

The Performance Management Series

How To Measure

EMPLOYEE

PERFORMANCE

By Jack Zigon

ZPG

ZIGON PERFORMANCE GROUP

IMPROVING EMPLOYEE PERFORMANCE

HOW TO MEASURE EMPLOYEE PERFORMANCE

By Jack Zigon
President, Zigon Performance Group

The logo graphic consists of a light gray triangle pointing upwards, with the letters 'ZPG' in bold black font centered within it.

ZPG

ZIGON PERFORMANCE GROUP

IMPROVING EMPLOYEE PERFORMANCE

604 CRUM CREEK ROAD
MEDIA, PA 19063
(610) 891-9599 • FAX (610) 891-9055
ZPG@ZIGONPERF.COM * [HTTP://WWW.ZIGONPERF.COM](http://www.zigonperf.com)

PUBLISHED BY

Zigon Performance Group
604 Crum Creek Road
Media, PA 19063
USA

Toll Free: 800-244-2892
From outside the US: 610-891-9599
Fax: 610-891-9055
Email/Internet: zpg@zigonperf.com
URL / Web Page: <http://www.zigonperf.com>

Copyright © 1999 by Jack Zigon. All rights reserved. No part of the contents of this book may be reproduced or transmitted in any form or by any means without the express written permission of the copyright owner.

Version 2.2
Revised July 1, 1999

ISBN 1-892809-14-1

To receive information on our on-site workshops, licensing of the examples in this publication, trainer certification and consulting services offered by Zigon Performance Group, visit our website at www.zigonperf.com or call our office at the numbers above.

Contents

Preface to the Second Edition	iv
-------------------------------------	----

How To Use This Guide 1

Who the guide is written for	1
What this guide contains	1
What you will learn	2
How to use the guide	2

Overview of Creating Performance Plans 3

How to create performance plans.....	3
--------------------------------------	---

Step 1 Review Your Organization's Goals 4

Which goals to review	4
Where to get a copy of the goals	4
What to do if these goals are not yet finalized	4
Organizational measures worksheet.....	5
What to do with the organization goals	5

Step 2 Identify the Customers of Your Position 6

Why identify a position's customers?	6
Example customer diagram	7

Step 3 List Your Position's Value-Added Results.....12

Tips for writing value-added results	15
How to check your work	18
Example of how to identify your results	19

Step 4 Weight the Results 24

Why use weights?	24
How to assign weights	24
Example weights	25

Step 5 Identify Measures for the Results 26

Example general and specific measures	27
How to create measures	28
How to use the examples and index to create measures for your position	30

Step 6 Create Performance Standards for Each Measure 39

Definition	39
How to create performance standards	39
Criteria for setting performance standards	40

Step 7 Check the Performance Plan 46

What a good performance plan looks like	46
Common problems and solutions	47

Step 8 Create a Tracking System 48

Planning How to Track Performance Data	50
Decide What Data to Collect.....	50
Decide When to Collect the Data	53
Decide Who Should Collect the Data	54
Decide Who Should Receive the Tracking Data.....	54
Decide How to Collect the Data	55
Examples of tracking reports	59

Performance Measurement Examples 67

Introduction..... 68

What this section contains	68
Purpose of this section.....	68
What this section is not	68

Examples 69

Account Service Administrator.....	69
Administrative Assistant	71
Administrative Secretary—Legal Department	74
Art Director	77
Business Analyst—Finance	80
Can Production Supervisor	82
Compensation Director	84
Computer End-User Services Manager	87
Corporate Communication Consultant	88
Customer Service—SAC	91
Data Systems Coordinator.....	92
Designer	93
Drilling Engineer	95

Employment Supervisor	96
Engineer	97
Health Care Claims Processor	99
Human Resources Director	101
Lawyer	102
Maintenance Mechanic.....	104
Management Development Manager	106
Materials Director	109
New Account Specialist	111
Organizational Development—Senior Consultant.....	113
Policy Processing Technician	114
Principal Research Technician	117
Process Development Engineer	119
Programming Team Leader.....	121
Project Manager.....	124
Registered Nurse	126
Research and Development Director	128
Research Chemist.....	132
Sales Representative	136
Senior Research Assistant	137
Senior Vice President—Chemicals	140
Service Associate—Clinical Engineering (Biomedical)	142
Software Engineer	144
Staff Scientist	147
Systems Analyst	151
Training and Development Director.....	154
Vice President—Human Resources	156

Job Aids 159

How to Create Performance Plans	160
Performance Plan Worksheet Photocopy Master.....	164

Index 165

Information on Other ZPG Publications 175

Preface to the Second Edition

It's been more than twenty years since I created my first set of employee performance measures. And I'm still humbled by how little we know about this topic, but encouraged by how far we've come. Common sense and research data agree that employees perform better if they understand exactly what is expected of them and receive concrete feedback on their performance. While more than 90% of organizations have some kind of performance review process, very few are satisfied with the quality of the measures.

The vague and subjective evaluations that occur in many organizations, and the employee morale problems that accompany them, can be improved with a better, more objective set of performance goals. While this is simple to say, it is hard to put into practice.

This second edition represents a refinement and simplification of the techniques presented in the first edition. It includes more emphasis on linking an employee's goals to the organization's goals, as well as better steps and questions for shaping measures while they are being developed. The section on feedback systems has been simplified with new rules of thumb for sampling performance. Finally, the collection of examples has been expanded to include 32 new examples.

Again, I want to thank my clients and workshop attendees for giving me the opportunity to work with them over the last 19 years to solve their performance management problems. Without their hard work and desire for results, these ideas would have never been born nor applied.

I want to dedicate this book to my wife Sherry and my children, Michael, Arielle and Eli. They've taught me what is really important in life.

Jack Zigon
Media, Pennsylvania

June 21, 1998

How To Use This Guide

What this guide is about

Study after study has shown that clear expectations improve employee performance. But creating performance standards for hard-to-measure jobs in areas such as R&D, marketing, or customer service is easier said than done. This guide explains and shows you exactly how to develop performance measures for white-collar and other hard-to-measure work.

This guide is designed to help you learn how to create employee performance standards in the shortest amount of time. It will act as your coach and guide while providing a place for you to record ideas as you draft your objectives.

Who the guide is written for

This guide is written for:

- Managers and supervisors responsible for the results of employees reporting to them.
- Employees who want to take a more active role in developing their own performance evaluation criteria.
- Human resource personnel charged with helping individuals define their goals.
- Compensation professionals searching for metrics on which to base variable compensation.
- Anyone interested in how to measure employee performance.

While any of the above readers can use this guide, the text assumes that the reader is an employee who needs to develop job performance measures.

What this guide contains

How to Measure Employee Performance contains step-by-step instructions, worksheets, and examples to help you write a performance plan for your position. It also gives instructions for planning how to track performance data.

The first half of the guide walks you through the process. It explains and demonstrates each step, and then gives you an opportunity to practice the skill on your position. The second half is a reference containing 35 sets of example performance measures, a summary of the key steps of the process, and worksheets to help you create your performance plan.

What you will learn

After completing this guide, you will be able to:

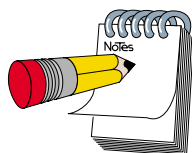
- Link your position's goals to your organization's goals.
- Identify the customers of your position and what products and services they need from you.
- Identify the value-added results of your position.
- Create measures for each result.
- Set performance standards for each measure.
- Plan how to track each measure.

How to use the guide

Your Situation	What To Do
You are helping others to develop performance measures.	• Learn the techniques before trying to help others learn them. Use the exercises and your own job as practice material for learning the skills. • Guide the employees and managers through the parts of the process which apply to their situation. Have them complete the exercises for their own job or one they know well.
You are completing this guide alone.	• Complete the exercises on your own, but seek out someone with whom to discuss the answers. This "reality check" is helpful when you get lost in the details of measuring your own work.
You are in a workshop on Performance Measurement.	• Complete the exercises as directed by your facilitator.

Learning advice

Before going further, gather any materials you have that describe the purpose of your position, performance measures for the organization, or performance measures for your job.

What to do next

1. Read this entire guide and draft a performance plan, including value-added results, weights, measures, performance standards and tracking ideas. The guide explains and demonstrates each step before asking you to try out the steps for yourself. The symbol to the left indicates that you have an exercise to complete.
2. If you are in a workshop, ask your facilitator for help with any of your work. Once you have completed your draft, meet with your supervisor to discuss and finalize your plan.

Overview of Creating Performance Plans

Introduction

This section describes the steps to draft a performance plan for your position. It breaks down the process into doable pieces and gives examples for each step. You'll be asked to record your efforts on a worksheet, which can be transferred later to your organization's performance planning form.

How to create performance plans

These are the eight steps to creating performance plans:

1. Review your organization's goals.
2. Identify the internal and external customers of your position.
3. Identify the value-added results for your position.
4. Assign a weight to each value-added result.
5. Identify measures for each value-added result.
6. Create performance standards for each measure.
7. Check the performance plan.
8. Create a tracking system.

Step 1 Review Your Organization's Goals

Introduction

Most organizations' goals focus on the next one to three years and force us to direct our attention to results that are most important to the organization. To continue to be successful as an organization, the future dictates that we focus our unique capabilities on the best ways to meet our customers' needs and to remain competitive.

Your performance plan will help you focus your personal resources on the best ways to meet your customers' needs.

Which goals to review

You should review your organization's goals as well as your manager's goals. These are goals to which your position's goals should link.

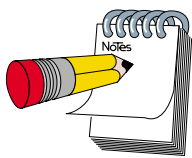
Where to get a copy of the goals

Ask your manager for a copy of your organization's goals and his/her goals. Your manager should explain the goals and specify the ones to which you directly contribute.

What to do if these goals are not yet finalized

If your organization or manager's goals are not yet finalized for the coming year, continue drafting your plan and revise it when you see a copy of the goals to which yours must link.

Application exercise



1. Review your organization and manager's goals. Record these goals and measures using the worksheet on the following page.

Note: Do not *create* any goals. Just record those measures which someone decided were important enough to track for your organization or manager.

2. Check those you can affect (✓).

How to check your work

- Does your list contain goals and measures for the entire organization and your manager?
- Have you checked those measures that you can affect?

**Organizational measures
worksheet**

Level of Measure	Measures/Goals	✓
<i>Organization</i>		
<i>Your Manager</i>		

**What to do with the
organization goals**

1. Ask your manager to explain the organization and manager's goals and your position's role in achieving them.
2. If you don't understand how you contribute to the goals, ask questions such as:
 - Who are the customers of my position?
 - What do they need from my position to do their work?
 - Which are the most important results of my position? Which are less important?

Step 2 Identify the Customers of Your Position

Why identify a position's customers?

A position exists for one reason—to meet the needs of its customers. Customers are those for whom you provide products and services that help them to do *their* jobs. Customers can be co-workers inside the organization or those on the outside who pay all of our salaries.

If your job exists to satisfy the requirements of your customers, the definition of “a good job” must take into account what these customers require from you. Customer requirements are another source of your performance standards.

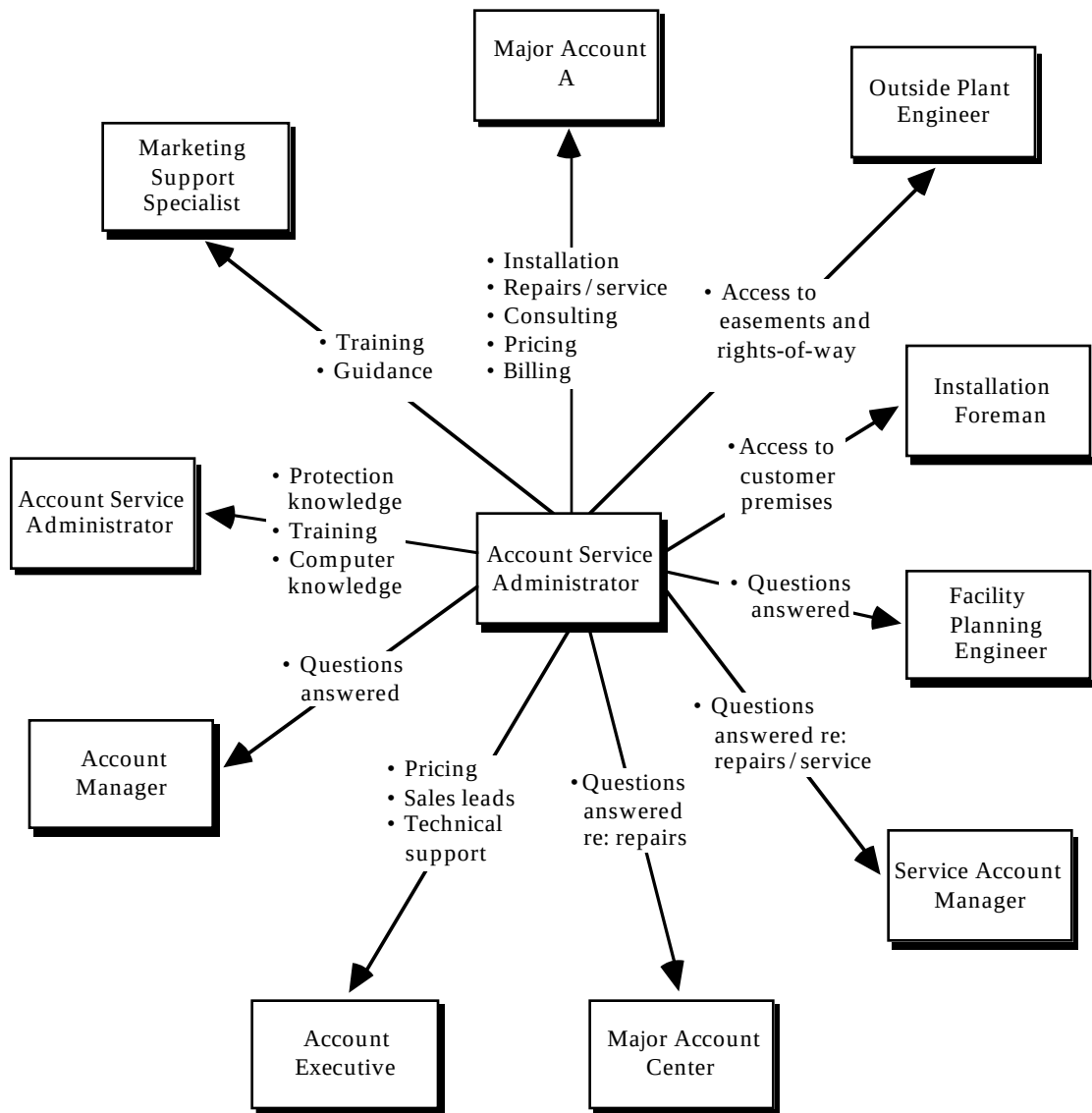
What a customer diagram does

Because “a picture is worth a thousand words,” a good way to describe your customers and what you do for them is to draw a customer diagram. The diagram shows your job, the types of internal and external customers you serve, and the products and services your customers need.

When completed, the diagram shows the links between you and your customers.

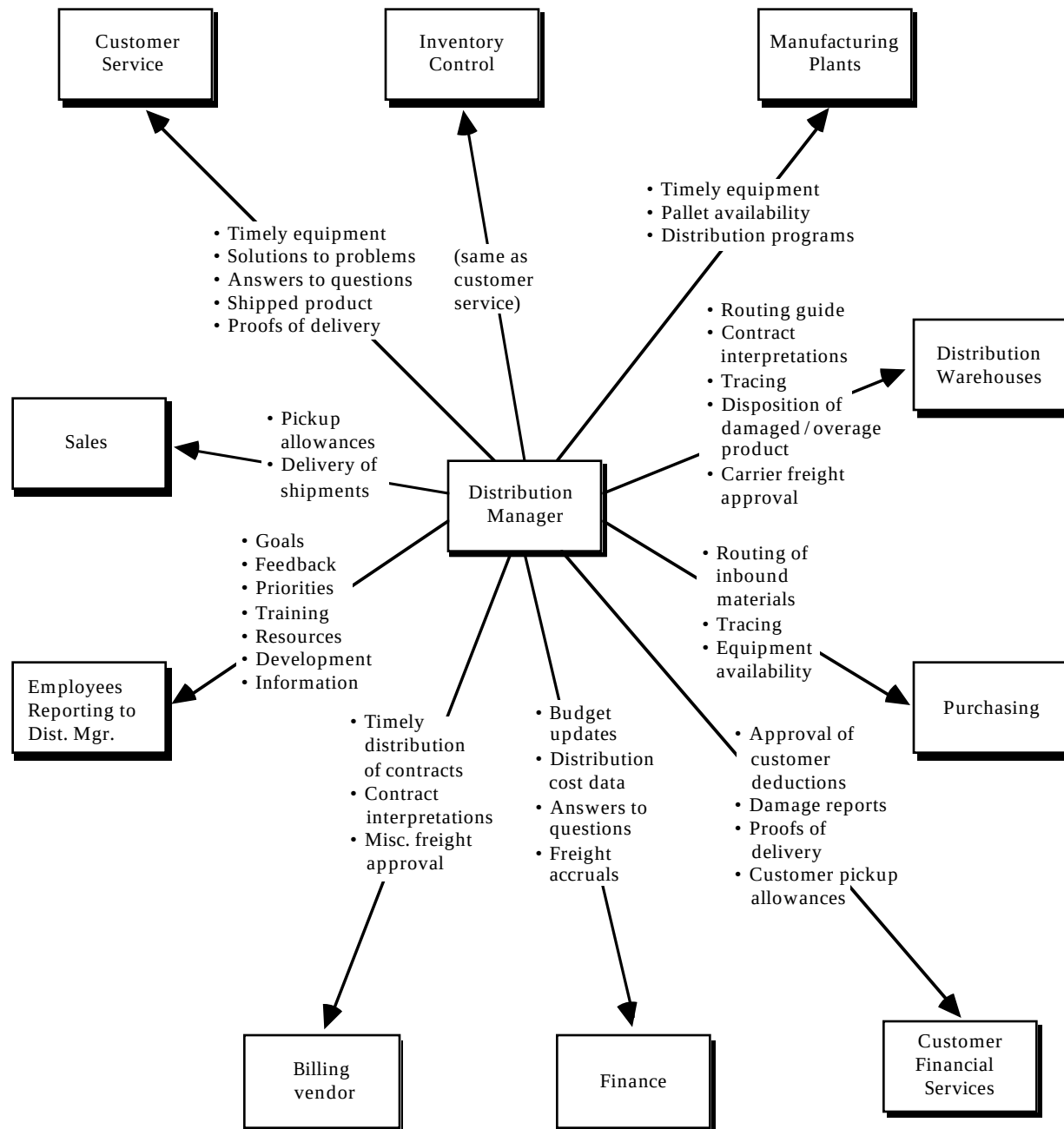
**Example customer diagram
for a Account Service
Administrator**

Here is a customer diagram for an Account Service Administrator at a telecommunications company. This position has ten customers: Marketing Support Specialist, Major Account A, Outside Plant Engineer, Installation Foreman, Facility Planning Engineer, Service Account Manager, Major Account Center, Account Executive, Account Manager, and Account Service Administrator. The items listed on the arrows are the products and services each customer needs from the Account Service Administrator.



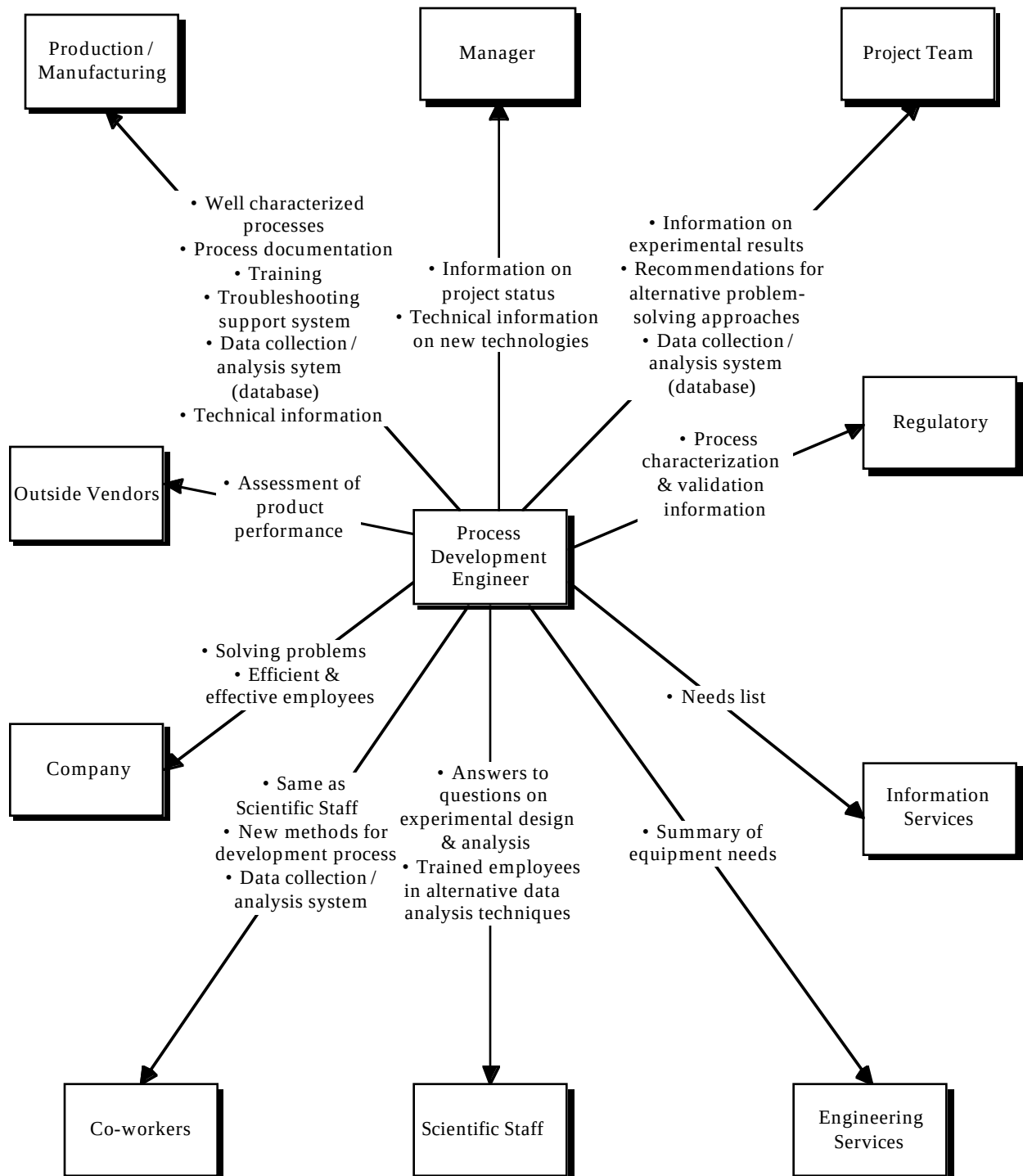
Example customer diagram for a Distribution Manager

Here is a customer diagram for a Distribution Manager. This position has ten customers: Customer Service, Inventory Control, Manufacturing Plants, Distribution Warehouses, Purchasing, Customer Financial Services, Finance, Billing vendor, Subordinates, and Sales. The items listed on the arrows are the products and services each customer needs from the Distribution Manager. Note that the subordinates of this Distribution Manager need seven products and services to do their jobs.



Another example customer diagram for Process Development Engineer

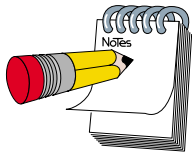
Here is a customer diagram for a Process Development Engineer. This position also has ten customers. The items listed on the arrows are the products and services each customer needs from the Process Development Engineer. Note that co-workers of this Engineer need many products and services to do their jobs.



Other examples of customer diagrams

The **Performance Measurement Examples** section of this guide contains customer diagrams for other positions. You may want to review these examples for ideas to add to your diagram. Check the Table of Contents for page numbers of diagrams that may be similar to yours.

What to do next



Now it's time to draw a customer diagram for your position. Use the space on the next page to record your work. Follow the steps below and:

1. Fill in the box in the center of the next page with your job title.
2. Draw a box for each type of customer you serve, placing the boxes around the edges of the page. Spread the boxes out along the edges of the worksheet as shown in previous examples. Leave plenty of room for the next two steps. The "Organization" box in the lower-left corner will be used in step 4 below.

Note

Just because you *interact* with someone, doesn't necessarily make this person your *customer*. A customer is someone who needs your products and services to perform a job. If you are the *recipient* in the interaction, then you are probably the customer.

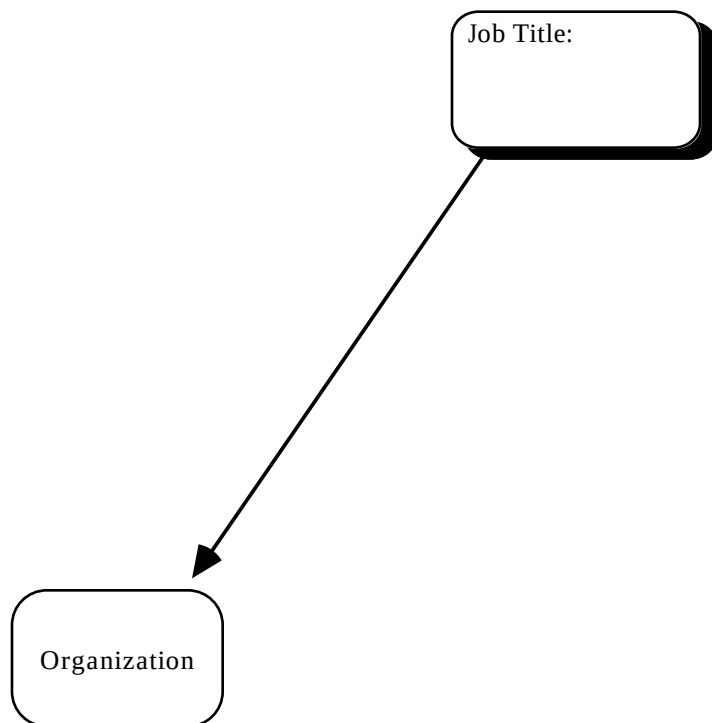
3. Draw an arrow connecting the box in the center to each customer box and list the products and services each customer needs from you.
4. When you get to the "Organization" box, answer the question, "Other than what I've already listed, what do I have to produce to support my organization's goals?"
5. Check your work against the criteria below. If you are in a workshop, ask your facilitator to review your diagram.

