your patients had a visitor coming that night. She took the patient down to X-ray and he missed his visitor. The patient gave Tania a hard time when he found out he missed his visitor and his visitor complained to me.</i></p>

An Example of the Road Map in Action, Continued

Seek Input

- What is your view of this situation?
- What are your thoughts?
- Why do you think this happened?
- What do you think you can do to improve?
- How could you have handled that situation differently?

How could you have handled that situation differently?

Please tell me your thoughts.

Wrap Up

- I'd like to help you address this issue by...
- How can I best support you...?
- I expect you to [change the behavior/action]...
- Let's meet again [next week, month] to follow up about...

I expect you to not miss any more staff huddles or leave a shift early unless you first talk with me about your situation.

Let's meet again next week to discuss how we can both make sure this doesn't happen again.

What's the Conversation You Need to Have?

Questions to Help Identify the Type of Conversation

Needs Improvement

Who on my team is...

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~ 10%

Valued Contributor

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Questions to Discuss During Feedback Conversations

Tool: Guide for Valued Contributor & Top Performer Conversations

Questions for Valued Contributors and Top Performers		
Ask staff member:	Note staff member's response here:	Offer your thoughts, using the scripting prompts here if you like:
What achievements are you most proud of since the last time we spoke?		<i>"You've really made a difference by..." (Highlight at least one specific action the staff member has taken since the last time you spoke has positively impacted the unit's performance goals.)</i>
What strengths contributed to your success?		<i>"I perceive your greatest strengths to be..."</i>
What challenges did you face and how did you overcome them?		<i>"Thank you for sharing. How could we have made those challenges easier to manage?"</i>



Full Tool Available

Additional Question for Top Performers		
What is the one thing that would make your job more satisfying?		<i>"For example, I was thinking you could play a big role in..." (Share an upcoming project or opportunity that would be a good fit for this person.)</i>

Invite Team Members to Reflect Before Your Check-In

Sample Email

Hello *[name]*,

I'm looking forward to touching base to discuss your performance since our last conversation. I'm writing to share a few questions in advance so you have a sense for what I'm hoping to discuss. There's no need to write anything formally for our conversation, but I'll look forward to hearing your thoughts!

1. What achievements are you most proud of in the last several months?
2. What strengths have contributed to your success?
3. What challenges have you faced and how did you overcome them?
4. What is one area you would like to improve on?
5. What are your professional goals (either short-term or long-term) and how can I support you in achieving those goals?

All the best,

[name]

Take Notes Throughout the Year

Choose a System for Keeping Notes in One Place

Systems to consider:

- Email folder per team member
- Excel file with tab per team member
- Word document

Regularly Remind Yourself to Jot Down Notes

File quick notes when a team member:

- Displays a competency—or doesn't
- Receives feedback from a patient or family member
- Receives feedback from a colleague
- Provides an effective idea for process improvement
- Takes on a formal or informal role as a mentor to less-experienced staff
- Leads a project, committee, or taskforce

File quick notes when you:

- Give specific feedback to a team member
- Notice a pattern (good or bad)

For each note:

Include the date and 2-3 sentences of details to jog your memory. The more you write along the way, the less you'll have to write at the end!

A Convenient Starting Place

Representative Example of a Standard Template to Track Staff Performance

	A	B	C	D	E
1	Employee:	Karen Simmons			
2		Miscellaneous Notes:	Category:	Strength	Development Opportuni
3			Customer Service	1	0
4			Teamwork	0	1
5			Clinical Excellence	1	2
6			Professionalism	1	0
7			Innovation	2	1
8			Communication	1	3
9			Resource Stewardship	2	0
10					
11	Date		Comment	Value/Category	Comment Type
12	1/15/17	[sample comment]	Customer Service	Strength	
13		[sample comment]	Teamwork	Development Opportunity	
14		[sample comment]	Clinical Excellence	Development Opportunity	
15		[sample comment]	Professionalism	Strength	
16		[sample comment]	Innovation	Strength	
17		[sample comment]	Communication	Development Opportunity	
18		[sample comment]	Resource Stewardship	Strength	
19		[sample comment]	Clinical Excellence	Strength	

Tallies number of Strength and Development Opportunity comments for each category.

Different tab for each direct report.

