The
Performance
Conversation Guide

Everything you need to start talking about team performance at work

joyous

Contents

Organisation success depends on teams achieving their objectives, not on how well individuals perform.

Let's talk about team performance

We're probably all a bit too familiar with the annual performance review. It's essentially a monitoring exercise focused on individuals. How much have you produced? What did you achieve? How can you do better next time?

But performance is about more than the individual. It's really about how well teams meet their objectives; how well teams produce and what teams achieve. Individuals play their roles within their team, but organisation success hinges on team success more than anything any one person can do.

So how do we move beyond monitoring individual output to enabling teams to successfully achieve their objectives?

Take a look at objective-focused frameworks, like Management by Objectives (MBO) or more recently Objectives and Key Results (OKR).

These frameworks involve defining objectives and success indicators that carry through the organisation: strategic objectives translate into team and individual goals.

Objectives are revisited and re-defined regularly and will (ideally) involve input from the entire organisation. This ensures that everyone's aligned with an objective, knows what they need to do to help achieve it, and has the skills and resources necessary to do so.

Performance management then becomes a continuous process, as regular check-ins are necessary to make sure objectives stay on track.

What does that look like?

To significantly oversimplify the process:

1. Set objectives collaboratively: For the organisation and for the teams within it

2. Talk - continuously - about the objectives: Are they still realistic and achievable? Are there any blockers? Have priorities shifted?

3. Review the objectives: Were they achieved? Were the results as expected? What have you learned for next time?

4. Do it all again.

If you're using performance reviews to determine compensation, then OKR (for instance) isn't a direct replacement. Objectives are supposed to stretch teams and drive innovation, and by their very nature some may be too ambitious to achieve fully. If you use that as an excuse for lower compensation, you may have some very unhappy people on the team.

People will also be doing things in the course of their work that doesn't directly feed into one of your three-to-five objectives, so that work won't be captured when you discuss objective achievement.

Does that mean individual performance reviews still have a place?

We'd argue that this means you need to talk to your team about more than just their progress towards objectives. Talk about their learning and development. Talk about their wellbeing, the things that excite them about their work, and the things that get in the way.

In short, help them do the work that will enable the organisation to achieve its objectives. Put far less energy into evaluating their performance after the fact.

Performance reviews suck

Everyone's got their own performance review horror story. Here's mine.

At a previous company, the entire team (and we're talking all of the employees) - got an anonymous form asking for feedback about everyone else in the company. Off to a good start.

On the day of my review my manager and my manager's manager met to discuss the feedback. They talked about me, and decided what they wanted to do about me. And then they called me in to talk to me about it.

They had drawn up an A3 sheet of paper with the three areas I needed to improve and asked me how I would go about it. It was all fairly meaningless. Those three areas didn't relate to anything the company was trying to achieve. Nobody followed up afterwards to see how I was progressing, and they certainly couldn't follow up with anyone who gave feedback to see what they thought. The box was ticked, and everyone moved on.

This kind of performance review is supremely unhelpful. It won't result in any kind of meaningful improvement in organisation performance, and it's no good for the people involved either.

Anonymous feedback lacks context, so you don't know who said what about you, which means it's hard to know what's most important to focus on. All this kind of performance review is good for is making people anxious and stressed.

It's time to make performance enablement the focus

Backwards-looking individual performance reviews don't get results. Is it more useful to know who met expectations in the past year, or to enable as many people as possible to achieve objectives now and in the future? Gartner found that organisations with forward looking reviews improve employee performance by up to 13%, and ongoing feedback instead of episodic improves performance by up to 12%.

How do you enable performance?

At the strategic level, agree every three months on the specific strategic outcomes you want to see (at a top-level, i.e. 1-2 sentence outcomes). Every department or team should have a clear way of contributing to these outcomes. If you're not sure what that looks like, it's a good idea to set goals in consultation with the people who will do the work.

Once the strategic objectives have been set, teams should know what they need to do to achieve them. Team leaders are responsible for communicating requirements to their teams. Everyone in the team should understand what they need to do to achieve the objectives - and be able to do it. If they need additional assistance. upskilling, or resourcing, then that should be clearly communicated.

As people go through their work days, they now have a framework for considering the tasks they're working on. Because they know what contributes to the team goals, and how that contributes to the organisation's goals, it's easy to focus on the things that actually matter. Are you doing things that contribute to the strategic outcomes? Or do you need some help to get back on track?

Which isn't to say people won't have work to do that's outside the current objectives! But knowing what the key objectives are should stop a certain amount of scope creep when it comes to projects. Business as usual is still business as usual.