How to check your work

Answer the following questions about your customer diagram:

- Have I forgotten any person, function, or department that needs a product or service from my position to perform work?
- Have I forgotten anyone who *buys* products or services from my position?
- Have I identified products and services each customer needs from my position?

Your customer diagram



Step 3 List Your Position's Value-Added Results

Definitions

Activities are actions that produce results. Attending meetings, writing memos, talking to people over the phone, and solving problems are all activities.

Value-added results are the products you leave behind after you go home at night. They are your contributions that add value to the organization, and they result from your activities.

Why use value-added results as a starting point for performance measurement

The following are good reasons to use value-added results as a starting point for performance measurement:

- *It takes less time.* Agreeing on the *result* you produce takes less time than agreeing on the best *activities* to achieve the result. While there can be many ways to achieve an end, you and your manager will usually agree more quickly on the “end” and less quickly on the “means.”
- *Collecting feedback data is less costly.* Evaluating activities requires that someone be there to watch the activities happen. Evaluating the results of activities can be done by simply looking at the result.
- *It focuses on what is really important.* Measuring activity places more importance on the activity than on the results of the activity. Unless what you want is activity, focus on *results* and *adding value*.

Synonyms

Other ways to describe value-added results are:

- Outputs of the work
- Value-added contributions
- End results
- Products
- Accomplishments

Example non-value-added results

Here are examples of activities and categories that are not value-added results. You can use categories to organize groups of results, but alone, these categories do not describe employee outputs.

Non-Value-Added Activities	Non-Value-Added Categories
• Training • Marketing • Strategic planning • Cost reduction • Scheduling • Installing	• Profitability • Quality • Productivity • Safety • People • Projects • Teamwork • Service

Example value-added results

This table lists examples of value-added results for various positions. Note that, the results are *nouns* that define what these organizations are paying the individual to produce.

Position	Examples Of Value-Added Results
Numerical Analysis Researcher	• Numerical algorithms • Techniques for analyzing algorithms • Efficient and usable software • Productive collaborations • Continued / increased funding • Patents and royalty agreements
Chemical Researcher	• Basic research outcomes and innovations • Documentation • Educated organizational personnel • New technology implemented elsewhere in the organization • Process or product characterizations • Analytical results • Solutions to customer problems
Human Resources Executive	• Policies, practices, and systems to support the organization's direction • Informed public on HR issues • Functioning performance contract system • More capable executives • Qualified new-hire candidates • HR policy interpretations • Productive work teams • Labor relations interpretations and advice

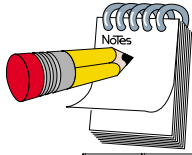
Examples of value-added results (cont'd)

Position	Examples Of Value-Added Results
Facility Engineering Manager	• Facilities that support operations • Technical guidance • Engineering documentation • Modifications documentation • Solutions to problems
Electrical Power Dispatcher	• Reliable and economic power system • Sales and purchase opportunities • Satisfied member companies • Informed departments • Improvements to computer systems and applications • Competent member company employees
Computer Systems Developer	• Reliable and functioning computer systems • Enhancements to existing computer systems • Specifications for new computer systems • Functioning new computer systems • Technical leadership • Organizational improvement ideas
Telecommunication Sales Representative	• Revenue • Profit from accounts • Satisfied customers • Functioning telecommunications systems • Sales leads • Pricing information • Answers to questions • Trained co-workers
Engineer	• Completed projects • Ideas and innovations • Strategic plans • Technical advice, guidance, and solutions to problems • Trained operations and maintenance employees
Production Supervisor	• Product for loading • Process improvements • Process and equipment changes installed and performing as designed • Production status information
Distribution Manager	• Delivered products • Budget updates • Distribution system improvements • Optimized transportation costs • Motivated and productive employees • Advice, guidance, and interpretations

Tips for writing value-added results

- Use a *noun* as the focus of the result statement. This helps to direct your attention toward the result, and away from the activity that produces the result. Notice the italicized *nouns* in each of these examples:
 - *Techniques* for analyzing algorithms
 - Organized *files*
 - *Documentation*
 - *Improvements* to computer systems and applications
 - Motivated and productive *employees*
- Use *adjectives* or *prepositional phrases* to modify the noun if they add clarity or indicate the intent of the result. Notice the italicized adjectives or prepositional phrases in each of these examples:
 - Techniques *for analyzing algorithms*
 - *Organized* files
 - Improvements *to computer systems and applications*
 - *Motivated and productive* employees
 - *Integrated* business plans
- Do not use a verb as the focus of the result statement. Verbs in the past tense describe a completed activity. Remember, the end of an activity is not necessarily a value-added result.

Use	Avoid
Functioning software	Programs <i>written</i>
Competent employees	Training classes <i>completed</i>
Organized files	Files <i>maintained</i>

Practice exercise

To make sure you understand the idea of value-added results, here is a chance to practice identifying them.

Read the list below and check those items which you feel fit the definition of a value-added result. You'll find answers on page 18.

	Item	Who does the work?	Result?
1.	Evaluating software	Programming	☐
2.	Increased profitability	Executive	☐
3.	Quality	Production	☐
4.	Finished reports	Administrative support	☐
5.	Meetings held	Accounting	☐
6.	Human resources	Information technology	☐
7.	Recommendations	Problem-solving group	☐
8.	Consulting	Employee relations	☐
9.	Productive employees	Department	☐
10.	Troubleshooting	Technical	☐
11.	Balanced workload	Team leader	☐
12.	Budget management	Advertising director	☐
13.	Outsourcing	Human resources	☐
14.	Corporate tax strategies	Taxation	☐
15.	Prospecting	Sales	☐
16.	Designing	Graphic art	☐
17.	Settled insurance claims	Claims	☐
18.	Organized files	Administrative support	☐
19.	New products	R&D	☐
20.	Giving positive feedback	Production	☐
21.	Problem solving	Clerical	☐
22.	Improvements in work processes	Production line	☐
23.	Attending meetings	Checkout clerks	☐
24.	Satisfied customers	Sales	☐
25.	Repairing electrical systems	Technical	☐
26.	Providing technical expertise	Quality improvement	☐
27.	Work assignments	Team leader	☐
28.	Manufactured products	Production line	☐

(This page intentionally left blank)

How to check your work

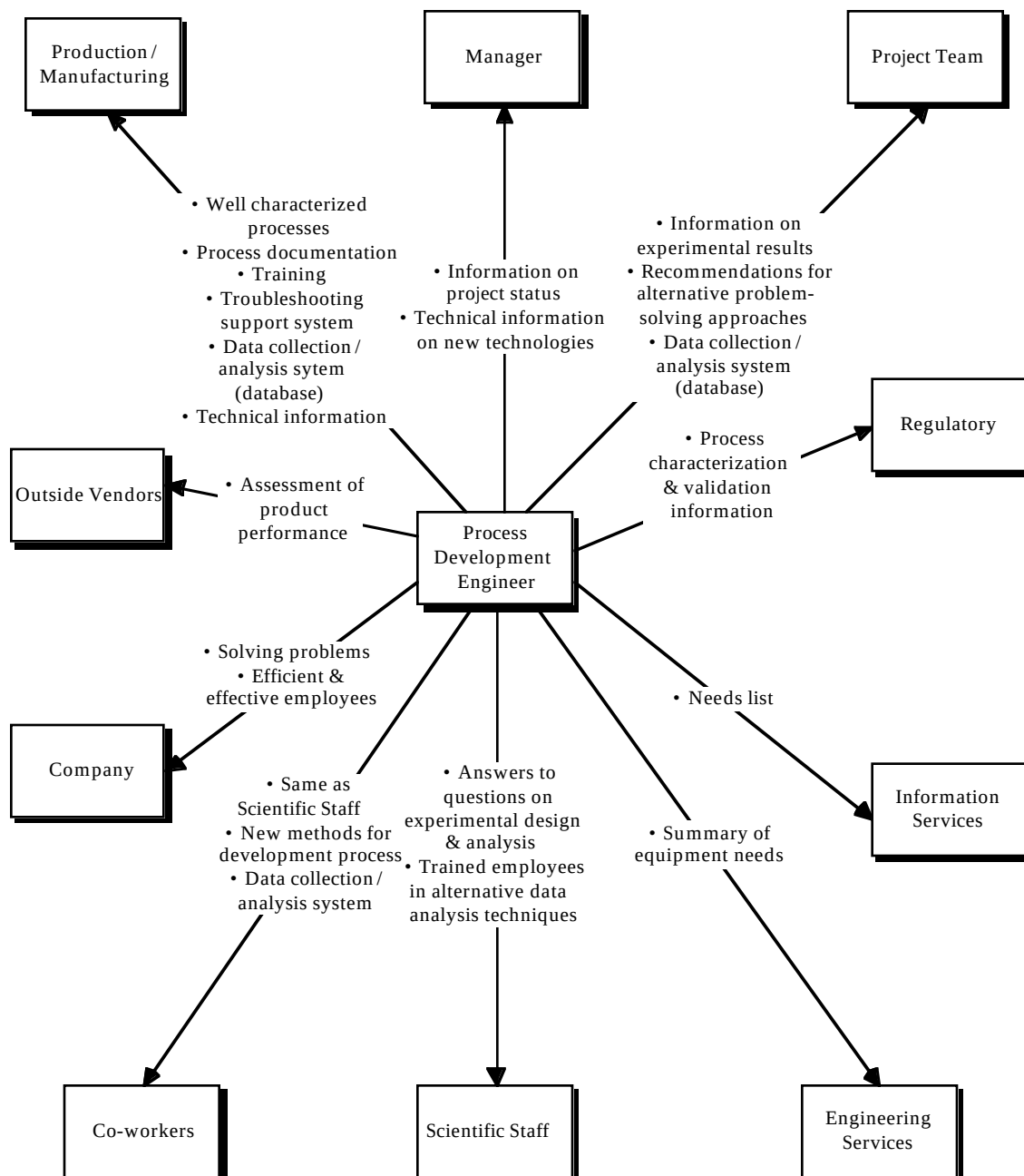
Compare your answers to those below. Verbs usually indicate activities.
Nouns usually indicate results.

	Item	Who Does The Work	Result?
1.	Evaluating software	Programmer	
2.	Increased profitability	Executive	✓
3.	Quality	Production supervisor	
4.	Finished reports	Secretary	✓
5.	Meetings held	Accounting manager	
6.	Human resources	Information technology leader	
7.	Recommendations	Problem-solving group	✓
8.	Consulting	Employee relations coordinator	
9.	Productive employees	Department manager	✓
10.	Troubleshooting	Technician	
11.	Balanced workload	Team leader	✓
12.	Budget management	Advertising Manager	
13.	Outsourcing	Human resources manager	
14.	Corporate tax strategies	Director of Taxation	✓
15.	Prospecting	Salesperson	
16.	Designing	Graphic artist	
17.	Settled insurance claims	Claims processor	✓
18.	Organized files	Secretary	✓
19.	New products	R&D scientist	✓
20.	Giving positive feedback	Supervisor	
21.	Problem solving	Clerk	
22.	Improvements in work processes	Production-line employee	✓
23.	Attending meetings	Checkout clerk	
24.	Satisfied customers	Sales person	✓
25.	Repairing electrical systems	Technician	
26.	Providing technical expertise	Quality-improvement specialist	
27.	Work assignments	Team leader	✓
28.	Manufactured products	Production-line employee	✓

Example of how to identify your results

Let's overview the steps of identifying results. First we'll identify the value-added results which come from the customer diagram. Then we'll identify results which link the position to the organization's goals. You'll complete these steps for *your* job when you get to the exercise on pages 22–23.

1. Look at the customer diagram and the products and services each customer needs. Make certain that each item listed is worth measuring. Now is also a good time to eliminate any duplicate items. For example, a Process Development Engineer delivers the following products and services to these customers.



Example of how to identify results (cont'd)

Reviewing the diagram results in the following list of 18 potential results. Six items are ~~lined out~~ because they are not worth measuring. “Data collection / analysis system (database)” appears several times on the diagram, but is listed only once here. All items are outputs, except for the three italicized services. These need to be turned into value-added results.

- Well-characterized processes
- Process documentation
- *Training*
- *Troubleshooting support system*
- Data collection / analysis system (database)
- Technical information
- Information on project status
- Technical information on new technologies
- Information on experimental results
- ~~Recommendations for alternative problem-solving approaches~~
- Process characterization and validation information
- ~~Needs list~~
- ~~Summary of equipment needs~~
- ~~Answers to questions on experimental design and analysis~~
- Trained employees in alternative data analysis techniques
- New methods for development processes
- *Solving problems*
- Efficient and effective employees

Note

To help identify the value-added result of a service (or activity), ask “What is left behind when the person goes home at night after providing this service?” If that doesn’t help, try asking “What products come from these actions?” or “What is the organization really paying the person to produce here?” The answers to your questions are the value-added result of the service.

Example of turning an activity into a value-added result:

One service listed above is “Training.” Because training is an activity, you’ll need to identify the value-added result by asking, “What is left behind after I successfully conduct training?” Depending on the situation, you might answer “classes conducted” or “knowledgeable employees.” We are looking for the value-added result; therefore the best answer would be “knowledgeable employees.” Classes don’t add value, but knowledgeable employees are a valuable addition to the organization.

Example of how to identify your results (cont'd)

2. Next identify any additional results that support the organization's business goals. Review the list of organizational goals that the position can affect, and then ask, "What value-added results do I produce that can help to reach this organization goal?"

Example

A business goal for the Process Development Engineer's organization is a 15 percent across-the-board expense reduction. Asking "What value-added results do I produce that can help to reach this goal?" results the answer "cost-saving ideas." This is added to the list of potential results.

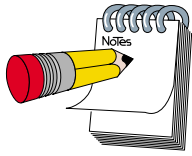
3. Make sure the entire list accounts for at least 80 percent of the job. Add any results that are missing.
4. If you have listed more than four to seven results, shorten the list by combining some into *sub-results* of larger results.

Example

The remaining items from the list are reorganized into the following six value-added results.

Items From List	Become	Value-Added Results
Well-characterized processes Process documentation	→	Well-characterized processes
Trained employees in data analysis techniques <i>Training</i>	→	Statistical data analysis techniques • Knowledgeable experimenters • Efficient process development
Process characterization and validation information Data collection / analysis system (database)	→	Databases • Project information • Process characterization information • Production information
Information on experimental results Technical information Information on project status	→	Information summaries
New methods for development processes Efficient and effective employees Technical information on new technologies	→	New methods for process development • Efficient process development group
Cost-saving ideas	→	Cost-saving ideas

What to do next



Now you'll apply these steps to your position.

1. Look at your customer diagram, and the products and services you said each customer needs from you.
 - Eliminate duplicate items and items that are not worth measuring by drawing a line through them.
 - Copy the remaining items into the first column of the worksheet on the next page.
2. Make certain each item you've listed is a value-added result, with a noun as the focus of the statement.
 - Reword the item to describe the completed value-added result using as few words as possible. Use a noun to ensure a focus on results and not on activities. Write the result in the second column of the worksheet on page 23.
 - Turn any *services* into value-added results. To help you identify the value-added result of a service, ask yourself, "What is left behind when I go home at night after providing this service?" or "What products come from these actions?" or "What does my customer walk away with at the end of the service?" or "What is the organization really paying me to produce here?" The nouns that answer these questions are the value-added results of the services. Write these results in the second column on the next page.
3. Add any results that support the organization's goals. For each goal you listed on page 5, ask yourself "What value-added results *do I produce* that can help the organization to reach this goal?" Write your answer as a value-added result in the second column on the next page.
4. Try to limit the number of results to five to nine. If you have more than nine results, shorten the list by combining some into *sub-results* of larger results.
5. When you are finished, check your work by answering the questions below:
 - Are all the results worth measuring?
 - Are all the results written as value-added results and not as activities?
 - Do I have fewer than nine results?

Directions

Use this worksheet to turn the items listed on your customer diagram into value-added results. You also use it to list those results you produce that support the organization's goals.

[illegible]

Step 4 Weight the Results

Definition

Weight is a percentage that describes the *relative* importance of a result.

Why use weights?

Weights can help you and your manager discuss priorities and agree on what is really important in the job. Because they should reflect the *importance* of the value-added result, and not just the amount of *time* spent working, weights can help you to better manage your time.

How to assign weights

To assign weights you distribute 100 percentage points across the value-added results, based upon the importance of each result to your organization and *not* the amount of time spent. Weights are usually allocated in five percent increments. If you are using smaller increments, you have too many results.

After you finish assigning weights, make sure that the numbers reflect your feeling of the relative importance of each value-added result.

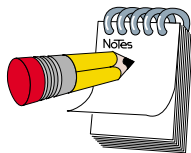
- Does the most important result have the highest weight?
- Does the least important one have the lowest weight?
- Do value-added results with the same importance have equal weights?
- Do the weights add up to 100%?

Example weights

Here are examples of weights for the Process Development Engineer and an Administrative Secretary positions.

Process Development Engineer	Administrative Secretary
Well-characterized processes (35%) Statistical data analysis techniques (20%) • Knowledgeable experimenters • Efficient process development Databases (20%) • Project information • Process-characterization information • Production information Information summaries (10%) New methods for process development (10%) • Efficient process-development group Cost-saving ideas (5%)	More productive manager (60%) • Drafted correspondence • Typed correspondence • Standard legal documents • Calendar • Travel arrangements • Organized files • Distributed mail • Phone messages Labor and environmental support (25%) • Current arbitration information log • Oriented interns • Team of internal customers who have information they need to help resolve legal issues Advertising, labeling and government affairs files (15%) • Advertising control committee files maintained

What to do next



1. Determine the weights for the value-added results you listed on page 23 to communicate your view of the job's priorities. Write the weights in parentheses next to the result as in the examples above.
2. Check the weights by answering these questions:
 - Does the most important result have the highest weight?
 - Does the least important one have the lowest weight?
 - Do value-added results with the same importance have equal weights?
 - Do the weights add up to 100%?

Step 5 Identify Measures for the Results

Introduction

Now that you have defined and prioritized the value-added results of your position, the next step is to decide what is important to measure.

Definitions

Measures are the yardsticks used to judge how well you have performed each result.

General measures tell what is important in general about each result. Use them when you have difficulty identifying measures for a particular result. There are four kinds of general measures:

- **Quantity:** How many, rate, or volume.
- **Quality:** How well, level of accuracy, completeness, or originality.
- **Cost:** How much, or cost limits within which the employee has to work.
- **Timeliness:** When, or deadline by which the result must be completed.

Specific measures describe which parts of the result to be tracked. They define how you will know whether the quantity, quality, cost, or timeliness standard has been met. There are two kinds of specific measures:

- **Numeric measures** use numbers to evaluate the result. They identify the *units* to be tracked.
- **Descriptive measures** use words to evaluate the result. They identify *who* will judge the performance and the *factors* to evaluate.

Note

Not everything can be measured with numbers! Good measures are those that can be *verified* by someone else and are observable. While you can't always use numbers, you can always use words to describe how someone could observe a performance that meets expectations.

The quickest way to create measures is to borrow them from an existing source and modify them to fit your situation. Wherever possible, you should use existing measures—either those in your organization goals, or those found in the **Performance Measurement Examples** section of this guide.

Example general and specific measures

Below are examples of specific measures for each type of general measure. The numeric measures define the numbers to be tracked. The descriptive measures define the judge and the factors to be evaluated.

General Measure	Specific Numeric Measures	Specific Descriptive Measures
Quality	• % justified complaints. • Trainees average score on final test. • \$ of scrap per period.	• End user's judgment of the software program's: • Efficiency • Usability • Bug-free • Robustness • Flexibility
Quantity	• % budget allocated to Advanced Development projects. • # of cases packaged per hour. • % of operators trained and certified.	• Manager's judgment of a full in-box of work. • Work group judgment of how much of the week's work is completed by 5:00 PM Friday.
Cost	• % budget variance. • \$ value of business process improvements. • % return on equity.	• Manager's judgment of: • Value of solution • Cost of solution
Timeliness	• # seconds of response time. • # times solutions are received in time to be useful. • % of projects completed on or ahead of in-service date.	• End user's perception of response time before and after the computer system changes were made. • By agreed-upon deadline.

How to create measures

Note: You'll perform these steps in the exercise on page 32.

1. Look at your organization's goals and manager's goals on page 5. If any of the measures listed there makes sense as a measure for one of your value-added results, use it.
2. Look at the measures in the **Performance Measurement Examples** section. If a measure in one of the examples makes sense for one of your value-added results, use it.

If you aren't satisfied with any of the existing measures, then go to step 3. If you are able to use an existing measure, skip to step 4.

3. Decide which general measures apply to each value-added result by asking, "In general, when I'm trying to evaluate this result, what do I care about: quantity, quality, cost, or timeliness?" Or ask:
 - Is quality important? Does the customer care *how well* the work is done?
 - Is quantity important? Does the customer care *how many* are produced?
 - Is it important that the result be done by a certain *time* or *date*?
 - Is it important that the result be done within certain *cost* limits?
4. For each general measure, ask yourself, "How can I measure (quantity, quality, cost, and/or timeliness)?" or "Can I track a *number* or *percent*?"

If there is no number and the result can only be *judged*, ask "Who could judge that the result is satisfactory? What factors would that person look for?"

5. Write down the specific measure. If the measure is numeric, list the units to be tracked. If the measure is descriptive, identify the judge and list the factors to be evaluated.

Example general and specific measures for Process Development Engineer

Here are examples of general measures and specific measures for part of the Process Development Engineer position. Some of the measures are descriptive and identify the judge and the factors to evaluate. Other measures are numeric and identify the numbers to be tracked.

Value-Added Results/Weights	General Measures	Specific Measures
Well-characterized processes (35%)	Quality	• QA/Purification Manager and Project Manager satisfaction with: • Limits • Process variation • Process timing • Process documentation and training
Statistical data analysis techniques (20%) • Knowledgeable experimenters • Efficient process development	Quantity Quality	• # of trained product recovery people .
Databases (20%) • Project information • Process-characterization information • Production information	Quality Timeliness	• Manager satisfaction with: • Completeness • Organization • Usefulness • Timeliness
Information summaries (10%) • Data sheets • Data summary • Memo about the data • Monthly reports • Notebooks	Quality Timeliness	• # inaccuracies per report. • # incomplete notebook entries. • # reports per month. • Manager satisfaction with: • Writing quality • Clarity • Support for conclusions • Completeness
New methods for process development (10%) • Efficient process-development group • Well-characterized processes	Quantity Quality	• # new techniques introduced to the group each year. • Manager satisfaction with the new technique's: • Effect on group results • Testing • Training • Documentation
Cost-saving ideas (5%)	Quantity Cost	• # ideas. • \$ value of ideas.

How to use the examples and index to create measures for your position

The **Performance Measurement Examples** section of this guide contains sample performance measures for 40 positions. Refer to the samples for ideas you can borrow and modify when creating measures for your position. You can also find measures by looking in the index for key words that are similar to your position's results or duties.

Other sources of measurement ideas

- Zigon Performance Group offers an additional publication titled *Performance Measurement Examples*. While the section of this guide contains hundreds of performance measures for 40 positions, the *Performance Measurement Examples* publication offers some 635 pages of performance measures for more than 300 job families developed during the last 19 years of ZPG's performance management consulting engagements. The samples are organized by job function, by industry and contain a key word index for quick retrieval. Contact ZPG for more information about this publication.
- For free examples of performance measures, you can also visit ZPG's web site at <http://www.zigonperf.com/performance.htm>

Other resources you can use and create

As you create measures for your organization's positions, publish them in paper and electronic forms and distribute them throughout your organization. ZPG clients have internally published their collections of measures and performance standards in the following formats:

- Paper documents like the appendix of this guide
- Word processing documents on diskette
- Word processing documents on a network server or mainframe
- HTML documents on an organization intranet
- Lotus Notes™ documents on a mainframe
- Mainframe and LAN databases

Addressing team measures

In some instances, a single employee doesn't have control over success for a particular result or measure, but a group of employees controls the ultimate outcome. In these situations, you can improve the group's chances for success by identifying who can influence reaching the performance standard and holding all parties accountable for the same measure.

You do this by listing the same measure on each employee's Performance Plan and labeling it a *team* or *shared* performance standard.

Example team measures

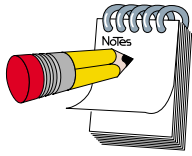
A Director of Sales shares two results, *Revenue* and *Satisfied Customers*, with the account managers. While the Director can't control all revenue and customer satisfaction results, he or she can influence the account managers who make the decisions.

Value-Added Results	General Measures	Specific Measures
Revenue	Quantity	• (Shared with assigned account managers) Dollar total billed revenue for modules assigned.
Satisfied customers	Quality	• (Shared with assigned account managers) Average score on customer satisfaction survey.

In another instance, a Human Resources Representative shares one key results, a *Diverse Work Force*, with the management team. The Human Resources Representative can't control all personnel decisions, but can influence the managers of the functional area who make the decisions.

Value-Added Results	General Measures	Specific Measures
Diverse work force • Management awareness of diversity implications of personnel decisions	Quality	(Shared by Human Resources Representative and management of functional area.) • VP of functional area satisfaction that opportunities to improve diversity were acted on: • Candidate backgrounds • Hiring decisions

What to do next



1. Use a pencil to copy the value-added results and weights listed on page 23 to the first column of the Performance Plan Worksheets on pages 33 through 38. *Copy only **two** results per page* to leave room for work you'll do later.