“

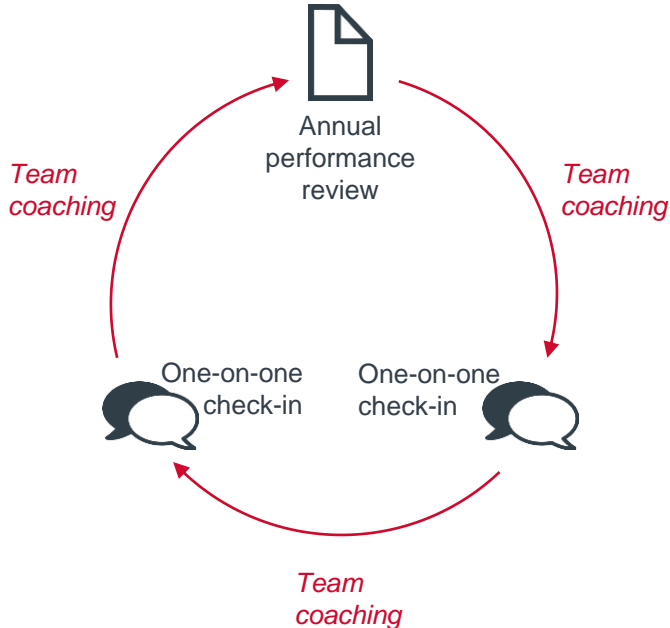
“Tracking performance throughout the year helps me write my reviews more easily. It makes them more accurate so the conversations are better. *Nurse Manager
Hospital on the East Coast*



**Full Ongoing
Performance
Tracker Available**

Not All Coaching Needs to Happen in 1:1 Check-Ins

A Doable Way to Provide Year-Round Feedback: Supplement One-on-One Check-ins with Team Coaching



Use Huddles to Give Regular Feedback on Team Goals

Steps to Provide Regular Feedback to Teams on Interim Goals in Team Huddles

1

Communicate the Interim Goal the Team Should Focus On:

Break longer-term goals into achievable, bite-size interim goals



2

Link the Interim Goal Back to the Annual Goal:

Tie the interim goal back to the longer-term goal the team has to achieve to help staff see the importance of the interim goal



3

Solicit Staff Suggestions on How to Make Progress Toward the Interim Goal:

Ask staff for suggestions on how they can improve performance to reach the interim goal and any roadblocks the manager can address



4

Acknowledge Progress Toward the Interim Goal:

Shares successes the team has had so far

Communicating Interim Goals Daily at Baptist Memorial Hospital-Collierville

How Med/Surg Manager Used Team Huddles to Work Toward Longer-Term Goal of Improving HCAHPS Scores

1 Communicate the Interim Goal the Team Should Focus On:

Reduce call light response time

2 Link the Interim Goal Back to the Annual Goal:

Improve HCAHPS scores

3 Solicit Staff Suggestions on How to Make Progress Toward the Interim Goal:

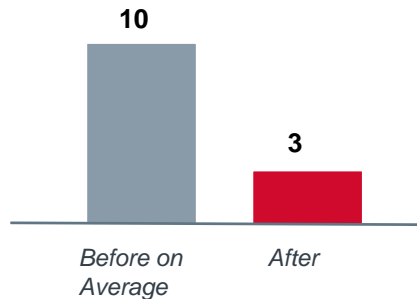
Ask staff for barriers to reducing call light response time

4 Acknowledge Progress Toward the Interim Goal:

Share successful strategies, recognize nurses with lowest response time

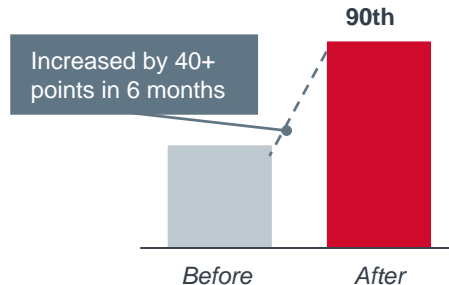
Call Light Response Time in Minutes

Before and After Focusing on Patient Experience



Unit Patient Experience Percentile Score

Before and After Focusing on Patient Experience



Communicating Interim Goals Daily at Baptist Memorial Hospital-Collierville



Case in Brief: Baptist Memorial Hospital-Collierville

- 81-bed hospital; headquartered in Collierville, Tennessee
- In 2016 as part of Lean's KATA training a med-surg nurse manager worked to increase patient satisfaction scores for "responsiveness of hospital staff" from the 20th to 30th percentile to at least 80 percent patient satisfaction by specifically focusing on call light response time
- To engage frontline staff in the process, the nurse manager started every team huddle by updating staff on call light response time using the unit priority board and tying the results back to HCAHPS
- Staff wrote barriers to reaching patients quickly on the board as well as their "time" reaching patients; staff who beat the target time were rewarded
- In six months, call light response time was reduced to three minutes or less and the unit patient satisfaction scores increased to the 90th percentile

Top Five Tips to Remember

- 1** Aim for at least two 1:1 check-ins with each team member outside of the annual review
- 2** Figure out what kind of conversation you need to have: Are you talking with someone who is a solid contributor or a top performer, or someone who needs to improve performance?
- 3** Give your team member a heads-up about what you're hoping to discuss in the check-in
- 4** Choose a system to keep track of feedback, and stick with it! (Remember how much easier it will make writing annual reviews)
- 5** Look for opportunities to coach your team on overall team performance

Resources to Download



List of Questions to Discuss During Check-ins

Use these questions to guide conversations with team members who are solid performers and top performers



Feedback Tracker

Customize this Excel template to track the individual feedback you share with team members



Resources available [here](#) on Advisory.com