Top down or bottom up?

You'll know what works for your organisation. At Joyous we developed our strategic objectives in consultation with team leaders then communicated them back to everyone in the business. In other organisations the senior leadership will decide the company's goals and those will cascade down. In still others, teams will decide their objectives and then those will roll up into strategic direction.

However you set your goals, communication is key to making sure everyone's aligned. Team members know better than anyone their capacity and capability to get the work done. Business leaders understand the competitive landscape and financial needs of the company. Somewhere between those two is the ideal set of objectives.

Talking about these things is super important. That's where this performance model comes in.

https://www.gartner.com/smarterwithgartner/motivate-employees-with-ongoing-forward-looking-feedback/
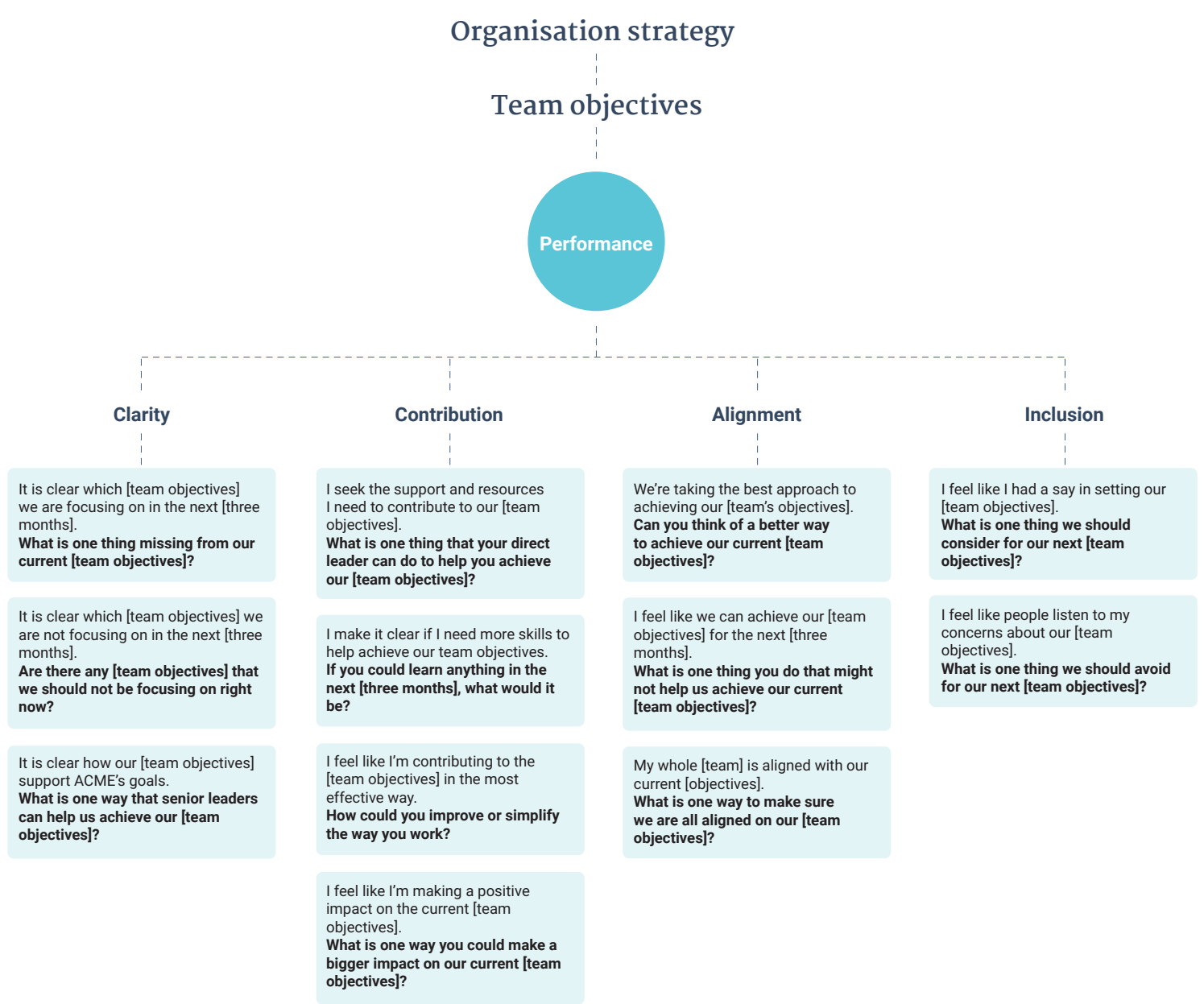
The Joyous Performance Model

Traditional performance models focus on measuring and monitoring individual performance. At Joyous, we believe performance is fundamentally about the team, and that what's most important is meeting objectives that every team member is aligned with and contributes to.