(A photocopy master of the Performance Plan Worksheet is included in the Job Aids section. If you are in a workshop, extra copies of the worksheet will be available from your facilitator.)

2. Look for measurement ideas in your organization or manager's goals and write them in the *Performance Standards* column if they make sense for your results.
3. Look for measurement ideas in the **Performance Measurement Examples** section and write them in the *Performance Standards* column if they make sense for your results.

If you can't find ideas that make sense for your position in either source above, then go to step 4. If you've found ideas, skip to step 5.

4. List the general measures (quantity, quality, cost, and/or timeliness) that are important for each result in the second column of the Performance Plan Worksheet.
5. List specific measures for each general measure in the third column of the Performance Plan Worksheet. If the measure is numeric, list the units you will track. If the measure is descriptive, identify the judge and factors to be evaluated.
6. If you are in a workshop, ask your facilitator to review your list of measures.

Performance Plan Worksheet

Name _____ Page _____ of _____

Dept. / Position _____

[illegible]

Dept. / Position

1

Page ____ of ____

[illegible]

Name _____ Page _____ of _____

[illegible]

Dept. / Position

Page ____ of ____

[illegible]

Performance Plan Worksheet

Name _____ Page _____ of _____

Dept. / Position _____

[illegible]

Dept. / Position

1

Page ____ of ____

[illegible]

Step 6 Create Performance Standards for Each Measure

Introduction

The next step in developing a performance plan is setting the level of performance you expect for each measure you have identified.

Definition

If a **measure** is the yardstick used to judge an employee's performance, then a **performance standard** is the range of points on the yardstick representing *good* performance. The measure is *what* you evaluate and the performance standard is *how much* you require.

How to create performance standards

After you define the measure, creating the performance standard is easy. Use the following steps,

For numeric measures

1. Ask, "How many am I expected to produce?" or "What level of performance must I achieve to help my organization achieve its goals?"
2. Write the performance standard as a *range*, where the top of the range represents *exceeds* performance, and the bottom of the range is the point where management would say this is a problem worth discussing.

For descriptive measures

1. Ask, "For each factor, what would the judge *see* that shows you have done a job that *meets expectations*?" Or "What would this judge *hear* your customers *say* that indicates you have done a job that *meets expectations*?"
2. List the judge, the factors, and what constitutes a *meets expectations* job for each factor.
3. Repeat the process to define what *exceeds performance* would look or sound like.

Criteria for setting performance standards

A standard should:

- *Be verifiable.* If you can't verify that it has been met, it will not be a useful guide for performance.
- *Be achievable.* If the standard is impossible to meet, the employee will become discouraged and give up.
- *Be practical to track and monitor.* If the cost to collect the data exceeds the value of the information, you'll eventually stop using the measure.
- *Define both meeting and exceeding expectations, where possible.* Having both levels defined lets you better differentiate between performers and gives motivated employees a target to shoot for.
- *Require perfection only when no errors can be tolerated.* If perfection is the goal, there is no way to exceed it, and therefore no way to differentiate employees based on performance.
- *If met, have an impact on achieving the organization's goals.* Link the employee goal to the organization goal.
- *Use a range for numeric measures.* This removes ambiguity when deciding if a standard has been exceeded or when a problem needs to be addressed.
- *Assign a judge and verifiable descriptions that define when the standard has been met.* Without both components, the descriptive standard will not be verifiable.

Example performance standards for Process Development Engineer

Here are examples of performance standards for a Process Development Engineer position.

Value-Added Results/Weights	General Measures	Specific Measures	Performance Standards
Well-characterized processes (35%)	Quality	- QA / Purification Manager and Project Manager satisfaction with: - Limits - Process variation - Process timing - Process documentation and training	- QA / Purification Manager and Project Manager are satisfied that: - The spec. limits are set outside the process limits. - The process has been varied within spec. windows and has been shown to not affect final product quality. - The process has been characterized so that “plateaus” and “cliffs” have been identified. - The process characterization is completed ≤ 1 month before the beginning of phase 3 production. - The documentation and training have been completed at least 1 month before the beginning of phase 3 production. - Exceeds = Process capability ≥ 1.0 and completed more than 1 month prior to phase 3 production.
Statistical data analysis techniques (20%) - Knowledgeable experimenters - Efficient process development	Quantity Quality	# of trained product-recovery employees	6 to 9 product-recovery employees are trained to the point that they can independently use the techniques on at least one experiment.
Databases (20%) - Project information - Process-characterization information - Production information	Quality Timeliness	- Manager satisfaction with: - Completeness - Organization - Usefulness - Timeliness	- Manager is satisfied that: - All available data is entered. - Data is organized and is easily accessible. - Data entered in the spreadsheet is useful for process analysis. - Database is available for data entry before data is available.

Value-Added Results/Weights	General Measures	Specific Measures	Performance Standards
New methods for process development (20%) • Efficient process development group • Well-characterized processes	Quantity Quality	• # new techniques introduced to the group each year. • Manager satisfaction with the new technique's: • Effect on group results. • Testing. • Training. • Documentation.	• One new technique is introduced to the group each year. • The manager is satisfied that the new technique: • Allows the group to be more efficient, more cost-effective and /or more accurate. • Has been adequately tested and characterized so that the implications of introduction are understood. • Is introduced with adequate explanation and training so that other group members can use it effectively. • Is well documented so that it remains useful after the introduction.
Cost-saving ideas (5%)	Quantity Cost	• # ideas. • \$ value of ideas.	• Engineer identifies at least one idea per year for reducing company-wide costs. • Exceeds = Ideas are championed to implementation; the idea causes significant cost savings or improvements in operations.

Example performance standards for Administrative Secretary

Here is a partial set of performance standards for an Administrative Secretary position.

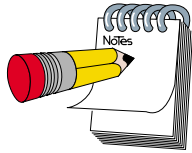
Value-Added Results	General Measures	Specific Measures	Performance Standards
More productive manager	Quality Timeliness	• Manager satisfaction with: • Personal productivity. • Preparation. • Schedule balance. • Availability to other departments.	• Manager is satisfied that, as a result of the Administrative Secretary's efforts, manager: • Is able to handle matters in a timely and efficient manner. • Is able to find information without a lot of searching. • Has complete and accurate information. • Has a schedule that balances between meeting and non-meeting work. • Can be located at all times. • Is scheduled for customer meetings soon enough to handle the problem. • Doesn't need to handle matters that the Administrative Secretary can handle independently
• Drafted correspondence	Quality Timeliness	• Manager satisfaction with completeness and timeliness of drafts.	• Manager says that correspondence is ready to be signed without any changes. • Correspondence is ready for review in time to meet deadlines.
• Typed correspondence • Standard legal documents	Quality Timeliness	• Manager satisfaction with accuracy and timeliness of documents.	• Counsel and recipients of correspondence say: • Documents contain correct punctuation and no typos. • The format is appropriate. • Correspondence is completed in time to meet deadlines.

Value-Added Results	General Measures	Specific Measures	Performance Standards
• Calendar	Quality	• Manager satisfaction with: • Availability • Completeness • Accuracy of schedule	• Manager is satisfied that: • Others in department can reach manager when manager is out of town. • The flight schedule is on calendar. • All scheduled meetings are on the calendar and canceled meetings are removed. • No duplicate meetings exist. • He/she is informed when meetings are added to the schedule.
• Travel arrangements	Quality	• Manager satisfaction with: • Type of flights • Alternatives • Completeness • Cost effectiveness	• Manager is satisfied that: • A minimum number of commuter flights are used. • A variety of ways are offered to get to the location and fit the schedule. • Arrangements include hotel, car and flight information and the correct city and state. • A free ticket is used when available.
• Organized files	Quality	• # times filed materials can't be found. • Self-sufficiency of department personnel.	• No more than 5 to 6 times/year filed materials can't be found in time to be useful. • When necessary, department personnel can find materials when the Administrative Secretary is not there.
• Distributed mail	Quality	• Manager satisfaction with: • Priorities • Completeness • Who handles routine matters	• Manager says: • Correspondence is prioritized. • Background material is attached. • Routine matters are handled by the Administrative Secretary.

Other examples of performance standards

The **Performance Measurement Examples** section of this guide contains performance standards for additional positions. Review them for ideas you can use in your performance plan. You can locate ideas for specific results and measures by using the key word index at the end of the guide.

What to do next



In the fourth column of the Performance Plan Worksheets you used earlier, list your performance standards for each Specific Measure. When you are finished, check your work using the checklist and troubleshooting table on pages 46 and 47.

Step 7 Check the Performance Plan

What a good performance plan looks like

After you've prepared the performance plan, check it against the following criteria.

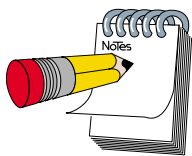
Does the list of value-added results:

- Describe valuable end products and not activities or categories?
- Have a noun as the focus of the statement, and not a verb?
- Specify critical value-added results needed by the position's customers?
- Account for 80 percent or more of the position's responsibilities?
- Have weights that describe the relative importance of each result?

Does each performance standard:

- Allow verification that the performance standard has been met?
Can it be seen or can knowledgeable persons agree that the performance standard has been met?
- Appear to be achievable?
- Appear practical to track and monitor?
- Use a range when the measure is numeric?
- Have a judge, list of factors, and "meeting" and "exceeding" expectations for each factor when the measure is descriptive?
- Define both "meets expectations" and where possible, "exceeds" and require perfection only when no errors can be tolerated?
- If achieved, have an impact on achieving the organization's goals?

What to do next



Now it's time to check the performance plan:

1. Use the checklist above to verify that the performance plan is technically correct.
2. Use the Common Problems And Solutions table on the next page to further troubleshoot and improve your performance plan.
3. If you are completing this guide in a workshop, ask your facilitator to review the first four columns of your performance plan.

Common problems and solutions

The following table lists typical performance planning problems along with examples and suggested solutions.

Common Problem	Examples	Solution
Wrong value-added results.	No result of “satisfied customers” for a position that provides a service to specific customers.	- Add the missing results. - Remove results that don’t match the purpose of the position.
Activities disguised as results.	- Meetings attended. - Evaluations scheduled.. - Reports written	- Identify the value added contribution made to the organization as a result of the activity and make that contribution the result. “Meetings attended” becomes “New product decisions” or “Solved problems.”
Too many results.	List of 15–20 results	Combine results by making some into <i>sub-results</i> of other larger results.
Measures not verifiable, or descriptive performance standards lack a judge or verifiable checklist.	- Evaluate work in a quality fashion. - Demonstrate positive interface with other departments. - Meaningful agenda specific to needs.	- Decide who will make the judgment. - Identify what factors the judge will look for. - List what the judge will see or hear to indicate that the performance meets expectations.
Specific measures don’t match the general measures.	General measures list “quantity,” “quality,” and “timeliness” as important, but specific measure is “number of meetings held with customers.”	Create specific measures for each general measure.
Measures would take too long to track.	- Number of typos. - Answering the phone by the third ring.	- Track a sample of the work when tracking all of it is too time-consuming. - Instead of tracking the “percent correct,” track the “number of errors.” - Drop the measure.
Numeric performance standards lack a range.	98% of customers say they are satisfied. - Three errors per quarter.	The manager or customer may have in mind a range of performance that “meets expectations.” If so, make it explicit.
Performance standard defined in such a way that it can’t be exceeded.	- Performance standard contains words such as zero, never, always, less than, more than, all. - Performance standard uses a range with zero or 100 percent as one of the ends of the range.	- If perfection is absolutely necessary, keep the performance standard the way it is. - If perfection is not likely to be attained, set the performance standard so that perfection represents “exceeds” performance, not just “meets expectations.”
Performance standard written as if performance happens only once per year, when the performance occurs many times per year.	- Report has no errors. - Progress reviews are held on a timely basis. - Applications approved within three days of receipt.	If result occurs more than once, then state either the number or the percent of results that must meet the performance standard. Examples: % reports with no errors, no more than 1–2 progress reviews are late per year, 95–99% of applications approved within three days.

Step 8 Create a Tracking System

Introduction

Now that you've developed a list of value-added results and performance standards, it's time to think about how you'll track that data.

Definitions

Feedback is information you use to guide your performance in the correct direction.

A **tracking system** is made up of the documents and procedures you use to collect and summarize the data for feedback purposes.

Types of feedback and their effects

To provide the most useful guidance, feedback needs to tell employees what they are doing right *and* what they are doing wrong. Providing only one of these can have the following effects:

- **Negative feedback only**—When employees hear only what they are doing wrong, they eventually stop trying to satisfy their customers and the organization. They become disgusted and may even feel like leaving the organization.
- **Positive feedback only**—When employees hear only what they are doing right, they feel better about their work, but because they don't hear of their errors, they assume everything is OK and continue to make the same mistakes.

What good tracking systems look like

Effective tracking systems are:

Relevant—Employee receives information directly related to his/her performance standards.

Frequent—Generally, the more frequent the feedback the better. The goal is to provide feedback often enough to prevent employees from drifting off target.

Immediate—Feedback should come as soon as possible after the work is completed.

Specific—Feedback should state exactly how employees did compared with their performance standards.

Why tracking systems are important

Unless employees know how they are doing, they can't improve. Honest, two-way communication between employees, their customers and management begins with accurate data about how well the employees are performing. Without it, both the employee and manager can exchange only subjective opinions about how the employee has performed.

How tracking systems can help employees

As an employee you receive the following benefits:

- With good feedback, you will be able to improve your performance *before* your manager hears that there is a problem.
 - Your manager will have more opportunities to recognize you for good work because the evidence of a job well-done will be more obvious.
 - You and your manager will be able to act on performance problems sooner and take corrective action before the problems become overwhelming.
 - Your interim review meetings and annual evaluations will be less stressful because you already know how you are performing.
-

How tracking systems can help managers

As manager you receive the following benefits:

- You'll have fewer performance problems to deal with because employees solved them before they became large enough to come to your attention.
- You'll have more opportunities to recognize employees for good work because the evidence of a job well-done will be more obvious.
- Your job will be easier because your employees will manage themselves more often.
- Employee interim review meetings and annual evaluations you conduct will be less stressful because your employees will already know how they are performing.

Planning How to Track Performance Data

Introduction

Now that we've discussed the basics of a good tracking system, you can begin planning how to collect the necessary data.

Data collection decisions

Here are five decisions you need to make before creating the tracking reports:

- What data to collect
 - When to collect the data
 - Who should collect the data
 - Who should receive the data
 - How to collect the data
-

Note

Don't be surprised if you find yourself changing the value-added results and standards on your performance plan as you work through planning how to track the data. This happens frequently!

Creating a tracking system ensures that the employee is collecting the right information and that the information is worth more than the effort required to collect it.

Decide What Data to Collect

Rules

- The data should be relevant to the standard.

Example: If you have a standard for the percentage of reports completed by a deadline, you would need to collect the following data:

- Total number of reports,
- Number of reports completed
- Date each report is completed

but you would not need this data:

- Number of complaints due to late reports
 - Number of incorrect reports
-

Rules (cont'd)

- The data should be specific enough to let you know what was right or wrong compared with the standard.

Example: Assuming you provide a service to an internal customer, your manager might sit in on a customer meeting and provide feedback on how helpful you are to the customer (for instance, reaching agreement on a problem, understanding why it is happening, and offering several solutions to the customer). Or you might periodically survey a sample of customers regarding your helpfulness to them on the same factors.

Feedback such as "You need to do a better job helping people" doesn't tell you what was right or wrong compared with the descriptive standard of "reaching agreement on a problem, understanding why it is happening, and offering several solutions to the customer."

Four sources of feedback

- **The job itself**—A human resources manager conducts seminars. Using exercises during the class, the employee can determine whether the participants understand the material the HR manager has presented.
- **The employee**—A researcher knows that his portion of a project budget must be met. He can provide feedback to himself by comparing the money spent with the budgeted amount for his steps.
- **The manager**—A customer service rep is supposed to solve problems independently. Because problems vary greatly in complexity and potential damage if left unresolved, the manager is the sole judge of how well the employee handles each problem. The manager looks for two things: that the rep tries to solve problems independently before coming to the manager for help, and that the rep comes to the manager before wasting too much time with no progress.
- **Other people who receive the work**—The employee can check with a customer to see whether the marketing promotion the employee produced is working as promised.

The best source

The best source of feedback is the job itself. The feedback is immediate and objective. If the employee can't receive feedback from the job itself, then try to create the resources and tools to allow employees to check their own work.

Having employees collect their own tracking data also saves work for the manager. Collecting data on 10 employees every week can consume a lot of management time that would be better spent elsewhere.

Feedback from others is less desirable because the information is typically delayed, non-specific, infrequent, and often takes the form of a complaint. However feedback from others is better than no feedback at all.

How much data to collect

You can collect all or some part of the performance data. The following table describes when to do each option.

Method	Advantages	Use For:
Collect all the data	Ensures total accuracy. Shows the total picture. Makes it easier to spot trends.	• Very critical measures that must be tracked each time the work is done (e.g., deadlines on major project milestones). • Work performed infrequently (e.g., service rating data from mystery shoppers).
Sample the work	Reduces the amount of time spent collecting the data.	• Duties performed so often that collecting all the data is impractical (e.g., processing benefit claims or taking phone messages). • More data than would be worth collecting.

Rule

If you decide to sample the work, make the sample size large enough to be seen as fair by the employee, but small enough to be doable.

While this rule does not follow the guidelines for a statistically valid sample size, it does take into account the practical realities of tracking data in the real world.

If the rules for a statistically valid sample size are followed, the sample will typically be larger than most people are willing to collect, violating the rule “the value of the data collected should be greater than the cost to collect it.”

Decide When to Collect the Data

Rule	Whenever possible, collect the data immediately after completing the work.
Why to collect the data immediately	• Less time is spent collecting the information. • Immediate feedback increases the chance that employees will correct their own performance. • Employees tend to pay more attention to immediate feedback. Delayed feedback is like “yesterday’s news” and is more easily ignored. • Employees are more likely to remember <i>how</i> they did the work; thus, the causes and solutions of problems are easier to find.
Exceptions to immediate collection	Sometimes it is not only a good idea, but also necessary to delay the feedback. • Data cannot be gathered quickly. Example: Checking the accuracy of an employee’s computer input for a database would take almost as much time as entering the original data. Having everyone “downstream” look for errors as they do their work is more efficient. • Data cannot be gathered without disrupting work. Example: Checking the accuracy of new procedures immediately after they are written would take users away from their work. Waiting until users are free to try out the new procedure does not interrupt the work flow. • Results are not known immediately. Example: Checking compliance with safety procedures is done with periodic audits. The number of infractions can’t be determined until the audit results are in.

Decide Who Should Collect the Data

Rule	Although a number of people could collect the data, the best person is the employee who does the work.
-------------	--

Why it is important for the employee to collect the data	• The manager will be sure that the employee actually received the tracking data (because the employee <i>collected</i> the data). • The employee knows that the data is accurate. • It ensures immediate feedback. • It saves time for the manager.
---	--

Exceptions	Someone other than the employee should collect the data in these three instances: • When gathering the data disrupts the work flow and takes too much time. • When the completed work is seen only by someone other than the employee. • When the measure requires the judgment of someone besides the employee.
-------------------	--

Example exception	The number of justified complaints about some aspect of the employee's work requires that the manager decide whether a given complaint is <i>justified</i> or not.
--------------------------	--

Decide Who Should Receive the Tracking Data

Rule	The employee should always receive a copy of the feedback. Others on the distribution list may include: • The manager • Other departments affected by the employee's performance
-------------	--

Decide How to Collect the Data

Methods of recording collected data

There are three ways to record collected data:

- Use existing reports and forms.
- Modify existing reports and forms.
- Create new reports and forms.

When to use existing systems

Existing reports should be the first place you look for possible tracking reports. If you're already collecting the data, don't duplicate that effort. Generally, all the information you need exists in some form, but it may not be going to the right people or may arrive too late to be useful.

As a manager, you may be aware of reports that your employees know nothing about. You can help them create tracking systems by providing them with copies of existing reports that might offer useful information.

Use an existing report when:

- The report specifically provides data relating to the standard. If the information is too general, it is difficult to determine how well you performed.
- The report relevant data can be highlighted. Do not use a report that is too cluttered with useless data.
- The report is created frequently enough to be of value.

When to modify existing reports

Modifying an existing report is your second choice when designing a tracking report. By adding a column or a calculation you may be able to turn an existing report into a useful tracking report. You still need to ensure that it is relevant, specific, frequent, and immediate.

Example tracking decisions

Here's an example set of tracking decisions for two value-added results of the Account Service Administrator position. The two results being measured are "satisfied customers" and "functioning telecommunications system."

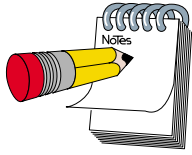
Value-Added Results	Satisfied customers	Functioning telecommunications system
Measures	Customer satisfaction.	% installations done right the first time.
What data to collect	Customer feedback on problem handling, initiative, availability.	Total # installations, # installations needing additional work.
How much of the data	Feedback from all customers .	Data on all installations requiring additional work.
When to collect the data	A constant stream of data is better than a great quantity of data at one time, so they assess customer satisfaction periodically. Surveying 1/12 of customers each month allows data to be collected from all customers, but spreads the feedback over the entire year.	Right after the installation is completed.
Who collects the data	Employee mails the survey to a portion of the customer base each month.	The employee.
Who receives the data	The employee.	The employee.
How to track the data	New customer satisfaction survey .	Existing work order log .

**Example completed
performance plan worksheet**

The following table shows how the tracking decisions (in **bold** on page 56) for the first two measures were recorded in the “How to Track” column of the performance plan worksheet for the Account Service Administrator (ASA). Remaining entries in the “How to Track” column were created by making the same decisions for each performance standard. Note that the general measures and specific measures columns have been deleted to save space.

Value-Added Results	Performance Standards	How to Track
Satisfied customers (35%)	- Customers say they are satisfied that: - Problems are handled faster than they expected. - The most important aspects of their concerns are handled. - Customer needs are anticipated. - ASA is always available when needed. - Customer demands and needs are always met.	Create customer survey to go to 1/12 of customers each month; sent and summarized by ASA.
Functioning telecommunications system (25%) - Installation - Major repairs and servicing - Solutions to problems	90% to 95% of installations are right the first time. 90% to 95% are responded to within 2 to 4 hours. - No more than 2 to 3 jobs per quarter require overtime. - Customer orders the service as recommended. - Exceeds = ASA provides an unasked-for solution, which the customer agrees to order.	Work order log. - Voice mail message clearing report. - Comparison of proposal and actual order by ASA. - Overtime report.
Sales leads (15%)	2 to 6 sales leads per quarter. 2 to 3 leads per quarter that convert to orders.	- Lead report. - Sales manager Email.
Pricing (10%)	- No more than 2 to 4 customer disputes per year. - No more than 2 to 4 quotes per quarter that are not responded to within one business day.	Billing exception report.
Answered questions (10%)	Requesters say that ASA advice was right and the information was received in time to be useful.	ASA asks requester for feedback.
Trained co-workers (5%)	Co-workers and their managers say the co-workers know how to do the task.	Skill or task checklist.

What to do next



It's time to complete the fifth and final column on the Performance Plan Worksheets you started earlier (pages 33–38). The information you record in the “How to Track” column should address the following:

- What data to collect
- How much to collect (including sample size if not collecting all the data)
- When to collect the data
- Who will collect the data
- Who will receive the data
- Name of report (if one exists)

Examples of tracking reports

Introduction

The tracking process helps you think through what data you'll need to collect. Let's look at report formats and tools you'll use to collect tracking data.

Example 1

The Training Summary below is a tracking table used to collect data on employee training.

Note: You can use the same idea to record cross-training by listing employee names down the side *and* across the top. As each employee becomes competent in another employee's job, enter a date in the appropriate cell.

Training Summary

Name _____ Dates covered _____

Directions: Fill in the names of the operators in the left column. Enter the names of the tasks to be learned across the top row. Enter the date that employees master each task in the appropriate cell.

Employees	Department Tasks						
	Enter	Code	Update	Mail	Program	Revise intranet	Revise manual
Juanita Booth	1/5/96			3/14/96			
Dannette Bonnell							
Hugh Boyd							
Terry Druhan							
Frank Guy							

Example 2

You can use the Employee Satisfaction Survey below to collect data on the effectiveness of a manager.

Employee Satisfaction Survey

Answer the following questions about how well your supervisor manages your performance. Color in the circle of the appropriate answer:

How much do you agree with each of the following statements?	Very Much Agree	Somewhat Agree	Somewhat Disagree	Very Much Disagree	Don't Know Or Doesn't Apply
1. I understand the organization's direction, my department's goals, and my role in reaching these goals.	①	②	③	④	NA
2. I understand specifically what my manager expects of me.	①	②	③	④	NA
3. I understand how well I am doing compared with these expectations.	①	②	③	④	NA
4. I understand what I have to do to improve my performance.	①	②	③	④	NA
5. My performance appraisal accurately reflects my performance.	①	②	③	④	NA
6. I have the supplies and resources to do my work, or I understand why I don't have them.	①	②	③	④	NA
7. I have the skills and knowledge I need to do my job, or I have a plan to help me obtain them.	①	②	③	④	NA
8. My manager tells me when I do a good job.	①	②	③	④	NA
9. The size of my pay increase is related to my performance.	①	②	③	④	NA

Example 3

Below is a sample Product Manager Tracking Report. This report is used to track and summarize performance data for a product manager.

The report was created by adding an “Actual Performance” column to the performance plan. Sample descriptions of actual performance are included.

Product Manager Tracking Report

Name Jane Doe Dates covered Jan. 19XX to December 19XX

Value-Added Results	Performance Standards	Actual Performance
Profitable sales (20%)	• \$24M to \$35M annual dollar sales. • 15% to 21% profit before taxes. • $\pm$ 5% expense budget variance.	• \$26M in sales. • 18.1% profit. • 1% over budget.
New product designs (5%)	• Corporate VP Marketing’s satisfaction that the new product designs: • Maintain the corporate feel. • Contain at least 3 products that are different than anything the competition is selling. • Enhance and maintain the corporate image through high quality art, text and materials. • Focus groups say the following about the new product designs: • The value of the product exceeds the price. • I would be proud to purchase this for my father. • They prefer our designs to the competition’s designs in a blind preference test. • Are different than they have ever seen. • Have something that they think their father would enjoy. • Have at least two cards that express the exact feeling they want to communicate to their father. • Gifts look like they will last as long as the gift will be meaningful. • 30 to 50 ideas generated that are different than those suggested during the last three years.	• Corporate VP says that: • All but two of the new product designs maintain the corporate feel. • Five of the products are different than anything the competition is selling. • All but two products enhance and maintain the corporate image. • Four out of five of the focus groups said that the value exceeded the price. • Three out of five said that they would be proud to purchase the gifts for their fathers. • Five out of five said they preferred our designs to the competition’s. • Two out of five said the gifts are different than they have ever seen. • Five out of five said that the line has some gift their fathers would enjoy. • Five out of five said that the card line has at least two cards that expressed the feeling they wanted to express. • Four out of five said that the gifts look like they will last. • 57 ideas for new products were generated.

Value-Added Results	Performance Standards	Actual Performance
Shipped products (10%)	• 90% to 95% complete orders. • 96% to 98% orders shipped within 48 hours. • Reduction in cycle time for entire design / production process from 16 months to 11 months.	• 94.5% complete orders. • 98% orders shipped within 48 hours. • Cycle time was reduced to 11.5 months.
Signed retail outlets (5%)	• 150 to 250 new outlets signed. • \$5M to \$8M in sales from new outlets.	• 212 outlets were signed. • \$9.5M in sales.
Satisfied consumers (10%)	• Less than .5% returns due to defective products. • Less than \$100K in gift returns to retailers. • 90% to 95% of surveyed retailers say they are satisfied that: • The product line contains products at the price points and product types their customers want. • The price of the products seems to match the quality of the products.	• .1% returns due to defective products. • \$75K in gift returns. • 96.2% of retailers were satisfied with the product types and value of the products.

Example 4

The next two pages include examples of a Collection Report and a Summary Graph used in the computer room. The gray bands running across the graph from 90 to 95 and from 98 to 99 show the performance standards for the data being plotted.

Lead Computer Operator Collection Report

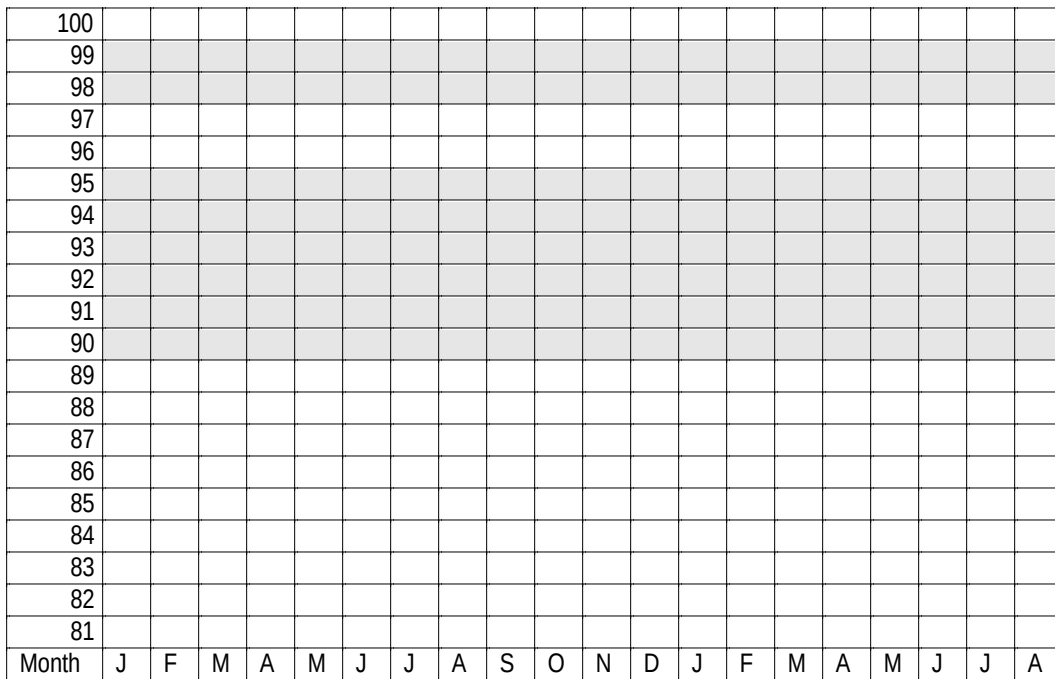
Directions: At the end of each day, enter the appropriate data in each column. At the end of the month, calculate the percentage that meet standards.

Day	Total jobs run	# that meet specs	Group name daily quota	Actual names run daily	Indiv. box daily quota	Actual boxes run
1	123	121	317,000	313450	1353	1346
2	125	125	322,000	318394	1375	1368
3	126	120	325,000	321360	1386	1379
4	158	152	407,000	402442	1738	1729
5	145	145	374,000	369811	1595	1587
6						
7						
8	156	155	402,000	397498	1716	1708
9	115	114	296,000	292685	1265	1259
10	148	146	382,000	377722	1628	1620
11	136	135	351,000	347069	1496	1489
12	59	59	152,000	150298	649	646
...	...	...	...	...	...	...
18	158	154	407,000	402442	1738	1729
19	132	131	340,000	336192	1452	1445
20						
21						
22	136	135	351,000	347069	1496	1489
23	125	124	322,000	318394	1375	1368
24	129	126	333,000	329270	1419	1412
25	100	99	258,000	255110	1100	1095
26	178	170	459,000	453859	1958	1948
27						
28	133	130	343,000	339158	1463	1456
29	145	144	374,000	369811	1595	1587
30	126	125	325,000	321360	1386	1379
31	111	111	286,000	282797	1221	1215
Total	3190	3146	8224000	8131891	35090	34918
% met		98.62%		98.88%		99.51%
Standard		98-99%		90-95%		90-95%

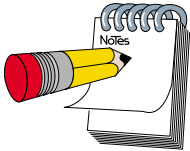
Lead Computer Operator Summary Graph

Name _____ Dates covered _____

Directions: Plot the percentage of jobs that meet specs, and the percentage of both quotas achieved.



What to do next



Design tracking reports for each of your performance standards. You should also create reports for collecting and summarizing the data where appropriate. Spend your time designing the reports but avoid drawing them with time-consuming neatness—you will probably modify them after you discuss them with your manager anyway!

After you have completed the designs, check them using the How to Check Your Work questions and Common Problems and Solutions table on page 65.

How to check your work

To check your work, ask yourself the following questions:

Does the tracking plan:

- Address every measure on the performance plan?
- Have employees collecting the data wherever possible?
- Direct employees to collect data relevant to the performance standards?
- Direct employees to collect data as soon after the performance as possible?
- Look like the value of the data collected will be greater than the effort involved in collecting it?

Do the tracking reports :

- Use existing reports rather than create new ones?
- Use the fewest-possible pieces of paper?
- Allow the employees to compare the actual performance with the standard without looking back at the performance plan?
- Have room for comments to describe special circumstances?
- Appear practical to complete and use?

Common problems and solutions

The troubleshooting table below lists typical tracking planning problems along with their solutions.

Problem	Examples	Solution
Measures would take too much time to track.	• Number of typos. • Answering the phone by the third ring. • No time to maintain the graphs required.	• <i>Sample</i> the work when tracking all of it is too time consuming. • Instead of tracking the “percent correct,” track the “number of errors.” Use exception reporting. • Change the measure to something that is already being collected. • Use spreadsheet software to store and plot the data on a graph. • Drop the measure because it costs more to collect the data than it is worth.
Creating many new reports.	• Duplicating a report that already exists. • Lots of customer surveys.	• Look for more existing reports to modify. • Use a single department customer survey and change the performance standard to a team measure.
Wrong results or standards.	• No result of “Customers satisfied” for a position that provides a certain service to specific customers.	• Add missing results. • Fix the performance standards.

(This page intentionally left blank)

PERFORMANCE MEASUREMENT EXAMPLES

Introduction

What this section contains

This section contains:

- *Performance Measurement Examples* — A collection of customer diagrams and performance plans for 40 positions which you can use as a source of ideas when creating your own performance plan.
- *Job Aids* — A summary of the key steps along with worksheets to help you create your performance plan.

Purpose of this section

During your training, this guide will give you *ideas* that will help you develop your performance plan. You should borrow the ideas and modify them for use in your plan.

After training, the job aids will act as a quick reference guide to the how-to steps of developing performance standards.

What this section is *not*

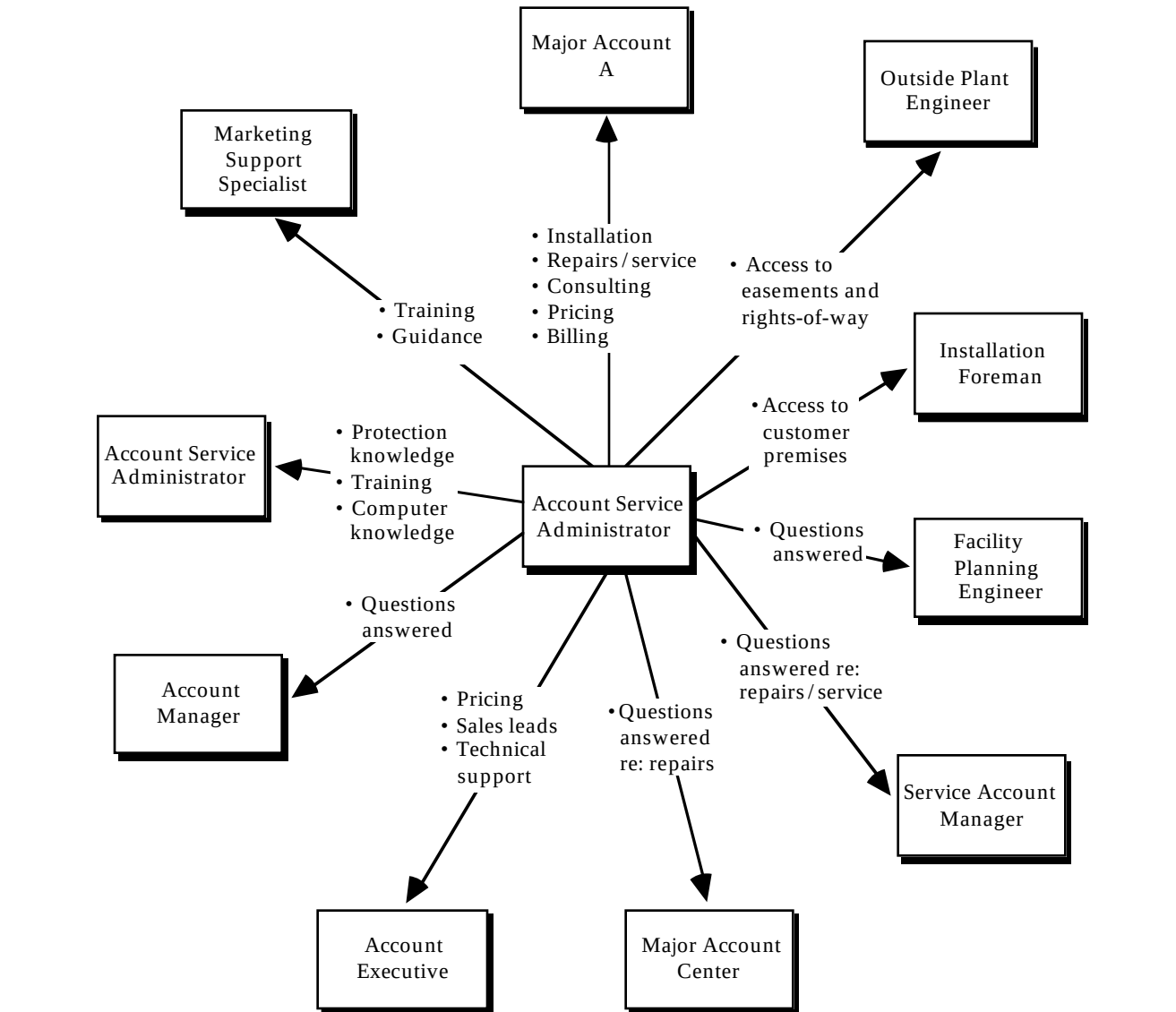
This is *not* a collection of *standard* performance plans that must be used for any particular position.

Note

If your job title isn't here, look for a job that does the same kinds of work you do. You can then modify the results and performance standards according to your specific situation.

Another option is to look in the key word index for terms that describe the results of your work or your job responsibilities. You can then select value-added results and performance standards from a number of positions and modify them to fit your situation.

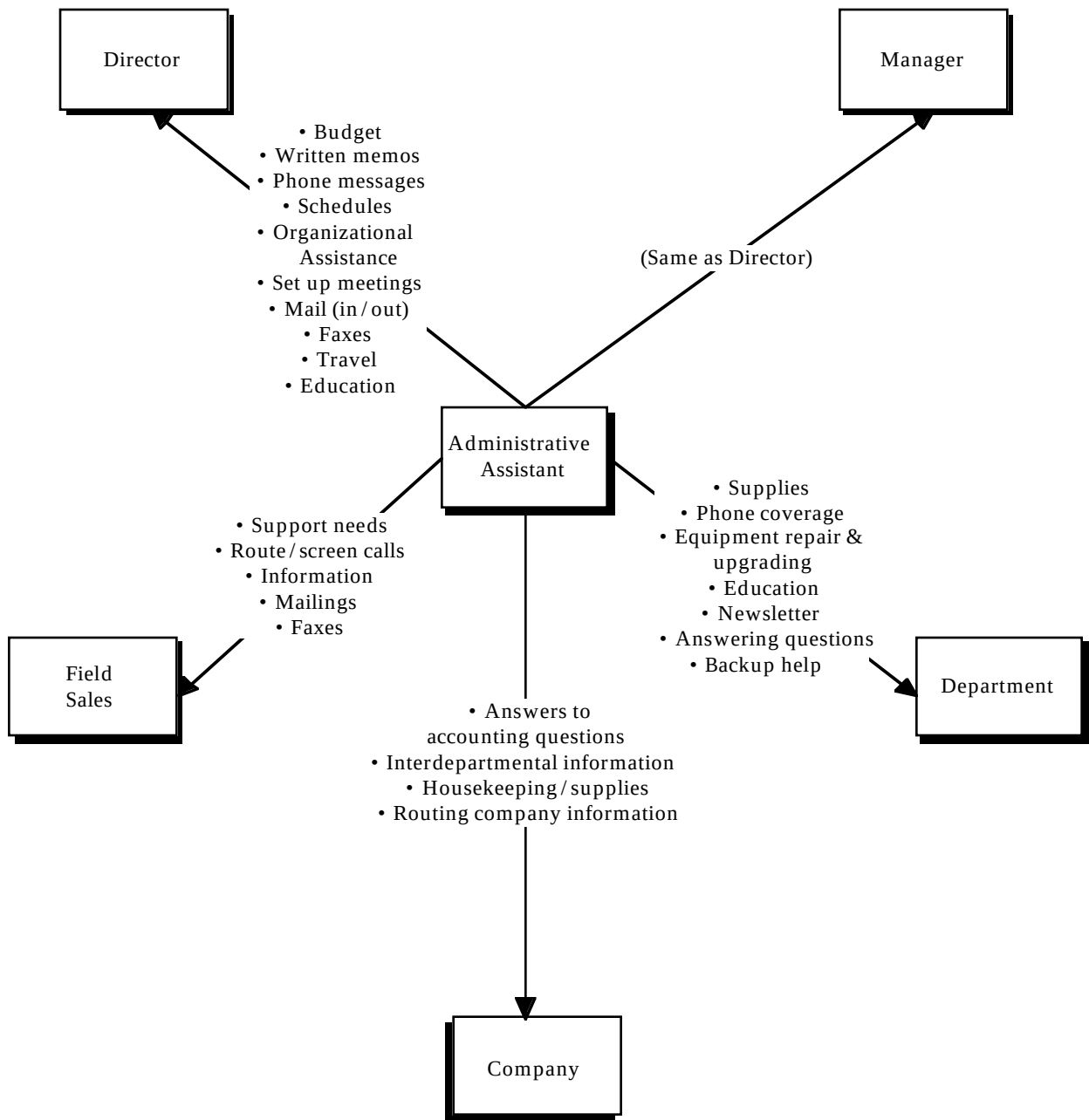
Account Service Administrator



Account Service Administrator

Value-Added Results/Weights	Performance Standards
Satisfied customers (35%)	• Customers say they are satisfied that: • Problems are handled faster than they expect. • The most important aspects of their concerns are handled. • Their needs are anticipated. • Account Service Administrator (ASA) is always available when needed. • Their demands and needs are always met.
Functioning telecommunications system (25%) • Installation • Major repairs and servicing • Recommendations and solutions to problems	• 90%–95% of installations are right the first time. • 90%–95% of service requests are responded to within 2–4 hours. • No more than 2–3 jobs / quarter which require overtime. • Customer orders the service as recommended. • Exceeds = ASA provides an unasked for solution, which the customer agrees to order.
Sales leads (15%)	• 2–6 sales leads / quarter. • 2–3 leads / quarter that convert to orders.
Pricing (10%)	• No more than 2–4 customer disputes / year. • No more than 2–4 quotes / quarter not responded to within 1 business day.
Answered questions (10%)	• Requesters say that what ASA advised was right, and the information was received in time to be useful.
Trained co-workers (5%)	• Co-workers and their boss(es) say the co-workers know how to do the task.

Administrative Assistant

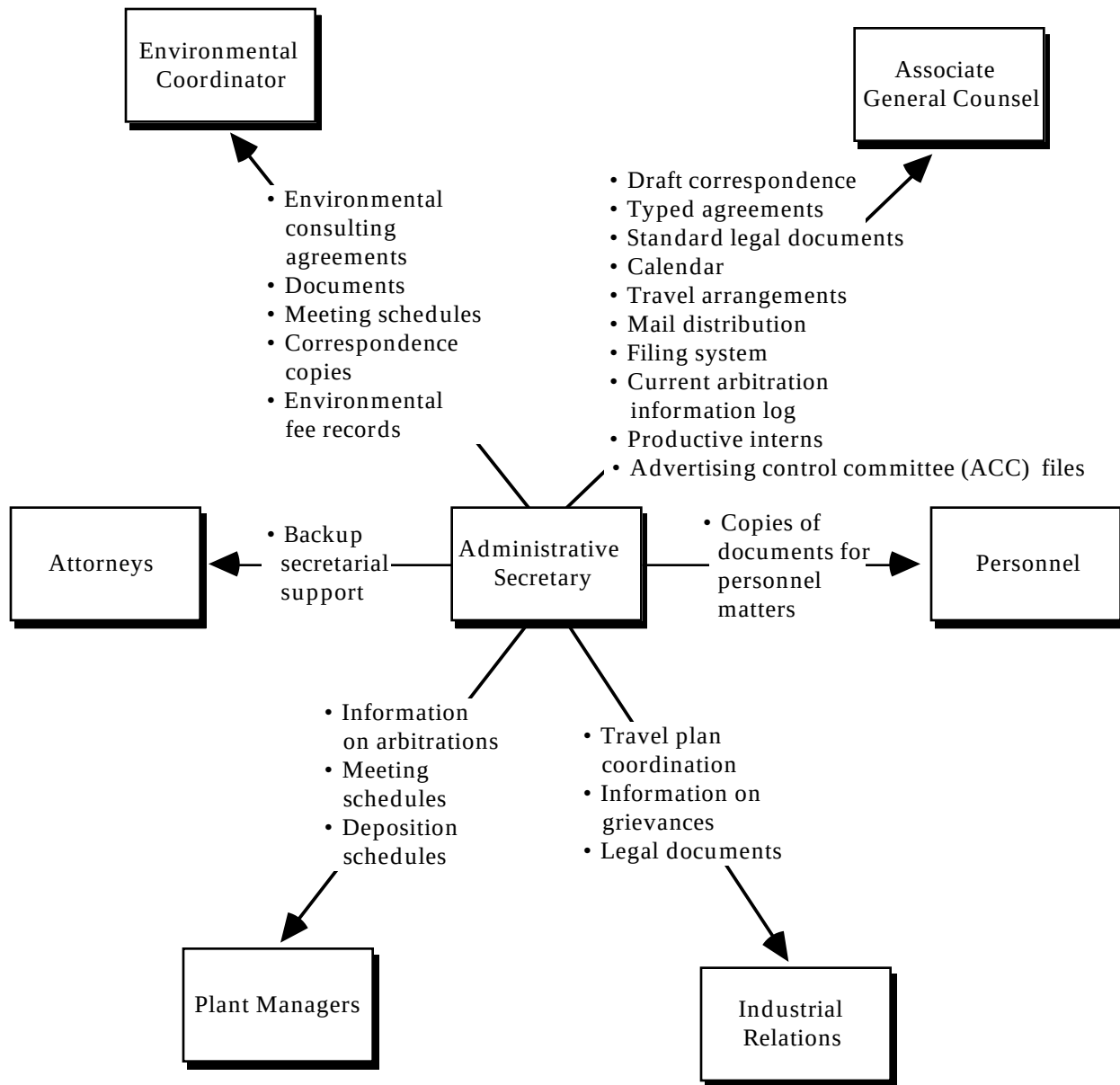


Administrative Assistant

Value-Added Results/Weights	Performance Standards
More productive Director (50%)	- Director is satisfied that Administrative Assistant (AA) performs the following: - Completes tasks independently. - tasks without intervention. - Takes over tasks that the Director doesn't have to do personally. - Alerts the Director to potential problems in communications and scheduling. - Suggests alternative communication methods. - Prioritizes work to always do the most important tasks first.
Department financial status (15%) - Actual spending vs. budget - Problems - Appropriate charges	- Line item actual expenditures are reconciled with the budget year-to-date. - Outliers are highlighted. - Quarterly budget status report is error-free and columns total correctly across and down. - Complete and accurate budget data comes from 4 departments at least 3 business days before the budget review date. - The yearly budget is completed by the deadline and accurately incorporates successive rounds of changes. - Exceeds = AA coordinates entire budget process without supervision 2 weeks before department review meetings.
Effective communication (15%) - Phone messages - Answers to questions - Routed calls - Mail in / out - Faxes - Newsletter - Education arrangements	- No more than 1–2 complaints / quarter due to: - Inaccurate or incomplete phone messages. - Incorrect answers to questions. - Misrouted phone calls. - Mail sent by wrong method. - Faxes not received. - Inaccurate information in the newsletter. - Department members unable to attend a seminar due to lack of receipt.
Smooth day-to-day department operations (5%) - Repaired and upgraded equipment - Moved equipment - Department supplies	- AA anticipates needs of department to ensure that: - Equipment, furniture and voice mail are set up prior to a new employee's arrival. - Supplies arrive prior to running out. - Exceeds = Builds improvements in hardware / software into next year's budget and reminds the Director to carry out the budget in a timely fashion.

Value-Added Results/Weights	Performance Standards
Up-to-date schedule (10%) • Meeting set-ups • Travel arrangements	• Supervisor is satisfied that: • The schedule is balanced to leave open time each day. • The AA suggests meeting changes. • The AA cancels meetings when critical people can't attend. • No meetings are missed because the meeting isn't on the calendar. • The calendar is up-to-date. • Meeting info is received ahead of time. • The AA is able to schedule all senior managers at a meeting on a timely basis. • Exceeds = The AA is able to correctly change the schedule to match shifting without having to ask the Director.
Completed special projects (5%)	To be determined when project is assigned.