We break performance into four sub-categories, all of which are centred around the team objectives. They are **Clarity, Contribution, Alignment**, and **Inclusion**.

Before using this conversation set, organisations should have a three-month strategy that has been clearly communicated to teams. Teams objectives need to align with this strategy.

Organisation strategy

Team objectives

Performance

Clarity

It is clear which [team objectives] we are focusing on in the next [three months].
What is one thing missing from our current [team objectives]?

It is clear which [team objectives] we are not focusing on in the next [three months].
Are there any [team objectives] that we should not be focusing on right now?

It is clear how our [team objectives] support ACME's goals.
What is one way that senior leaders can help us achieve our [team objectives]?

Contribution

I seek the support and resources I need to contribute to our [team objectives].
What is one thing that your direct leader can do to help you achieve our [team objectives]?

I make it clear if I need more skills to help achieve our team objectives.
If you could learn anything in the next [three months], what would it be?

I feel like I'm contributing to the [team objectives] in the most effective way.
How could you improve or simplify the way you work?

I feel like I'm making a positive impact on the current [team objectives].
What is one way you could make a bigger impact on our current [team objectives]?

Alignment

We're taking the best approach to achieving our [team's objectives].
Can you think of a better way to achieve our current [team objectives]?

I feel like we can achieve our [team objectives] for the next [three months].
What is one thing you do that might not help us achieve our current [team objectives]?

My whole [team] is aligned with our current [objectives].
What is one way to make sure we are all aligned on our [team objectives]?

Inclusion

I feel like I had a say in setting our [team objectives].
What is one thing we should consider for our next [team objectives]?

I feel like people listen to my concerns about our [team objectives].
What is one thing we should avoid for our next [team objectives]?

Using this guide for conversations

This guide contains 12 unique conversations centred around team objectives. It's suited to companies with teams that set objectives on a three-monthly cycle.

Team members receive one conversation each week for twelve weeks then the cycle repeats.

This conversation contains two parts: a statement that people rate on a scale of 0 - 10, followed by a free-text conversation starter.

Conversations are designed so individual feedback gives leaders insights into team performance. They can then use this to enable the kind of behaviors that lead to the team and the organisation achieving their objectives.

The conversations do not measure, monitor, or gauge individual performance - we believe this isn't helpful and it's usually not a positive experience for team members.

At the end of the cycle a couple of questions are asked that can be used to inform setting team objectives for the next cycle.

We suggest you replace anything between [square brackets] with terms you use in your organisation. You might prefer goals, OKRs or KPIs instead of [team objectives]. You might set objectives for squads instead of [teams]. And if you set objectives more or less often than every [three months], be sure to make it clear in your conversations!

Joyous
To: Kaiyena Crow

Clarity

ACME

Kaiyena, do you agree or disagree with this statement...

It is clear which team objectives we are focusing on in the next three months.

| 0 | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 |

0 - Strongly Disagree   10 - Strongly Agree

It is clear which team objectives we are focusing on in the next three months.

7

What is one thing missing from our current team objectives?

I think the project focus makes sense, but I wonder if we could include something on bringing tech up to spec. It'd be a good idea to do that now so things don't get worse later!

Add a comment

I think the project focus makes sense, but I wonder if we could include something on bringing tech up to spec. It'd be a good idea to do that now so things don't get worse later!

Yeah, good point. I think we get so busy with the work we forget to look at the things that help us get it done! I'll see where we have scope.

It would be a big help. I know you're busy too, but we'd appreciate it.

Happy to help! Let's discuss with the others at tomorrow's team meeting.

Conversations

Clarity

Do people know which objectives they're working towards – and which they're not?

1 **It is clear which [team objectives] we are focusing on in the next [three months].**

What is one thing missing from our current [team objectives]?

2 **It is clear which [team objectives] we are not focusing on in the next [three months].**

Are there any [team objectives] that we should not be focusing on right now?

3 **It is clear how our [team objectives] support ACME's goals.**

What is one way that senior leaders can help us achieve our [team objectives]?