Administrative Secretary—Legal Department

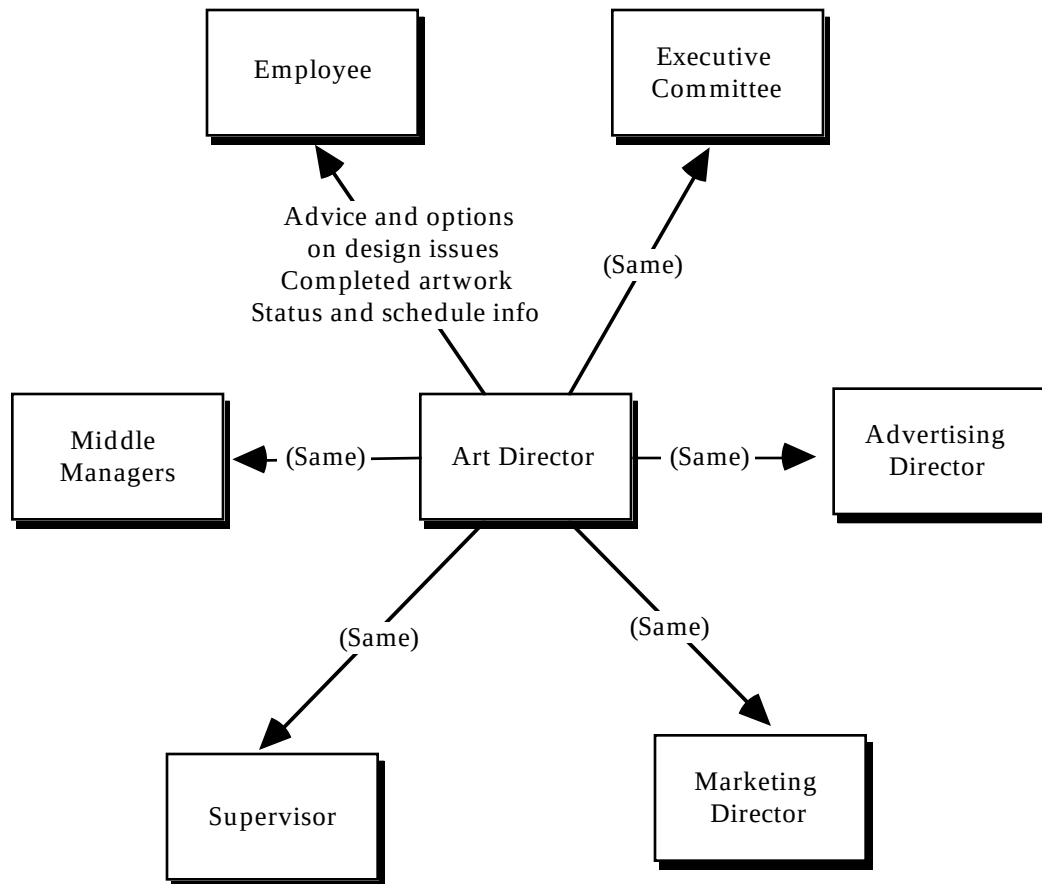


Administrative Secretary—Legal Department

Value-Added Results /Weights	Performance Standards
More productive lawyer (60%) - Drafted correspondence - Typed correspondence - Standard legal documents - Calendar - Travel arrangements - Organized files	- Associate General Counsel is satisfied that, as a result of the administrative secretary's efforts, he/she can: - Handle matters in a timely and efficient manner. - Find the information needed without a lot of searching. - Have information that is complete and accurate. - Have a schedule that balanced between meeting and non-meeting work. - Be located at all times. - Is scheduled for customer meetings early enough to handle the problem. - Doesn't have to handle matters the Administrative Secretary could handle independently. - Associate General Counsel says that correspondence is ready to be signed without any changes. - Correspondence is ready for review in time to meet the deadline. - Counsel and recipient of the correspondence say: - The document contains correct punctuation and no typos. - The format is appropriate. - Correspondence is completed in time to meet the deadline. - Assistant General Counsel is satisfied that: - Others in department can reach him/her when out of town. - The flight schedule is on calendar. - All scheduled meetings are on the calendar and canceled meetings are removed. - No duplicate meetings exist. - He/she is informed when meetings are added to the schedule. - Executive is satisfied that: - A minimum number of commuter flights are used. - A variety of ways are provided that will reach the location and fit the schedule. - Arrangements include hotel, car and flight information and the right city and state. - A free ticket is used when available. - No more than 5–6 times/year filed materials can't be found in time to be useful. - Department personnel can find materials when the Administrative Secretary is away.

Value-Added Results /Weights	Performance Standards
• Distributed mail • Phone messages	• Assistant General Counsel says: • Correspondence is prioritized. • Background material is attached. • Routine matters are handled by the Administrative Secretary. • Assistant General Counsel says: • He/she is interrupted for important/urgent calls only. • Routine calls are handled by the Administrative Secretary who informs his/her of the outcome. • He/she is given enough information about the incoming phone call to prepare to return the call. • Backup secretaries interrupt appropriately on urgent calls.
Labor and Environmental (25%) • Current arbitration information log • Oriented interns • Team of internal customers who have information they need to help resolve legal issues	• Department attorneys say: • Log contains complete, accurate and up-to-date information about the case. • Internal customers have copies of the log as needed. • Associate General Counsel and the Office Supervisor say: • Cover letter and resume are available before the scheduled interview. • Interns have a working knowledge of company policies and have signed all necessary documents prior to starting work. • Interns are able to produce their own correspondence. • Interns know what resources exist and how to make use of them. • Associate General Counsel and internal customers say that the right people have all the information pertaining to the particular case prior any decision points.
Advertising, labeling and government affairs (15%) • Advertising control committee (ACC) files maintained	• No more than 10–12 times/year filed materials can't be found in time to be useful. • Department and outside personnel can find materials when the Administrative Secretary is away.

Art Director

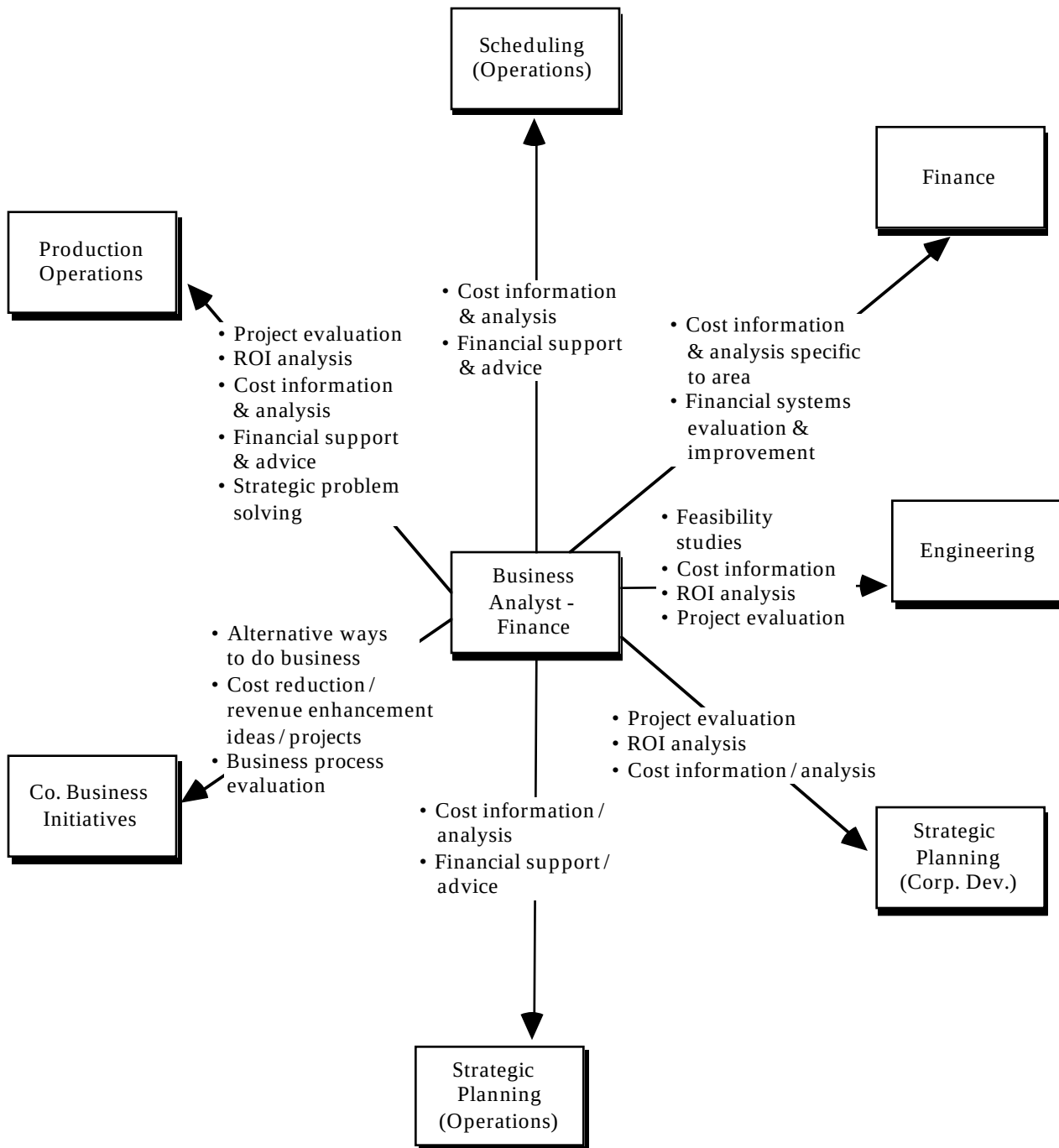


Art Director

Value-Added Results/Weights	Performance Standards
Design services (50%) National and international advertising	- All publication deadlines are met. - Vendor costs are within budget. - Budgeted hours are within $\pm 10\%$. - Supervisor is satisfied with the following: - Style is contemporary and not dated. - Use of type is appropriate. - Quality of photo or art is high. - Overall quality is comparable to competitors' ads. - Message is clear to the reader and uses a creative approach. - Ad uses graphic standards consistent with the corporate identity standards manual. - Exceeds = Design is unique and breaks new ground, is award-winning or is copied by competitors. - Client is satisfied with the following: - Image conveyed to the public is the image upper management wants to convey. - Message is clear (copy and graphic support each other). - Important "buzzwords" appear in the copy. - Details in the ad are up-to-date and truthful. - Corporate identity is in the ad.
Graphic arts vendors results (30%)	- Quality of the product meets client's and supervisor's expectations. - Exceeds = Getting vendors really excited about the project and willing to do portfolio-quality work for less money than they usually charge. - Agreed-upon budget is met. - Agreed-upon deadline is met.
Advice and options on design issues (10%)	- Supervisor is satisfied with Art Director's advice (based on observation of meetings between client and Art Director) - Client agrees that Art Director understands what is wanted. - Client accepts Art Director's design suggestions. - The design suggestions will lead to a good design (as judged by the supervisor). - The design suggestions show creative initiative (unique design ideas are initiated by the Art Director, agreed to by the client and stay within the budget). - Exceeds = Client says they got more than they expected, and the design exceeded their expectations.

Value-Added Results/Weights	Performance Standards
- Created sales promotional materials, direct mail, sales folders, packaging, brochures and fliers - Logo designs	- All agreed-upon deadlines are met. - Vendor costs are within budget. - Agreed upon budgeted hours are within $\pm 10\%$. - Supervisor is satisfied with the following: - Style is contemporary and not dated. - Use of type is appropriate. - Quality of photo or art is high. - Overall quality is comparable to competitors' materials. - Message is clear to the reader and uses a creative approach. - Materials use graphic standards consistent with the corporate identity standards manual. - Exceeds = Design is unique and breaks new ground, is award-winning, is copied by competitors, or results in good measured response on direct-mail piece. - Client is satisfied that the: - Image conveyed to the public is the image marketing management wants to convey. - Message is clear (copy and graphic support each other). - Important "buzzwords" appear in the copy. - Details in the materials are up-to-date and truthful. - Corporate identity is in the materials. - All agreed-upon deadlines are met. - Supervisor is satisfied that the logo: - Reproduces well in various sizes and in 3 dimensions. - Can be used as one color, line art and half-tone versions. - Conveys the function of the product. - Has a strong identity and reads well. - Uses type in a unique manner. - Has high quality art. - Exceeds = award winning design, people say they are excited about using it, has a 10 year longevity, gets public recognition without the text. - Client is satisfied with the following: - Image conveyed to the public is the image the client wants to convey. - Message is clear. - Logo is easily recognizable. - Typeface matches the personality of product / program. - Vendor costs are within budget. - Agreed upon budgeted hours are within $\pm 10\%$.
Client and supervisor informed of project status (10%) - Budget - Schedules	- Client and Supervisor understand the status of all projects - All details of the jobs are addressed. - There are no surprises for either the client or supervisor.

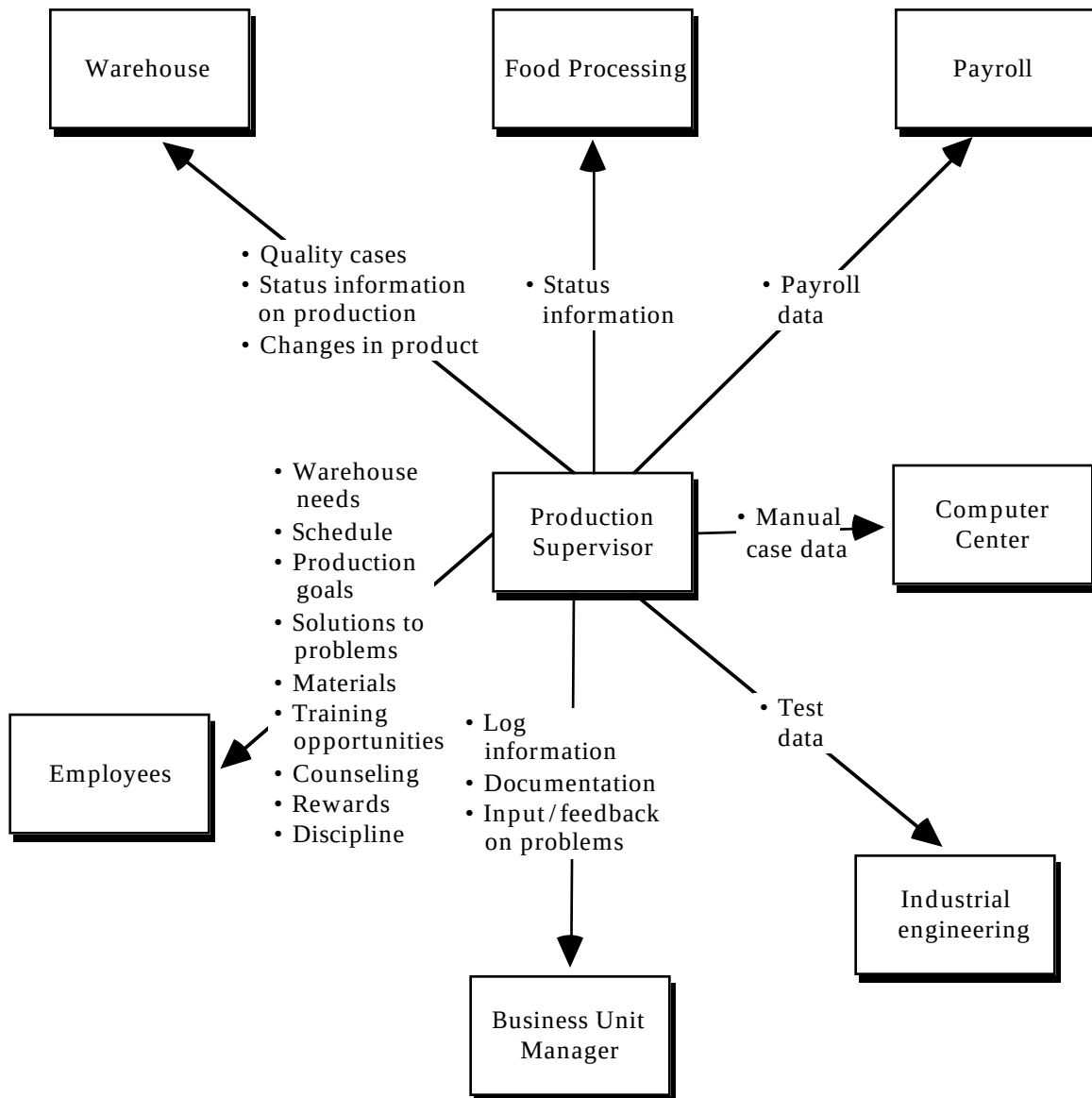
Business Analyst—Finance



Business Analyst—Finance

Value-Added Results/Weights	Performance Standards
Information supporting business decisions (35%) • ROI analysis • Cost information / analysis	• Operations, Engineering, Planning and Finance say that: • All cost impacts surrounding the decision have been identified and evaluated. • The numbers are accurate and do not require second-guessing or rework. • Reports / analyses logically state the issues and reach conclusions that are supported by the data and analyses. • The analysis is useful and answers the question asked. • The analysis / information was provided by the agreed-upon deadline.
Reductions in cost and revenue enhancements (35%) • Alternative ways of doing business • Cost saving / revenue enhancement ideas and projects • Business process evaluation and analysis	• Customers say that: • The idea or project fits the strategic direction of the department / company. • The evaluation of the idea / project addresses all issues and cost impacts. • Reports / analyses logically state the issues and reach conclusions that are supported by the data and analyses. • Initiates at least 1 idea / year that results in cost savings, efficiency improvement or flexibility improvement. • Exceeds = Several ideas, or large dollar impact, or makes a dramatic change in efficiency or flexibility.
Financial advice/solutions to strategic problems (15%) • Cost knowledge / analysis • Performance capabilities • Team participation	• Customers say that: • All cost impacts surrounding the decision have been identified and evaluated. • Reports / analyses logically state the issues and reach conclusions that are supported by the data and analyses. • They can use the information. • The Analyst made meaningful contributions without dominating.
Improved financial systems (15%) • Designs • Development • Implementation	• Manager and customers in Finance and Operations are satisfied that: • The system change is within the scope of control. • The change provides information in a more efficient, accurate and useful manner than previously. • The time required to implement the change meets the customer's needs and deadlines. • The value of the improvements exceeds the cost of the implementation.

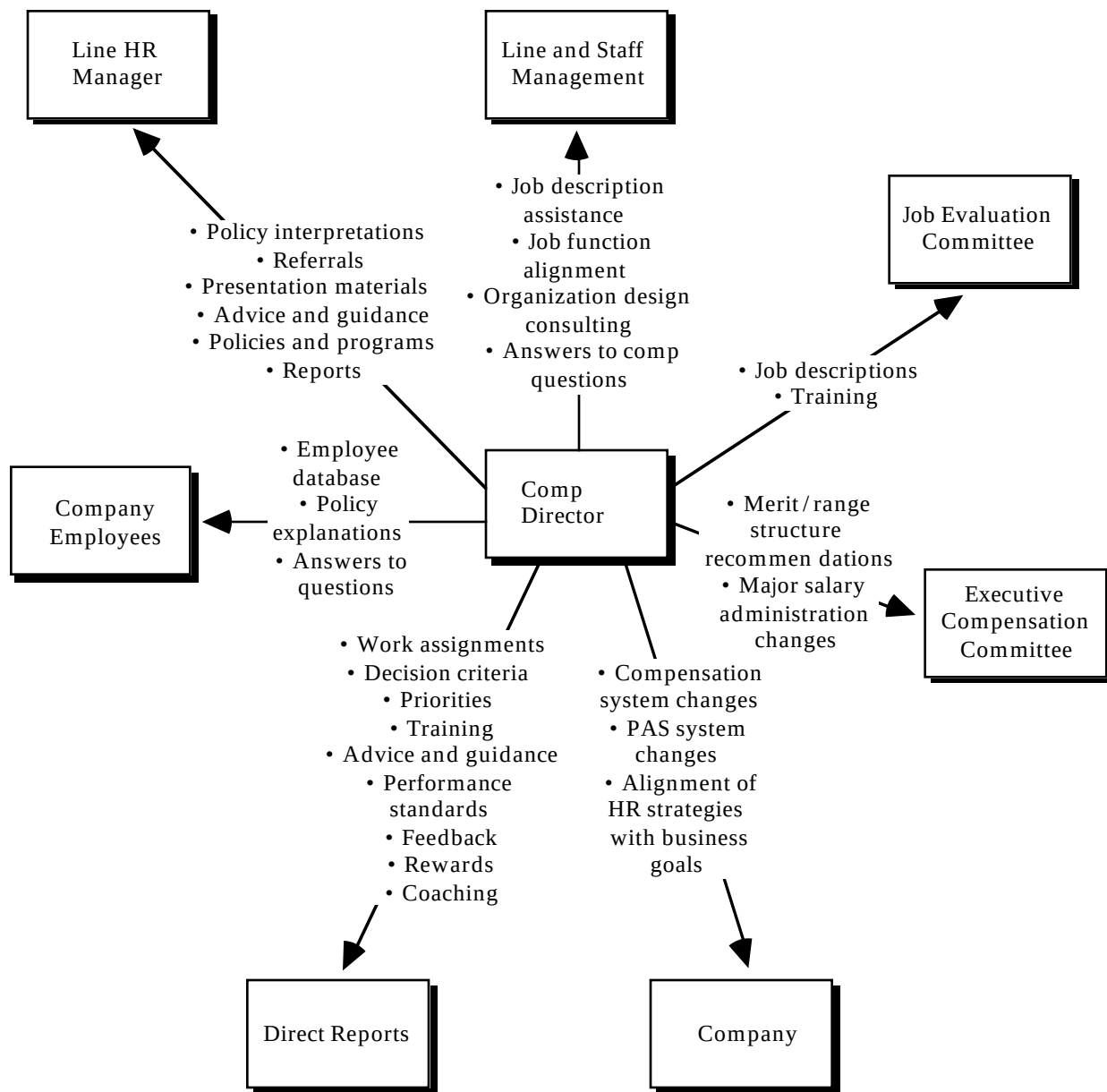
Can Production Supervisor



Can Production Supervisor

Value-Added Results/Weights	Performance Standards
Quality cases (35%)	• 19.42–19.71 labor hours per 1000 cases. • 75%–80% days with all food reviews judged “acceptable” or higher. • \$500K–\$750K of case-holds / year due to controllable factors. (Need to collect baseline data to set actual standards.) • 10%–20% case variance from production schedules.
Motivated and productive employees (25%) • Warehouse needs • Production schedule • Production goals • Solutions to problems • Materials • Training opportunities • Counseling • Rewards and recognition • Discipline	• The Business Unit Manager is satisfied that: • All employees understand how the Company is performing and what contribution they make toward Company goals. • All employees understand the business unit’s goals. • All employees understand the Company safety and quality policies. • All employees know how the shift is doing compared to the business unit goals. • Employees have skills and knowledge to do their jobs, or a plan to obtain them. • Shifts are cooperating to solve business unit problems. • An ongoing informal recognition system is used. • The employees say that: • The work is distributed evenly. • Policy is applied fairly. • They have the equipment needed to perform their jobs, or they understand why not. • They hear about all schedule changes. • They have adequate training to perform their jobs, or a plan to obtain it. • Their personal needs are being met (time off, help with personal problems, etc.).
Improvements to the work processes (25%) • Solutions to problems	• (Shared standard): Entire unit identifies at least 4 projects, analyzes them and makes them ready to implement. • Exceeds = All 4 projects are successfully completed and produce results.
Production information (15%) • Product changes • Log info • Test data • Manual production data to computer center • Payroll data • Communication between packing and warehouse or food processing	• No more than 1–2 justified complaints / month from recipients for late or inaccurate information.

Compensation Director



Compensation Director

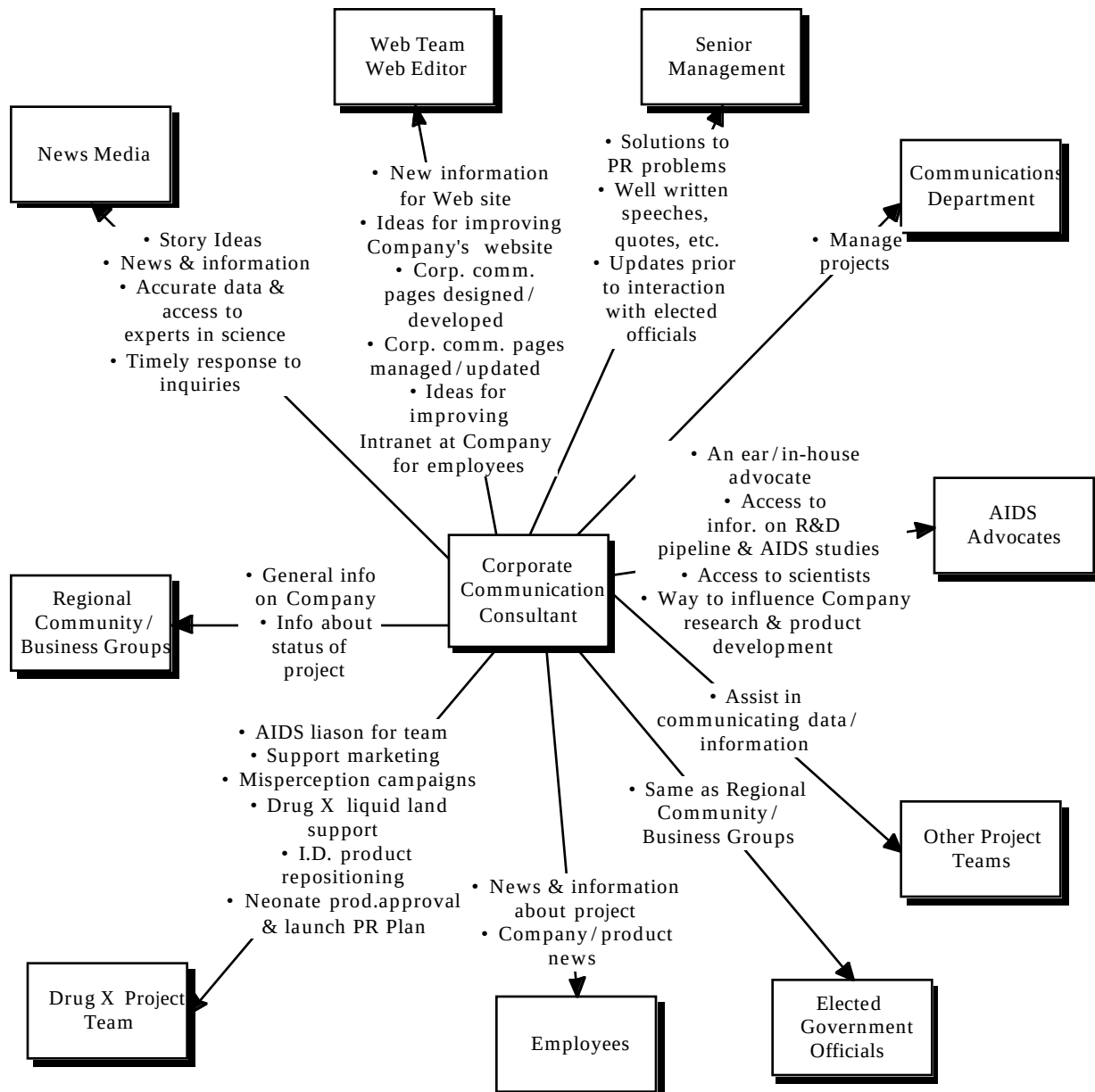
Value-Added Results	Performance Standards
HR strategy linked to business goals	• (Shared with other HR Directors.) VPs and managers say that: • HR policies and programs support the retention of employees. • HR policies are designed to reinforce the majority of employees who do the right thing (and not the exceptions). • Programs and costs are consistent with the corporate values. • Programs or policies are initiated before they are demanded by a problem. • Programs and policies are supported by benchmark data. • Programs and policies are provided in time to support business goals. • They understand the changes in HR programs and policies. • Managers and employees have the skills they need as their jobs change. • Division vice presidents say that the HR programs and policies maintain or enhance employee productivity.
Compensation system that supports business goals • Policy interpretation	• Executive compensation committee says: • They are satisfied with the ratio of payroll cost to premium dollars. • There are enough dollars available to give meaningful rewards for performance. • The compensation program matches other large area insurance companies on salary structure and pay and the overall percentage is not excessively higher than the market. • The compensation program supports strategic business goals of company. • There is internal job equity. • VPs, managers and employees say: • They are being paid competitively for the type of job they're doing within the insurance industry and there is internal job fairness within the Company. • Solutions to specific compensation problems work, are practical and are in time to be useful. • The compensation system allows them to reward employees based on performance. • Line HR Managers say that they understand and support the decision and can explain it to others.
Access to HR databases	• Users of the databases say: • They trust the data in the system. • Data is received in time to be useful or by agreed-upon deadlines. • They know how to access the data independently or know who to ask for help.

Value-Added Results	Performance Standards
Motivated and productive work group • Work assignments • Decision criteria • Performance standards • Priorities • Feedback • Rewards • Coaching • Advice and guidance	• VP HR is satisfied that: • All employees have written performance standards. • All employees know how they're doing compared with their standards. • All employees receive at least 1 interim review / year. • All employees receive an annual written performance appraisal. • The quality of the reward and recognition system is acceptable: • Specific programs are in place. • Evidence of using the programs is available. • Employees report that their efforts are recognized and appreciated. • Merit salary increases are differentiated based on performance (spread of increases between 0% and 10%). • Employees surveyed say: • They understand the Company's direction, department goals and their role in achieving these goals. • They understand specifically what their supervisor expects of them. • They understand how well they are performing and where they need to improve. • Their performance appraisal accurately reflects their performance. • They have the necessary tools and facilities to accomplish their work. Where they do not have what they need, they understand why. • They have the skills and knowledge they need to do their jobs, or a plan to obtain them. • Their good performances are acknowledged and appreciated.
Performance assessment system (PAS) that supports business goals	• Officers and managers say the PAS is: • A useful tool to help them reach their business goals. • Easy to complete. • An accurate way to measure employee performance. • Employees say the PAS: • Helps them understand how they support the Company's goals. • Is easy to complete. • Accurately measures their performance. • Allows them to be recognized for their contribution to the Company.
Organizational designs and job function alignment • Organization and position database	• Line managers say that the redesign or realignment solved the problem they had, or made better use of scarce resources and was completed by the agreed-upon deadline. • Executive VP and VP HR say the change is consistent with current and past practices, flattens the organization, supports corporate strategic business goals and is consistent with the values and culture of the company.

Computer End-User Services Manager

Value-Added Results/Weights	Performance Standards
Motivated and productive employees (65%)	- The End-User Services Manager (E-US) is satisfied that: - All employees have written performance standards. - Employees know how they're doing compared to standards. - All employees are meeting their performance standards or manager is working with the employee to meet the standards. - All employees receive an annual written performance appraisal. - A reward and recognition system is used in the department. - Employee salary increases based on performance. - Surveyed employees say: - They understand Company priorities, department goals and their role in achieving these goals. - They understand what supervisor expects of them. - They understand how well they are performing and where they need to improve. - Their performance appraisal reflects their performance. - They have the skills and knowledge they need to do their jobs, or a plan to obtain them. - They have a career plan or openly discuss their career options. - Their good performances are acknowledged and appreciated. (E-US) Manager is fair with regard to their personal schedule. (E-US) Manager encourages a comfortable working environment.
Satisfied end users (25%) - Smoothly functioning order entry process - Smoothly functioning pricing communications	90%–95% customers rate overall service level at 3, 4, or 5. - Call stats: - X%–Y% call abandonment (TBD) - Average of 45–60 seconds on hold - No more than 3–4 rings before answering - X%–Y% calls on hold (TBD) - No more than 1–2 uncorrected wrong orders / month. 85%–90% of passes are delivered to mainframe within the 15–30 minute window. - Warehouse has necessary information to decide to wait or go ahead with the order. - All problems are reported to buyers. - All fixes are reported to the stores.
Informed manager, support groups, & end users (10%)	- E-US Manager and Director hear of all problems first from the Help Desk Manager (no surprises). - Help Desk Manager provides E-US Manager with all necessary information about the problem by the agreed-upon deadline. - End users are informed of changes in availability of major systems.

Corporate Communication Consultant



Corporate Communication Consultant

Value-Added Results/Weights	Performance Standards
Repositioning Drug X (30%) • Misperception campaign • ID / Infections position • AIDS advocate liaison on clinical trials • Neonate product approval and launch PR campaign • Liquid launch	• Sales increase and perception change (if marketing does research). • Marketing and PR VPs are satisfied that feedback is positive and positioning is occurring. • Drug X project team volunteers to be actively involved in the AIDS advocate liaison. • Drug X project team is satisfied that the product approval presentation for the FDA is well received and reviewed. • Sales increase. • Exceeds = Sales surpass goals. VPs say that progress was greater than expected on changing perceptions and establishing new position in ID.
Effective media relations (15%) • Story ideas • News and information (via press releases, etc.) • Accurate data and access to experts • Company position / perspective on issues • Timely response to inquiries	• Manager is satisfied that: • Media coverage is generated. • Prepared materials are well planned and well written. • Materials are distributed on time. • Reporters are satisfied with timeliness, accuracy and service. • Exceeds = Major hit in major medium.
AIDS advocate liaison (10%) • In-house advocate • Access to accurate information on company, R&D pipeline and AIDS studies • Access to scientists • Perceived ability to influence R&D	• Advocates remain neutral or are positive about the company and Drug X. • Exceeds = Advocates tout Drug X and / or the Company as a biopharmaceutical to work with.
Accurate and exciting Internet Web site (5%)	• News goes live within 30 minutes of release. • Web editor and VP are satisfied with the ideas generated and implemented.
Useful corporate communication pages on the Intranet (5%)	• Employee hits increase to plateau. • Members of the team are satisfied with the ideas offered and implemented by the consultant.
Completed special projects (5%) • Science education long-range plan • Project status reports • Contributions of project consultants • Project budgets	• The long-range science education plan is approved for implementation by the SVP and VP of Corporate Communications. • Progress is clearly communicated at weekly staff meetings. • Company X contract issues are resolved. • Budgets are not exceeded without rationale and approval for additional expense.

Value-Added Results/Weights	Performance Standards
Issues raised to senior management (5%) • Solutions to potential PR problems • Status reports	• VP is satisfied with issues raised and solutions posed. • Senior management is satisfied with reports provided.
Well-written materials for senior management (5%) • Speeches, remarks, talking points, etc. • Briefing and background materials for meetings with elected officials • Follow-up is conducted with elected or government officials on behalf of senior management	• VP and senior management are satisfied with the information. • VP and CEO are satisfied with and use the materials provided. • Follow up activities take place within 2 weeks.

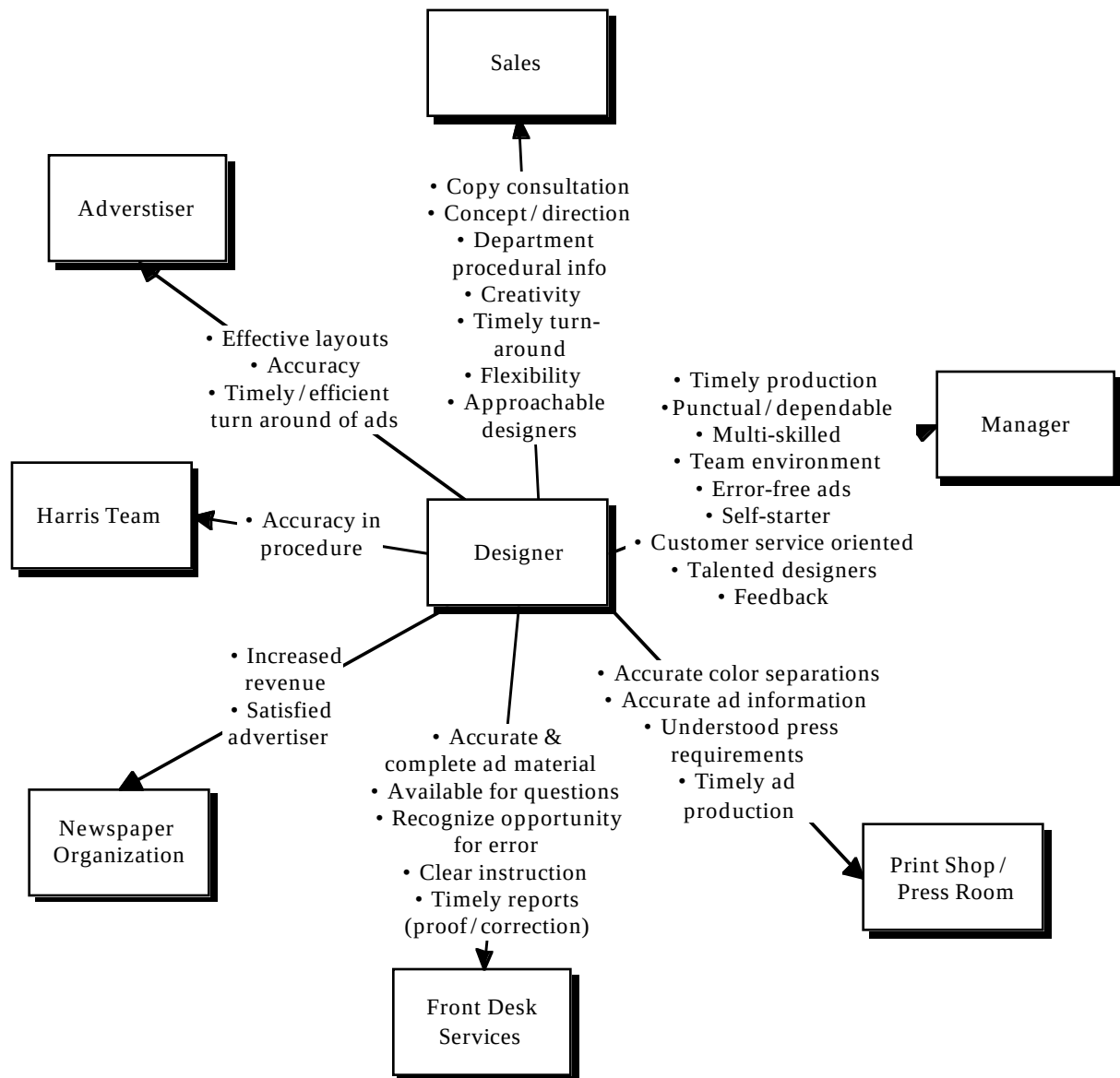
Customer Service—SAC

Value-Added Results	Performance Standards
Agreement processing	• Accurately processing / completing renewal and warranty paperwork 60–90 days prior to expiration. • Accurately processing / completing new requests within 24 hours of receipt. • Processing accepted agreements within 24 hours (for current effective date) and within the week (for future effective dates) of receipt of purchase order.
Customer focus and satisfaction	• Conducting pre-calls on renewals 60 days prior to expiration, ensuring customer receipt and taking necessary steps, re-sending the same day if required. • Providing Account Specialists with clear, concise and accurate information regarding agreements on their accounts, and transmitting the Instruments Not Renewed Report weekly or monthly depending on district requirements. • Providing backup to SAR in quoting extended service pricing for CSRs as requested but no later than 4 hours from request. • Resolving customer inquiries or problems using professional and proper telephone etiquette on initial call, or responding prior to specified time by utilizing reference material and / or involving appropriate individuals / departments. • Using available tools (phone mail, Win pop-up, notesmail) to effectively communicate with peers and management, keeping them informed of service agreement issues in the department.
Administration and system maintenance	• Reviewing on-line procedures to ensure complete understanding of their application as it applies to service- agreement processing. • Reviewing the weekly “Proposal Status Report” and taking appropriate steps to resolve discrepancies. • Submitting monthly SAC report to include proposal status and any obstacles that exist. • Preparing monthly IC report to include all qualified reimbursable IC, and submitting it to Finance no later than the 10th of each month. • Keeping agreement files current and orderly to allow easy access by teammates. • Maintaining accurate agreement records and address changes to existing agreements, following ISO requirements as necessary, and the same day the change is made, processing credit memos and re-invoicing as needed. • Setting up new instrument adds daily upon receipt of the Daily Shipments and Returns Report. • Accurately updating the Instruments Not Renewed Report Log as purchase orders are received or information is received.

Data Systems Coordinator

Value-Added Results	Performance Standards
Systems up and running	• No data loss bringing systems up or down. • System A is available 90-95% of the time. • No more than 3–6 systems down / year.
Resolved problems • Identified resources • Satisfied customers	• 1 justified complaint / quarter. • Customer satisfaction phone survey result averages state says that person met customer expectations for: • Timeliness • Pleasantness • Friendliness • Respect
Completed backups	• 2–3 backups / quarter that must be repeated due to errors.
Transmitted and received files • Processed tolls • Processed customer files	• No more than 1 call / quarter from outside the computer room identifying bad or inaccurate toll data. • No more than 1 call / quarter from a customer due to faulty output noticed by the customer. • No more than Once / quarter not processing a customer file within 24 hours of receipt.
Maintained documentation • Written turnovers • Updated procedures • Maintained logs	• No more than Once / quarter a procedure is noted as unclear or doesn't work as written. • No more than Once / quarter an inquiry is not answerable by looking in the log or turnover.
Produced, filed and distributed reports • Recorded time and equipment utilization • Processed monthly reports	• No more than 5–15 calls / month from customers on mis-distributed, incomplete or late reports.
Maintained tape files	• No more than 2–5 calls / month from the field due to errors, misrouting or lack of tapes.

Designer



Designer

Value-Added Results/Weights	Performance Standards
Satisfied customers (30%)	• No less than 90%–95% credit-free ads. • Sales is satisfied that: • Designers are pleasant, open and accessible. • Designers consistently provide unique, appropriate and effective layouts. • Designers provide information on dept. procedures. • Designers are accommodating with special requests. • No more than 1–3 justified complaints / quarter.
Effective layouts (30%)	• Layouts meet following established design principles: • Strong message / headline • Geared to target audience • Strong priority of elements • White space • Balance • Proper type selection • Appropriate graphics • Readability • Effective use of color • Clear, creative approach • Exceeds = Combination of all elements that make up ad: flair, use of type, impact, uniqueness, unconventional, atypical, sense of movement, stands out when looking at typical ads in paper.
Efficient work flow (20%)	• 6.5–7.0 layouts / day on monthly average. • Designer must arrive at scheduled shift start and be prepared to work. • Provide necessary backup when workload permits and share pertinent information and resources with other teams. • Exceeds = Travel to another locale to perform work when needed and say “yes” when asked to work outside scheduled time.
Efficient team (20%)	• Manager is satisfied that the designer: • Shares pertinent information and resources with team members. • Actively seeks out opportunities for growth. • Actively seeks out new work assignments and is willing to work where needed. • Exceeds = • Available for sales representative to go on road and advise advertisers on marketing strategies. • Advise sales staff on how to sell design.

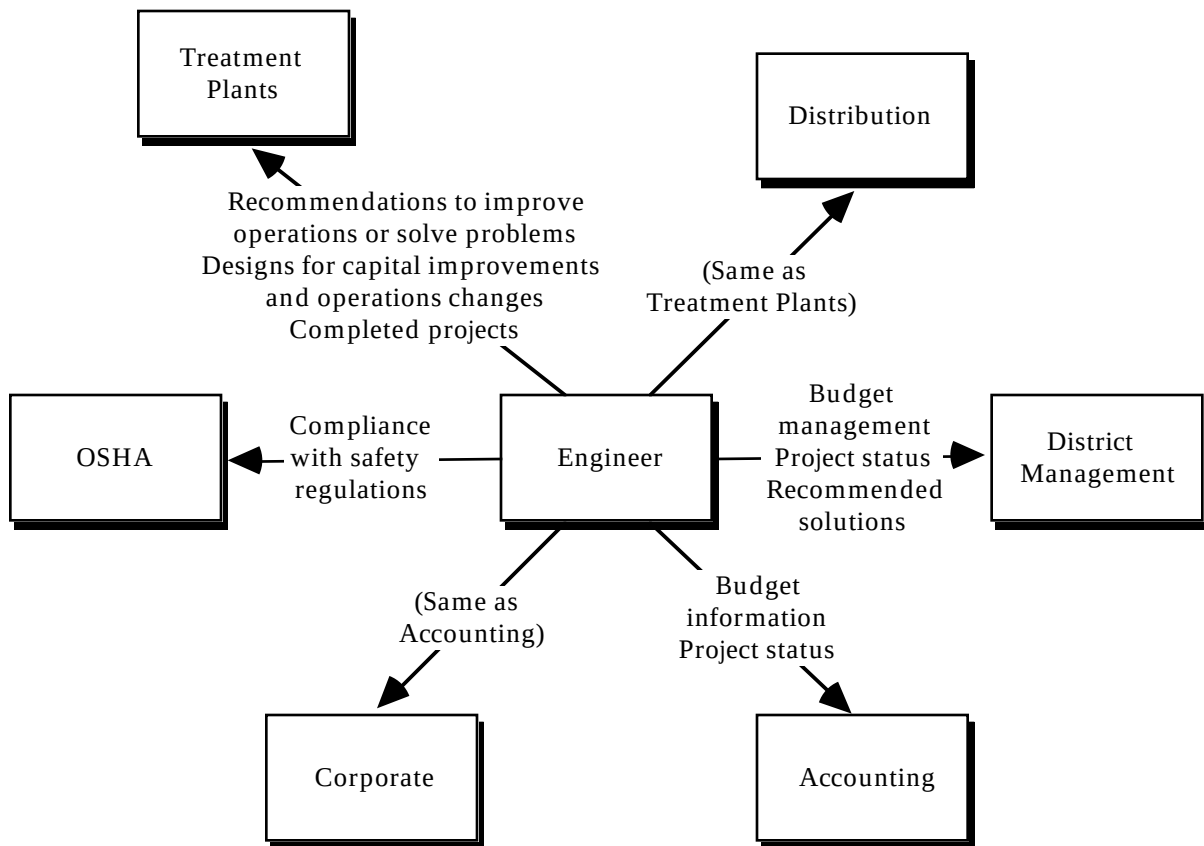
Drilling Engineer

Value-Added Results	Performance Standards
Drilling alternatives	• Management agrees to use the alternative. • Alternative is successful within the time and cost projections. • Exceeds = Alternative is new to the Company.
Dry hole costs	• $\pm 10\%$ actual vs. projected costs. • Provided costs by agreed-upon deadline.
Offset history • Analogies	• Management is satisfied that no unanticipated drilling problems occurred. • Management is satisfied that the offset history contains data that supports alternatives.
Procedures for drilling and completions	• No more than 2–3 times / year a procedure fails to work mechanically as written. • Management agrees that the procedure is the most cost-efficient one. • No more than 2–3 times / year someone else's work is held up because of late procedures or cost estimates.
Cost estimates for drilling and completions	• No more than 5% of work orders require supplements. • Provided costs by agreed-upon deadline.
Work schedule	• Management is satisfied that the actual progress matches the projected schedule (accounting for changes in direction).
Daily reports	• Engineer and geologist are satisfied that the data is accurate and is sufficient to let them know what is going on in the operation.

Employment Supervisor

Value-Added Results	Performance Standards
Advice and solutions to problems	- Customers are satisfied that: - The advice is productive. - The supervisor is available when needed. - The manager follows the advice.
Productive employees - Forms administration - Qualified new hires - Data input to MSA - Temporary agency interface	- All forms are completed accurately. - New employees have a good understanding of the Company and their benefits at the time of their hire. - Pay and benefit information is input by the deadline. - Hiring supervisor is satisfied that qualified employees are hired by the agreed-upon deadline.
Legal/regulatory compliance and interpretations	- Off sites complete I-9 forms according to guidelines. - No regulatory agency inquiries due to employment supervisor error. 95% of EDD data inquiries are responded to within 10 days.
Motivated and productive staff members	- Executives say they are satisfied with the department's performance. - Employees are learning new skills and applying them to the work process. - Employees say that their efforts are acknowledged and appreciated. - Employees say that the supervisor is accessible for problem resolution.
Alignment of employees with company goals	- Training is delivered by agreed-upon deadlines. 80%–90% of attendees say that the training objectives were met. - Supervisors observe attendees demonstrating their new skills on the job. - At least 3 PMS, LP and IC courses/year are delivered.
Completed special projects	Employment outsourcing recommendations are made by the end of the second quarter.

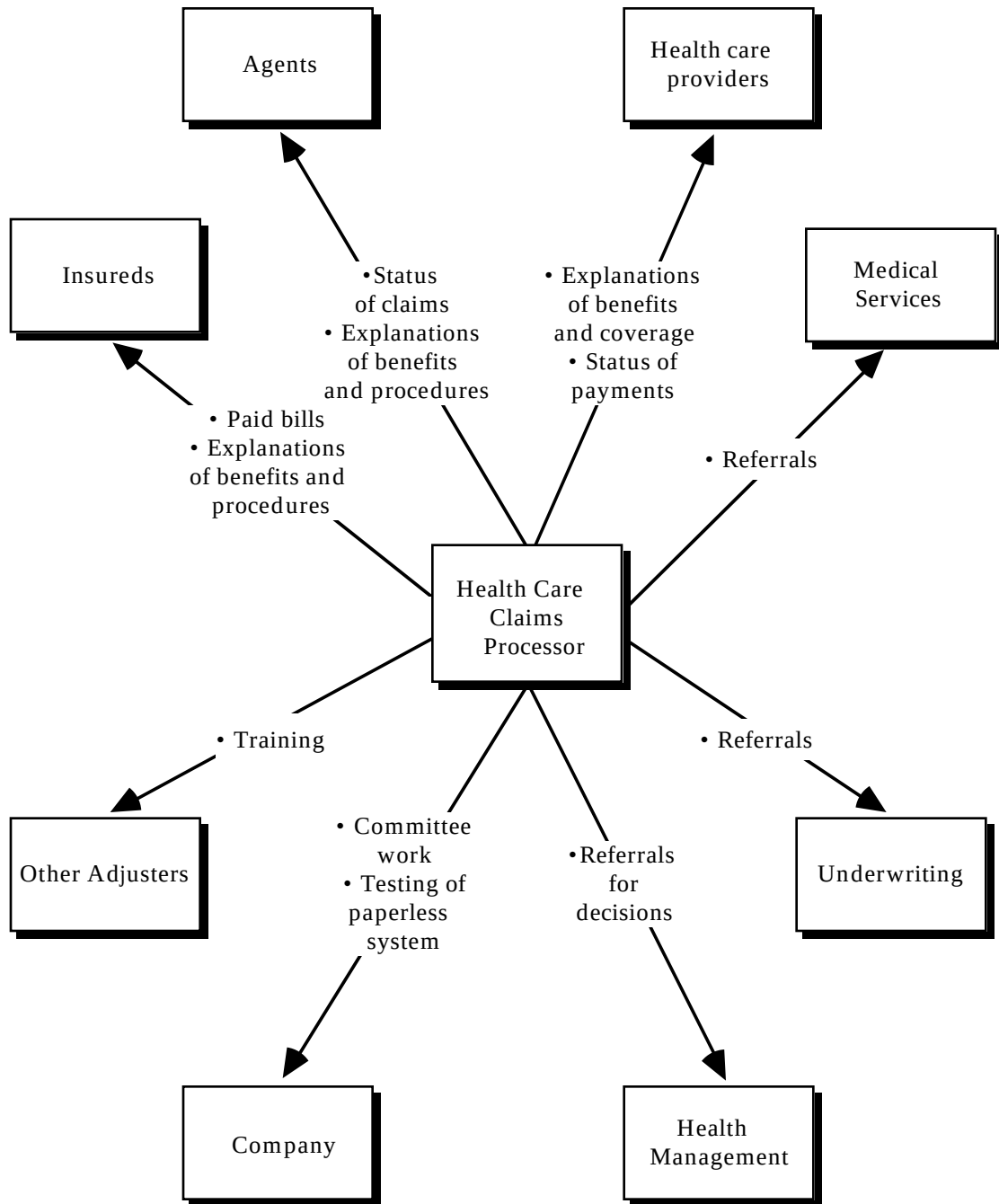
Engineer



Engineer

Value-Added Results/Weights	Performance Standards
Designs for capital improvements and operations changes (30%) Survey results	- Company, state, district and plant/ distribution management are satisfied that: - The cost estimate is sufficiently itemized. - There is backup documentation for all cost estimates. - There is consistency across design documents. - The design looks like it will solve the problem or meet the need. - The design doesn't cause new problems while solving the original problem. - Regulatory personnel are satisfied that the design meets regulatory requirements. - Actual results match the expected results or solve the problem. - No more than 3% cost overruns due to inaccurate quantities. - No design changes are required during construction due to conditions that were overlooked. - The design's completed by agreed-upon deadline.
Completed projects (25%)	- The project is constructed according to the design. - Unexpected conditions are successfully worked around. - Local personnel are able to use the new equipment as constructed. - No more than $\pm 5\%$ variance from contract cost. - Project is completed by agreed-upon deadline.
Recommendations to improve operations or solve problems (20%) Engineering studies	- Management is satisfied that: - The recommendation will solve the problem. - The cost data is detailed enough to make a go/ no-go decision. - Regulatory agency or Engineering Manager agree that recommendation complies with regulations. - Exceeds = Engineer initiates an innovative original solution which is agreed to. - Recommendations are made by agreed-upon deadline.
Budget management (20%) Status reports	- Budget report is submitted by the fifteenth day of month. - Engineer is able to answer questions about project financial status at any time.
Compliance with safety regulations (5%)	- No more than 2 OSHA visits/ year. - No OSHA fines. - No insurance rate changes due to safety violations. - Employees are trained on new regulations by agreed-upon deadline.