Helping people get a sense of clarity on objectives

Leaders should work with their teams directly to make sure everyone understands not only what the team should be working on, but how these things contribute to outcomes for the organisation. This is a good time to prioritise tasks: decide what projects don't directly contribute to this period's goals and move those to a not-to-do list. That doesn't mean they're not important! They're just not the most important things to be working on right now.

Contribution

Do people have what they need to contribute to the team objectives?

4 **I seek the support and resources I need to contribute to our [team objectives].**

What is one thing that your direct leader can do to help you achieve our [team objectives]?

10 **I feel like I'm making a positive impact on the current [team objectives].**

What is one way you could make a bigger impact on our current [team objectives]?

9 **I feel like I'm contributing to the [team objectives] in the most effective way.**

How could you improve or simplify the way you work?

5 **I make it clear if I need more skills to help achieve our team objectives.**

If you could learn anything in the next [three months], what would it be?

Enabling contribution

If people can't contribute to the team's goals, it's going to be really difficult to achieve them! Sense-check the goals when setting them with your team, and check in regularly throughout the 12-week period. Does everyone have the resources they need? Are there any blockers you can help remove, or development opportunities you can provide? Remember also to celebrate the little wins on the way to the bigger goals. If people feel like they're making progress and their contribution is valued, they're more likely to engage.

Alignment

Do people understand and feel aligned to the team objectives?

6 **We're taking the best approach to achieving our [team's objectives].**

Can you think of a better way to achieve our current [team objectives]?

7 **I feel like we can achieve our [team objectives] for the next [three months].**

What is one thing you do that might not help us achieve our current [team objectives]?

8 **My whole [team] is aligned with our current [objectives].**

What is one way to make sure we are all aligned on our [team objectives]?

Enabling alignment

If everyone's on the same page regarding team goals and how to achieve them, then work's going to go a lot more smoothly. This is another reason why it's important to check in with your team frequently. If you discover that there's an alignment issue: people don't understand the objective, why its important, or their role in achieving it, then you can address that and get alignment before progressing. Similarly, if it becomes obvious that your team isn't able to achieve their objectives, you can take action to get things back on track before you reach the end of the period.

Inclusion

Do people feel like they've had a say in the team objectives and how they were set?

11   **I feel like I had a say in setting our [team objectives].**

What is one thing we should consider for our next [team objectives]?

12   **I feel like people listen to my concerns about our [team objectives].**

What is one thing we should avoid for our next [team objectives]?

Enabling a sense of inclusion

The people who do the work should always have a say in how that work gets done. If you've set objectives for the team without discussing it, you may find engagement suffers. You may also find people don't have the time or resources to do the work, or that they're forced to de-prioritise other important tasks to focus on the objectives. Avoiding this is easy - just involve the whole team in setting the team objectives. Give everyone the chance to contribute to the discussions, and make sure you've got buy-in from the whole team on your to-do and not-to-do lists. Be sure you also debrief with the whole team at the end of the period. What went well? What went poorly? What should you do to make sure the next period is even more successful?

Recommended conversation order

It's best to send conversations in a logical order: start by making sure everyone understands what the objectives are, then check in to see how everything's progressing. Don't forget to debrief at the end of every period: use the conversations to spark further dialog.

	Rating statement	Free-text conversation starter
1	It is clear which [team objectives] we are focusing on in the next [three months].	What is one thing missing from our current [team objectives]?
2	It is clear which [team objectives] we are not focusing on in the next [three months].	Are there any [team objectives] that we should not be focusing on right now?
3	It is clear how our [team objectives] support ACME's goals.	What is one way that senior leaders can help us achieve our [team objectives]?
4	I seek the support and resources I need to contribute to our [team objectives].	What is one thing that your direct leader can do to help you achieve our [team objectives]?
5	I make it clear if I need more skills to help achieve our team objectives.	If you could learn anything in the next [three months], what would it be?
6	We're taking the best approach to achieving our [team's objectives].	Can you think of a better way to achieve our current [team objectives]?
7	I feel like we can achieve our [team objectives] for the next [three months].	What is one thing you do that might not help us achieve our current [team objectives]?
8	My whole [team] is aligned with our current [objectives].	What's one way to make sure we are all aligned on our [team objectives]?
9	I feel like I'm contributing to the [team objectives] in the most effective way.	How could you improve or simplify the way you work?
10	I feel like I'm making a positive impact on the current [team objectives].	What is one way you could make a bigger impact on our current [team objectives]?
11	I feel like I had a say in setting our [team objectives].	What is one thing we should consider for our next [team objectives]?
12	I feel like people listen to my concerns about our [team objectives].	What is one thing we should avoid for our next [team objectives]?

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