Health Care Claims Processor



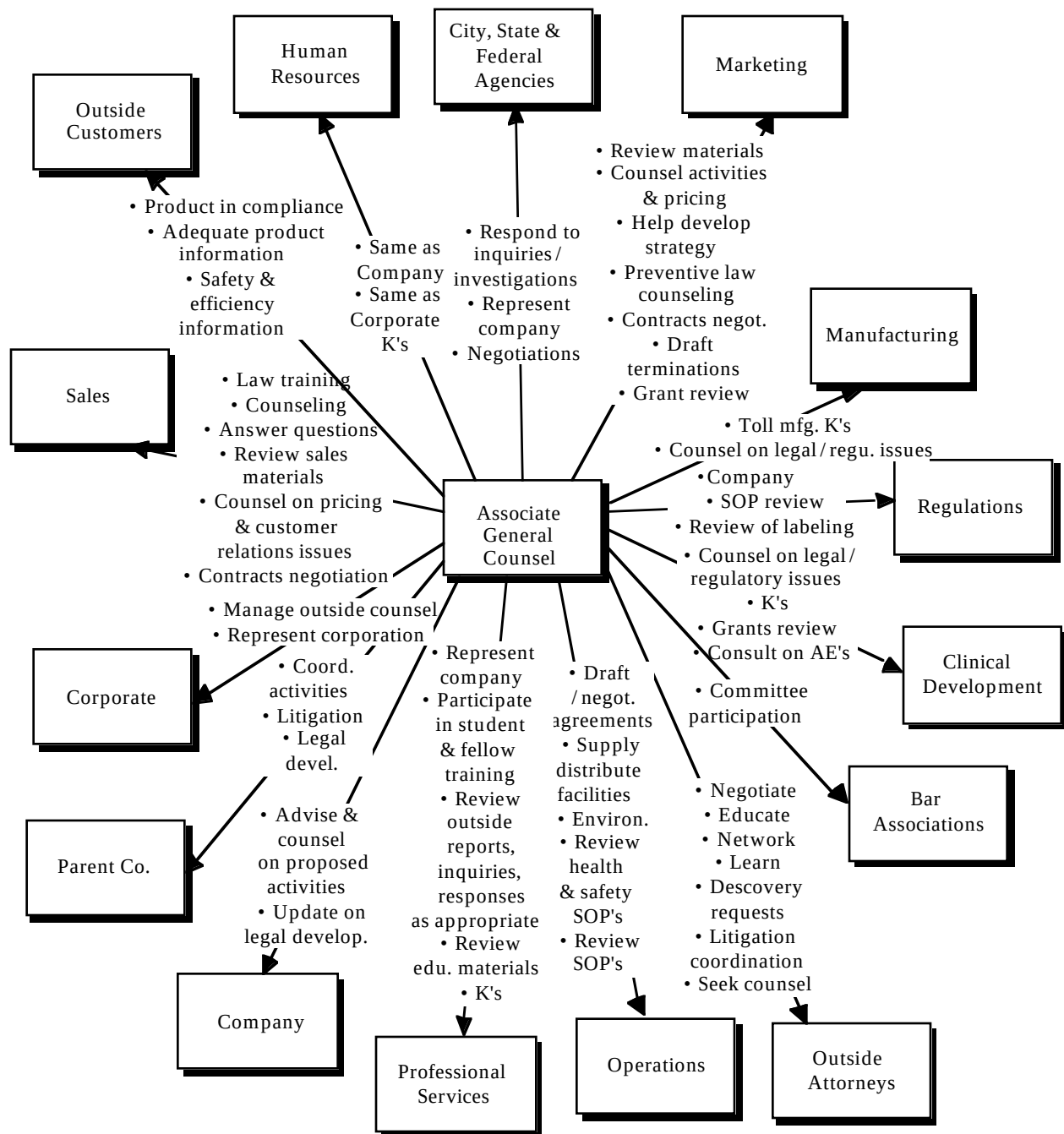
Health Care Claims Processor

Value-Added Results/Weights	Performance Standards
Processed claims (30%)	• 325–380 transactions completed / week. • No more than 1 justified complaint / year from insureds, agents, or medical providers for incorrectly denying an entire claim. • Supervisor is satisfied that the adjuster requests the appropriate number of medical reports, contacts the correct medical providers, asks the right questions and correctly interprets the information provided. • For at least 45–46 weeks / year, the oldest carry-over work on Monday is less than 7 working days old.
Insureds who understand how benefits were allowed (20%)	• No more than 1 justified complaint / year from insureds, agents or medical providers due to unclear determination of benefits.
Satisfied agents (15%)	• Supervisor hears agents saying the adjuster: • Returns their calls promptly. • Involves them as much as they want. • Does what he/she promised to do. • Gives them accurate information.
Answers to health care providers' questions (15%)	• No more than 1 complaint / year to the supervisor from health care providers due to inaccurate information.
Decisions to refer to Underwriting, Medical Services and Health Management (10%)	• No more than 3–4 files / year are returned to the adjuster because the adjuster should not have referred them to health management. • Supervisor is satisfied that the adjuster requests the appropriate number of medical reports, contacts the correct medical providers, asks the right questions and correctly interprets the information provided. • Adjuster refers pre-existing condition files as soon as sufficient information is available. • Adjuster refers appropriate files to Medical Services in a timely manner.
Trained co-workers and agents (5%)	• Co-workers trained by the adjuster are able to do their task correctly. Exceeds = Co-workers do the task correctly and don't need to ask questions. • District Manager is satisfied with the training provided and is willing to have the adjuster come back.
Completed committee work (5%) • Computer system ready to process Premium Care claims	• The state-specific mandated coverage information is provided to the committee in a timely manner. • Computer system is able to correctly process claims in all states.

Human Resources Director

Value-Added Results	Performance Standards
Corporate business results	• Meet corporate EVA objective.
Satisfied and motivated employees	• Develop PVA measure during 199X. • Meet corporate PVA (people value-added) objective.
Staffing • Executive-level hiring decisions • Management hires from outside	• President is satisfied that mission-critical positions are filled within an acceptable amount of time.
Competent work force • Up-to-date competency database • Work force skills aligned with corporate goals • Development • Succession planning	• % employees who have contact with customers who are certified as knowledgeable about Company products and services. • The number of store manager candidates match the demand. • The six methods of development are in place (Company University, full-time job change, part-time in-place assignments, feedback, learning from others, self-development.) • Training and staffing is available to support Company. • A list of store-level skills and competencies exists. • The city's graduate employment portfolio standards and preparation skills are integrated with hiring and development processes.
Organizational designs	• Aligned performance goals exist between Senior Management and all related departments. • Aligned performance goals exist between the executive chef and department managers at store location. • Demonstrated successful application of network mapping resulting in: • Elimination of silos. • Aligned performance goals based on the network map interrelationships.
Reward systems • Value-added corporate measurement system	• President is satisfied that the value-added measures do a better job of measuring than the existing system. • Senior management adopts a new reward system using value-added measures tied to corporate core competencies.
Performance management system	• Senior management is satisfied that the new performance management system supports the successful implementation of a corporate priority. • 199X lump sum distributions are made based on store performance management data. • Performance management system is successfully implemented down to the store level.
Motivated and productive HR team	• Meet HR department PVA goal. • Each employee has a written performance plan.

Lawyer



Lawyer

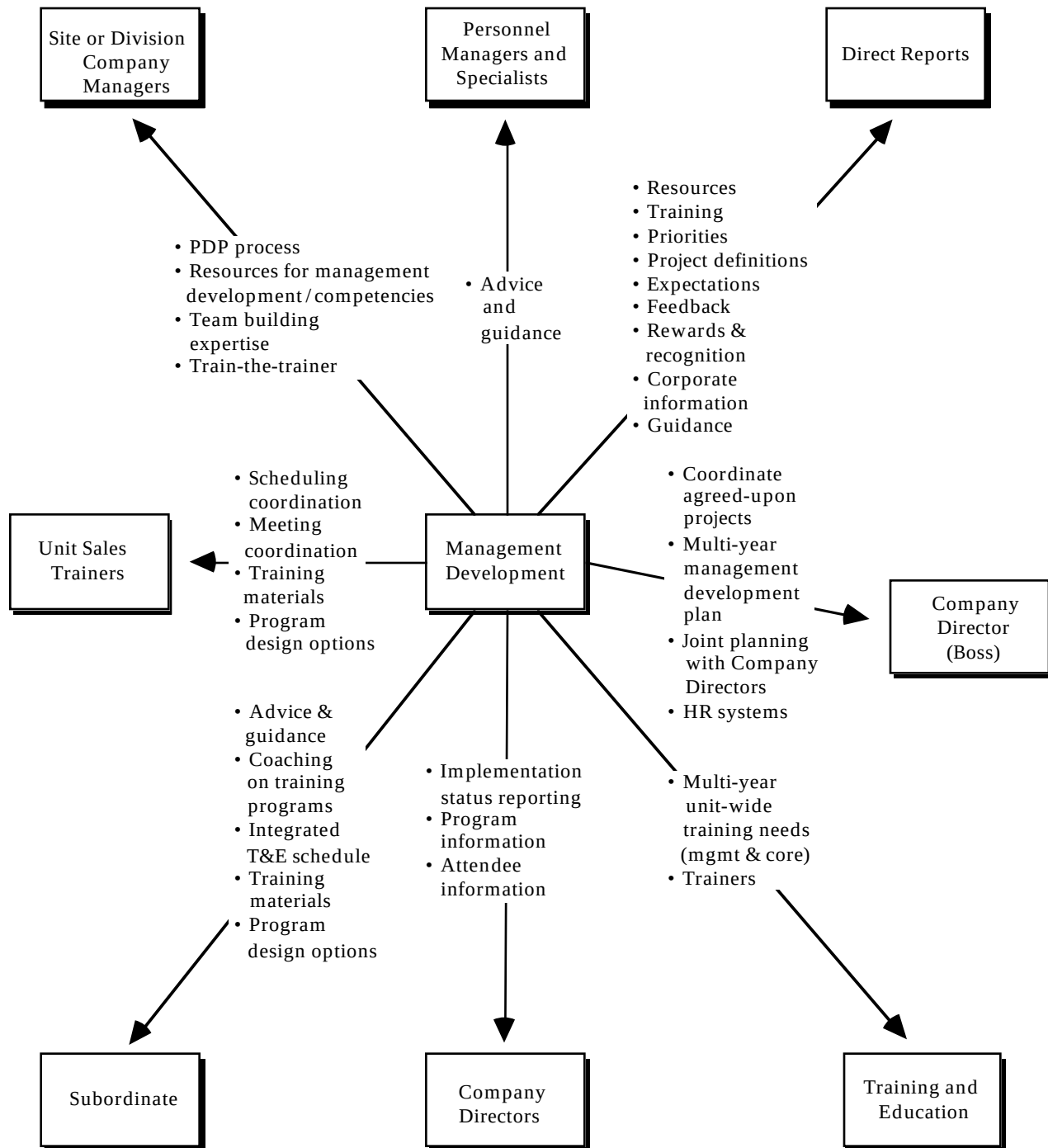
Value-Added Results	Performance Standards
Legal and ethical representation of company and products in the marketplace	• Clients say they understand what they need to do to get / keep Company in compliance with applicable laws, regulations and ethical standards. • Clients first hear legal implications of outside developments from the Associate General Counsel (AGC).
Legal advice	• Clients are in compliance with the AGC's legal advice. • Clients are satisfied that: • The advice was relevant to their situation. • Their needs were addressed and the cost / benefit relationship of the advice was positive. • The advice was received in time to be useful.
Executed agreements	• The client and vendor are satisfied that the agreements: • Are complete, readable and comprehensive. • Are completed in time to avoid delaying the work. • The client is satisfied that the agreements: • Contain favorable terms for the Company. • Describe what the Company gets and gives as part of the business terms. • Exceeds = The execution takes less time than the parties expected.
Prevented litigation	• General Counsel is satisfied with: • The reduction in the number of matters going into litigation. • Clients' comprehension and compliance with legal advice. • How quickly clients are provided information they need to prevent litigation. • Exceeds = Litigation is eliminated.
Resolved litigation	• Cases are resolved in favor of the Company. • Cases are settled within the established settlement cap. • Exceeds = Cases are settled below the established acceptable range.

Maintenance Mechanic

Value-Added Results	Performance Standards	How Track
Completed repairs, replacements and installations - Do it now - Projects	- No more than 1-2 repeat visits / month (within 1 hour) for the same problem. - Initial response to call is made immediately, and repair work is started within 30 minutes of the call. - Foreman is satisfied that the Mechanic took the extra time and care to make sure the job looks good, is easy to maintain, and isn't likely to have problems. - Mechanic completes the job within the agreed-upon time estimate.	- Call log (recording second call) - Call log (recording problem, call time, start time) - Foreman personally inspects a sample of projects. - Foreman reviews actual time spent on a sample of projects and compares to the agreed-upon estimate.
Decision to fix it or push it off	No more than one time / month is a job incorrectly pushed off to people who aren't assigned to "Do it now."	Recipients of the jobs tell the foreman when the work could have been done by "Do it now."
Satisfied patients and staff	- Surveyed nurses in the area say that the Mechanic: - Explains the problem, what he/she did, and if necessary, what will happen next and when. - Introduces self to patients, asks the patient for permission to come in. - Takes patient's needs into account while doing the work. - Exceeds = Foreman is satisfied that Mechanic is: - Following up with the department to see if the problem is resolved. - Offering to investigate it again before the department calls.	- Foreman contacts a sample of 5 departments (person to be selected by employee) and asks about service levels. - Foreman visits a sample of departments 1 week after work is done and asks questions.
Skilled co-workers - New tasks for existing employees - Training new employees	- Mechanic certifies that the co-worker is able to independently do the new tasks up to hospital standards. - Exceeds = The trained co-worker is able to train another person.	Foreman says what skills the co-worker is to learn. Mechanic tells foreman when co-worker is trained and foreman reviews the co-worker's work.

Value-Added Results	Performance Standards	How Track
Informed foreman	• Foreman is able to answer boss's questions on the status of current jobs.	• Foreman observation.
Ideas to improve department's service	• At least 1 idea offered / year to improve the department's service. • Exceeds = Idea has a significant effect on the department, or the Mechanic leads the implementation of the idea.	• Inform foreman and keep own list.

Management Development Manager

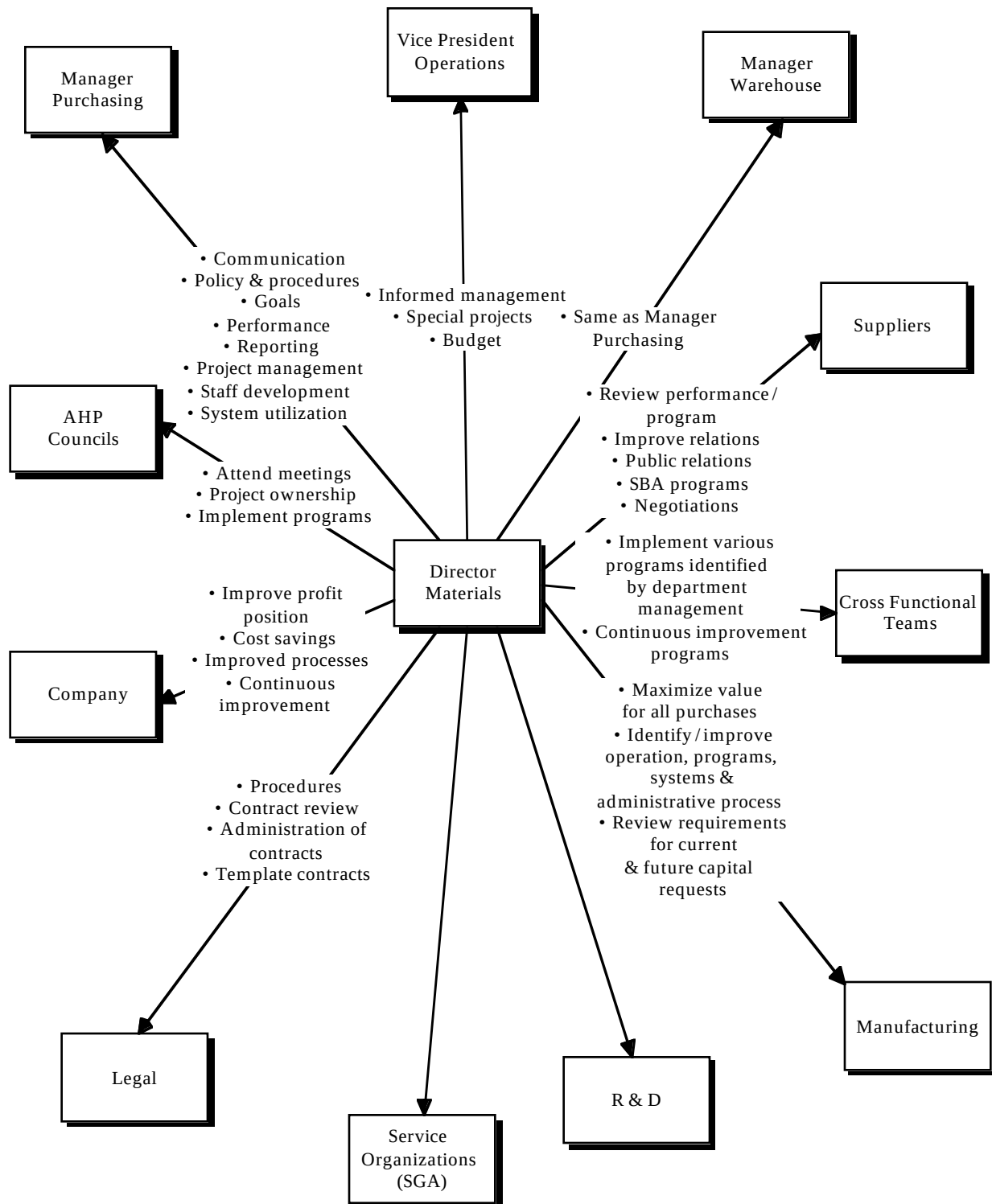


Management Development Manager

Value-Added Results	Performance Standards
Fully integrated Performance Management process	- Line managers say that: - The PMS is easy to use. - The time required is well spent. - The process helps them produce a motivated and productive work group. - Company management is satisfied that the system: - Assesses associate strengths and weaknesses. - Creates a valid development plan. - Accurately evaluates performance using verifiable, results-based performance standards. - Materials and training are available to the Company by 4Q 9X. - System is developed within agreed-upon budget variance.
More competent managers (shared) - Resources for management development/competencies - Self-sufficient management development processes	- Company Director and Plant Managers are satisfied that all of the Company managers are using the suggested management development tools. - Exceeds = Plant manager, staff, etc. come to the Company manager for help with management development and team development issues. - Exceeds = Plant manager, staff, etc. come to the Company Manager for advice and counsel on business issues.
Motivated and productive associates - Resources - Training	- The Director is satisfied that: - All associates understand how the Company is performing and what contribution they make toward the Company's goals. - All associates have written performance and development plans. - All associates know how they're doing compared to their performance objectives. - All associates receive an annual performance review. - An ongoing informal recognition system exists. - Surveyed associates say that: - They understand the Company's direction, their department's goals and their role in achieving these goals. - They understand specifically what their manager expects of them. - They understand how well they are performing and where they need to improve. - Their performance appraisal accurately reflects their performance. - They have the necessary tools and resources to accomplish their work. Where they do not have what they need, they understand why. - Their good performances are acknowledged and appreciated.

Value-Added Results/Weights	Performance Standards
Informed directors	• Company directors say that: • They understand the progress made compared to the management development plan. • They hear of any issues or problems in advance. • Scheduled updates and reports are given at company senior staff meetings.
Multi-year, unit-wide management development/training plan	• Company directors are satisfied that the plan: • Defines the management development direction for the organization for the next three years. • Correctly identifies the organization's high priority needs. • Is likely to meet the needs. • Can be implemented without additional headcount and within the approved budget. • Submitted by 1Q9X.
Completed projects • Annual market data rollup summary	• (Shared with Systems) Company directors are satisfied that the summary: • Gives them an accurate picture of the organization's performance and development positioning. • Answers their questions easily. • Is completed 2 weeks before they have to report to their line managers.
• Regional performance appraisal implementation	• Company unit heads say that: • The system is easy to use. • The time required is well spent. • The process helps them create a motivated and productive work group. • Company unit management is satisfied that the system: • Assesses associate strengths and weaknesses. • Creates a valid development plan. • Accurately evaluates performance using verifiable, results-based performance standards.
Accurate training database	• (Shared with Systems Group) Company directors are satisfied that the: • Database answers their question easily. • Attendance data is no more than 1 month old. • Output is useful.

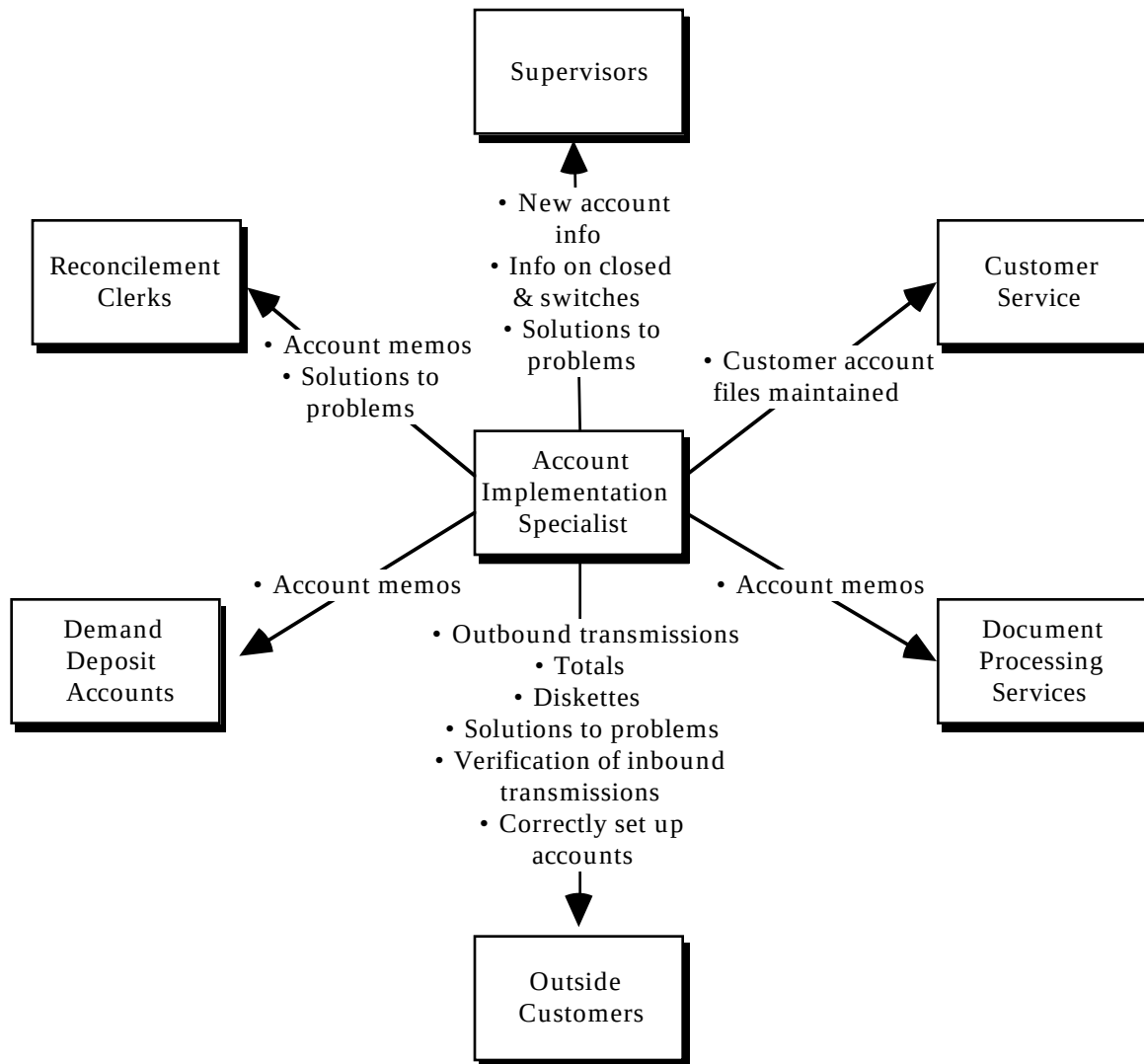
Materials Director



Materials Director

Value-Added Results/Weights	Performance Standards
Maximized value of all purchases (25%)	- Purchasing management is satisfied that: - Top 80% of suppliers (based on purchases) are under contract. - Corporate contacts are used to benefit the company. - Target savings of 10% of budget. - Target savings of 4%–6% of total purchases.
Process improvement programs (20%)	- Purchasing management is satisfied that: - All teams have established goals. - All members have clear responsibilities. - Progress is consistent and published. - Process benchmarks are measured via industry standards (if applicable). - New processes are reviewed quarterly.
Completed special projects (20%) - Report writing tool - Meeting planning - Inbound freight	- The report writing tool is selected and it produces meaningful reports. - A primary meeting planning provider is selected.
Policy, Procedures and SOPs (10%)	- Purchasing management is satisfied that: - All policies, procedures and SOPs are reviewed twice a year. - Policies are communicated and distributed properly. - Deviations are reported and a plan of action is developed to address the deviations.
Informed management (10%)	- Purchasing management is satisfied that: - Meaningful reports are submitted. - Results are used to improve service levels of staff and suppliers. - The CAPS study findings are applied to the company purchasing.
Regulatory compliance (5%)	- No major out of GMP compliance for the year. - All employees are trained in all SOPs. 2%–3% of purchases are for SBA.
Trained staff (5%)	Purchasing management is satisfied that all staff have an defined career path with related training requirements.
Supplier relations (5%)	- Procedures are developed to review processes and blanket orders for the top 100 suppliers at least once a year. - Total number of suppliers are reduced by 5% compared to the previous year. - Routine reports to suppliers are established based on the company rating system.

New Account Specialist



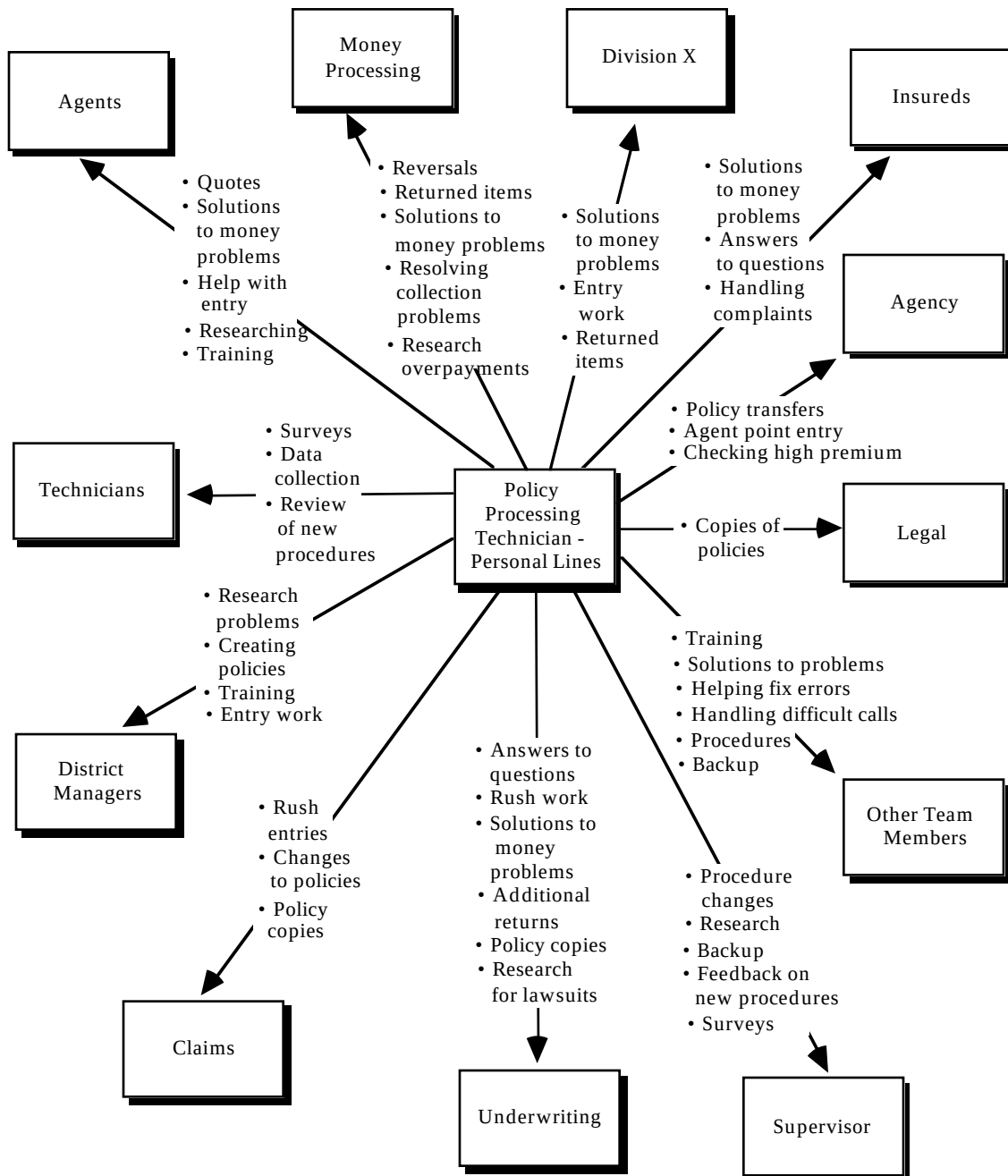
New Account Specialist

Value-Added Results/Weights	Performance Standards
Correctly set up new accounts (35%) • Computer databases	• No more than 3–4 customer complaints / year. • No complaints from “hot list” customers. • No more than 2 errors / quarter spotted by supervisor audit. • No more than 4–5 late accounts / year (processed later than 24 hours from receipt).
Satisfied customers (35%) • Verification of totals and inbound transmissions • Outbound transmissions	• (Shared standard) 94%–98% of customers on monthly survey say they are satisfied • (Shared standard.) 120–150 customer inquiries / month on quality report. • 100% of discrepancies identified. • (Shared with reconcilers) No more than 2–3 late transmissions / year without notifying the customer.
Account memos (20%) • New accounts • Closed and switches	• No more than 1–2 errors / quarter that are noticed internally.
Solutions to problems (10%)	• No more than 1 complaint per year to supervisor for problems solved later than the agreed-upon deadline or where the problem is repeated.

Organizational Development—Senior Consultant

Value-Added Results	Performance Standards
Trained employees	• Employees leave training with increased ability to use tools and skills. • Exceeds = Employees' supervisors verify that the individuals have increased their skills during attended workshops.
Software solution for documenting employee job and training records	• End users are satisfied that the software is efficient, usable and flexible. • Cost/benefit analysis is used as leverage to support implementation.
Succession planning process	• Process is in place domestically for level 8 and above by the end of the Q3. • VPs agree that the process is a quality planning tool.
Succession plan	• LTR/JPW succession plan is presented to the board of directors by MM/YY. • VP HR agrees that the plan meets expectations.
Functional MI strategic team	• MI team establishes performance foundation, measurements and feedback mechanisms. • Program project leaders agree that an integrated approach has value.
Self-sufficient new product development teams	• Team effectiveness assessments verify a positive increase in functionality. • Program management verifies an increase in self-sufficiency.
Process for documenting job and training requirements for the Company quality policy	• Audits support compliance. • Requirements are met by MM/YY.

Policy Processing Technician



Policy Processing Technician

Value-Added Results/Weights	Performance Standards
Satisfied insureds (15%) - Answers to questions - Resolved complaints	- No more than 1–2 justified complaints / year reach the supervisor. (Shared standard) 80%–90% renewed policies. 90%–95% of surveyed customers say the: - Information they received was correct. - Technician took time to listen to them. - Technician understood their situation. - Technician didn't transfer them more than once. - Technician got back to them as promised.
Satisfied agents (15%) Accurate point statements	(Shared standard.) Agents at district manager meetings say the team: - Returns calls promptly - Does what it promised. - Gives accurate information.
Completed policies (15%) - New business - Changes - Transfers	- No more than 5–10 errors / year are spotted by insured, agent, underwriting or other team members. (Shared standard) No more than 1–2 times / month someone on the team gets a second call for the same issue or problem. - At least 5–26 weeks / year there are no changes more than 2 weeks old. - At least 5–26 weeks / year there is no new business more than 3 days old.
Solutions to money problems (10%) - Reversals - Returned items - Collection - Overpayments	- No more than 3–6 errors / year spotted by someone "downstream." - No more than 1–2 complaints / year because the problem wasn't solved or the next possible step wasn't taken within 3 days.
Answers to questions (10%) Explanations of procedures	80%–90% surveyed team members and a sample of people outside the team say: - The Technician stops working and tries to answer the question as quickly as possible. - They don't find out later that the answer is wrong. - If the technician doesn't know the answer, he / she either researches the solution or directs the person to the correct source.
Trained and confident team members (10%)	- Trained employees have no more than a 3%–5% error rate on the jobs they've been trained on. - Training is completed by the agreed-upon deadline.
Premium quotes (5%)	No more than 2–3 quotes / year are found to be inaccurate at issuing.

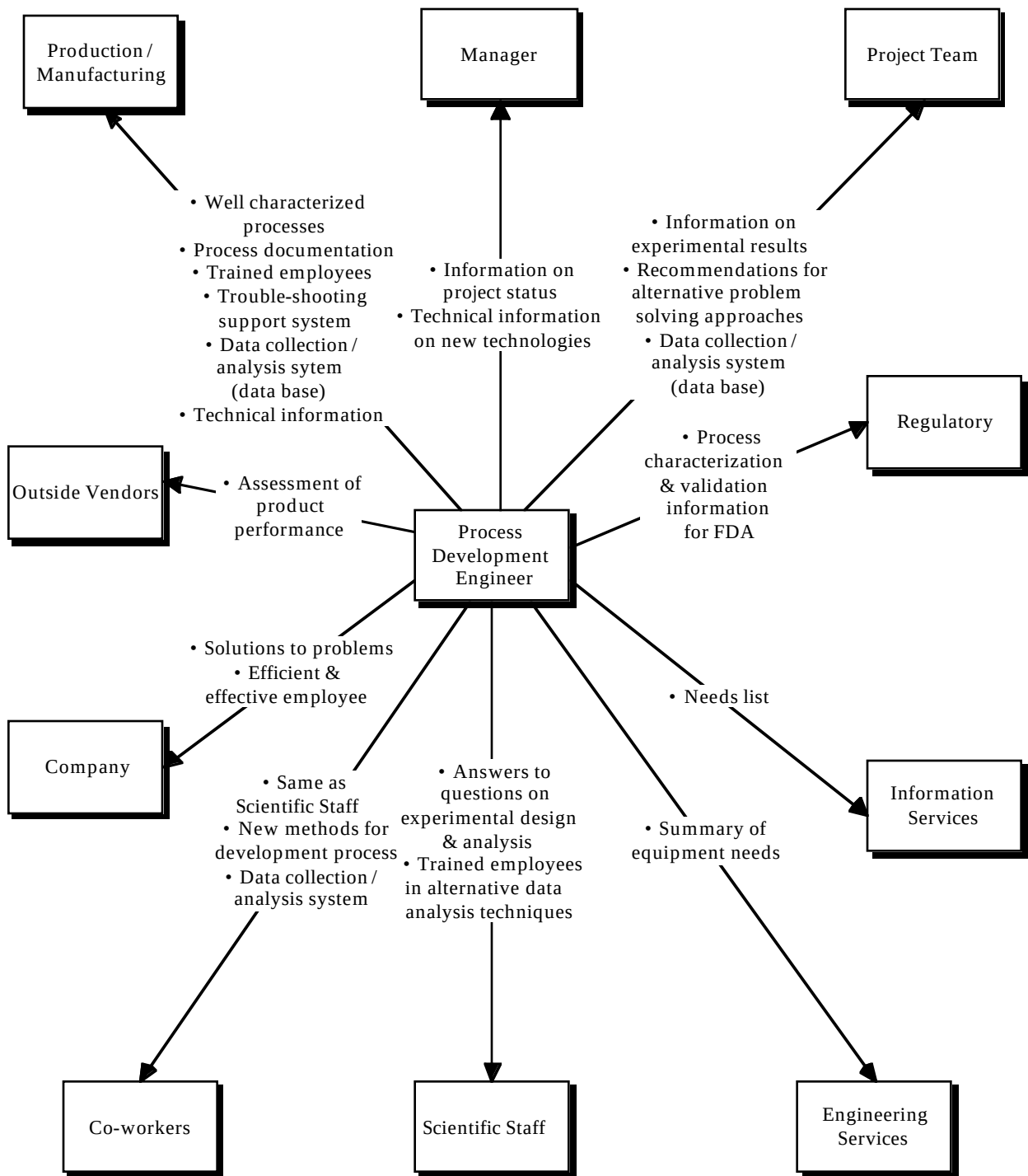
Value-Added Results/Weights	Performance Standards
Trained agents (5%)	• Surveyed agents are satisfied that the: • Trainer was well informed. • Information was helpful. • Training allowed enough time for questions. • Trainer allowed enough time for the training. • Pertinent information was covered. • They are willing to recommend the training to someone else.
Backup to supervisor (5%) • Time sheets and paychecks • Meeting attendance • Research on calls or letters	• The supervisor is satisfied with the amount of work remaining upon returning to work. • Team members say the team ran smoothly while the supervisor was away. • The paychecks are accurate. • Supervisor is satisfied that the meeting summary is complete and accurate. • Research is complete and understandable enough to allow the supervisor to respond to the call or letter.
Survey results (5%)	• Completed by the agreed-upon deadline.
Completed special projects (5%)	• Completed by the agreed-upon deadline. • Quality standards to be defined at the time of the project.

Principal Research Technician

Value-Added Results/Weights	Performance Standards
Mass spectrometric data packages (50%)	- No more than 6–10 data packages / year do not meet the following criteria due to Technician error: - Completed by agreed-upon deadline. - Chemist and customer are satisfied that: - Analysis was done using the proper technique. - Data was printed out in a form suitable for the customer's needs, and easily usable by the chemists doing the interpretation. - Data is generated on properly calibrated equipment. - Analysis are repeated or duplicated when required. - Log page contains all information regarding analysis conditions. - All lab notebook entries are present and in compliance with corporate guidelines. - Exceeds = Taking initiative to produce a useful result such as offering suggestions or data that weren't requested, or trying other alternatives when the initial approach didn't work. - Exceeds = No more than 3–5 data packages do not meet the above criteria.
Assistance to the Technology leader on research/development projects (15%) - Standards - Studies run on current techniques - Studies run on new techniques	- Technology leader is satisfied that: - The standard produces the expected results. - All agreed-upon pieces of information and calculations are recorded. - The standards are stored and labeled correctly. - Technology leader judges that the studies meet the same standards for data packages above.
Interpretation of mass spectral data	- Supervisor is satisfied that: - The interpretation is consistent with all data produced and all other known information about the sample. - Customer understands the interpretation.
Reports (5%)	Supervisor judges that the number of customer calls is acceptable (regarding clarity, understandability and timeliness of reports).
Equipment operating within specs (10%)	- Supervisor is satisfied that: - All maintenance is done according to schedule. - Calibrations are performed according to agreed-upon schedules and procedures. - Minor repairs are performed as needed and repair specialists are not called unnecessarily. - Repairs are accomplished without supervisor intervention.

Value-Added Results/Weights	Performance Standards
QLT Participation	• When the employee is a QLT participant, the QLT Leader is satisfied that the employee: • Volunteers solutions to problems. • Implements agreed-upon solutions. • When the employee is a QLT recorder, the QLT team is satisfied with: • The records are accurate. • The employee's staying in "recorder" role. • When the employee is a QLT facilitator, the QLT leader and team are satisfied with the employee's: • Stays in "facilitator role." • Ensuring that agenda and outcomes exist for all meetings. • Helping the team to achieve its meeting objectives.
Safety (5%) Safety • Incumbent acting safely • Safety inspections • Safety presentations	• Supervisor is satisfied that the Technician: • Uses protective equipment when called for. • Informs supervisor of hazardous situations. • Has no record able accidents. • Keeps all required safety training up-to-date. • Attends all safety meetings. • Produces accurate safety inspection findings. • Supervisor is satisfied that the findings of the safety inspections are accurate. • Supervisor believes that the audience was interested in the presentation based on watching the audience: • Add to the information presented or further clarify it. • Ask questions. • Say that the instructor seemed very interested in the topic presented.
General condition of the lab maintained (3%)	• Supervisor is satisfied that delays in lab work do not occur due to the following: • Supplies not being ordered. • Samples not being archived. • Column inventory not being maintained. • Samples not being logged in and out. • Laboratories not being kept neat (safety inspection citations).

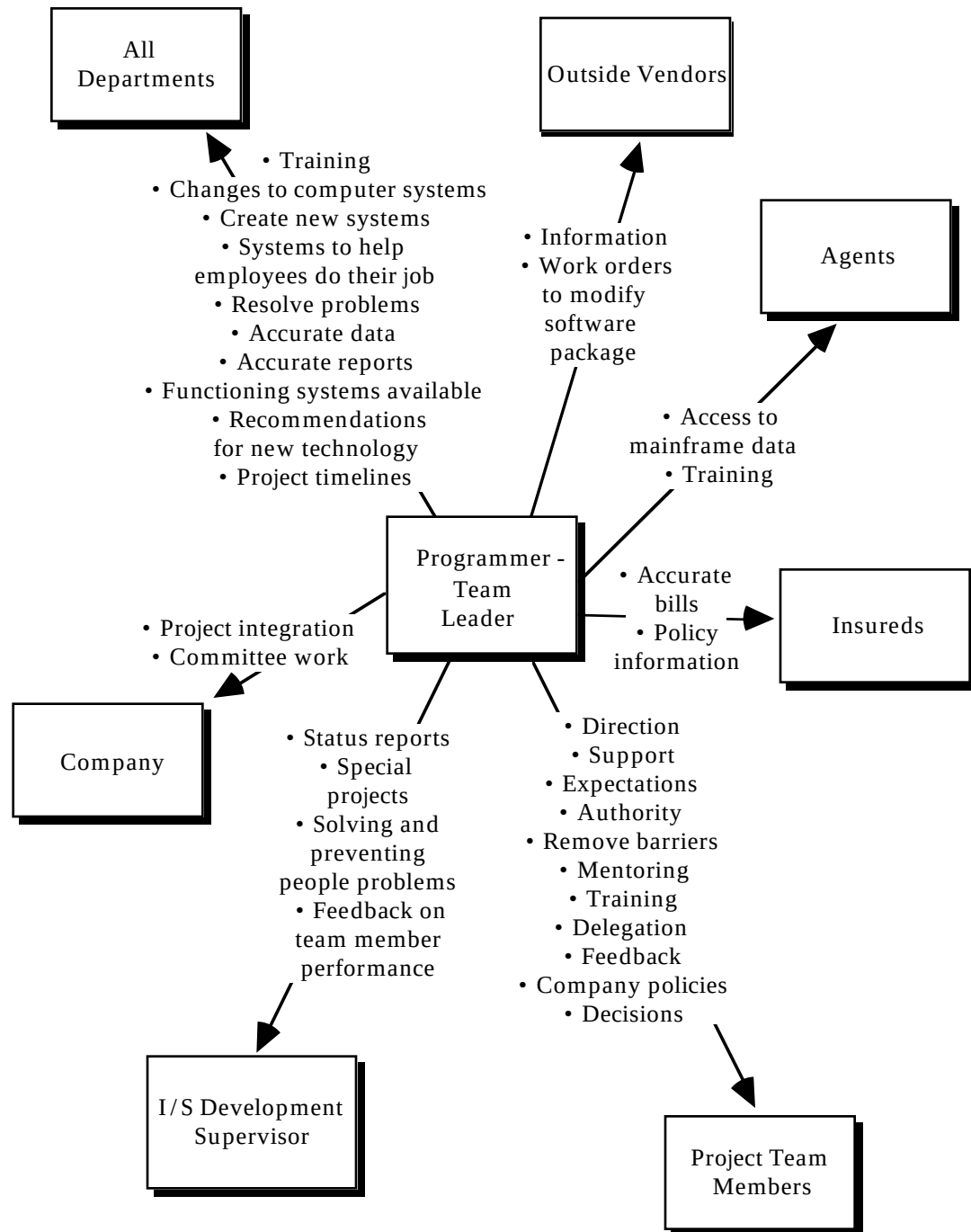
Process Development Engineer



Process Development Engineer

Value-Added Results/Weights	Performance Standards
Well characterized processes (40%)	- QA /Purification Manager and Project Manager are satisfied that: - The spec limits are set outside the process limits. - The process has been varied within spec windows and has not affected final product quality. - The process has been characterized to identify “plateaus” and “cliffs.” - The process characterization is completed ≤ 1 month before the beginning of phase 3 production. - The documentation and training have been completed ≤ 1 before the beginning of phase 3 production. - Exceeds = Process capability ≥ 1.0 and completed more than 1 month prior to phase 3 production.
Statistical data analysis techniques (20%) - Knowledgeable experimenters - Efficient process development	6–9 product recovery people are trained to the point that they can independently use the techniques on at least 1 experiment.
Databases (20%) - Project information - Process characterization information - Production information	- Manager is satisfied that: - All available data is entered. - Data is organized and is easily accessible. - Data entered in the spreadsheet is useful for process analysis. - Database is available for data entry before data is available.
Information summaries (10%) - Data sheets - Data summary - Memo about the data - Monthly reports - Notebooks	- No more than 2 inaccuracies / report. - No incomplete notebook entries. 1 report / month. - Manager is satisfied that: - Writing is logical, concise, accurate, and in a scientific / technical style. - Date is presented clearly and logically. - Conclusions reflect the data and known theory, and are stated clearly. - Anomalies are noted and discussed.
New methods for process development (10%) - Efficient process development group - Well characterized processes	1 new technique is introduced to the group each year. - The manager is satisfied that the new technique: - Allows the group to be more efficient, more cost-effective and /or more accurate. - Has been adequately tested and characterized so that implications of introduction are understood. - Is introduced with adequate explanation and training so that other group members can use it effectively. - Is well documented so that it remains useful after the introduction.

Programming Team Leader

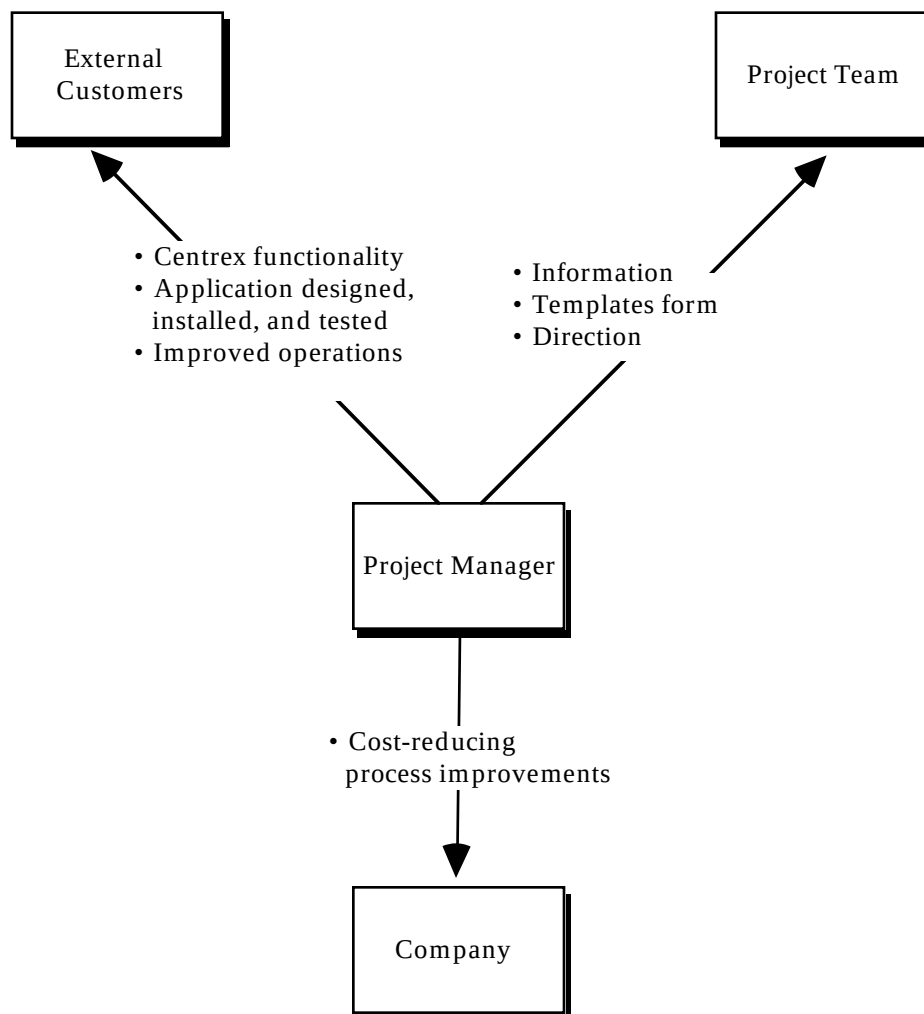


Programming Team Leader

Value-Added Results	Performance Standards
Computer systems to help people do their jobs • New systems • Enhanced / changed systems • Accurate and timely data	• No more than 5–10 problem reports during the first 8 weeks. • 95% transactions completed within 5 seconds (or agreed-upon standard). • (Shared with Systems) 2–5 hours of system downtime / month. • 98%–100% of days system is available between 7 a.m. and 9 p.m.. • Actual cost or time savings is within 90% of projected study results. • No more than 1 severe problem for a new system (e.g., many systems are brought down, work cannot continue, policies are updated incorrectly, or takes more than 50 person hours to correct). • Business partners are satisfied that: • System is being used. • Training is completed within the time agreed to. • System does what was agreed to. • Business partners and I/S peers are satisfied that the documentation is: • Being used as a training and troubleshooting tool. • Able to be used without users asking questions. • Organized so that users can find topics without asking the author. • Stored in the places specified in the department standards. • Consistent with the current version of the system. • Help function says how to fix the error without calling someone else. • Meet agreed-upon deadlines for all projects.
Business partners trained to use new systems	• All Regional Analysts are trained in the new system. • (Shared with Regional Analyst.) All users are trained. • (Shared with Regional Analyst.) No questions are asked of the help desk or no problem reports are submitted due to a lack of understanding of the system. • (Shared with Regional Analyst.) I/S Analyst says that the business partners are able to use the system as agreed to in the requirements document. • Training is delivered within the agreed-upon training period. • Training is completed within the projected person hours.
Recommendations for new technology implementation	• Committee or project team says the technical advice: • Helps them better define or solve the problem. • Is in time to be useful. • Is accurate. • Manager says the technical advice is consistent with the department's goals and standards. • Exceeds = Analyst is requested by name to give input.

Value-Added Results	Performance Standards
Resolved problem reports	• 90%–95% of problem reports are handled successfully (or no more than X–Y problem reports / year are not handled successfully): • Business partner agrees that the problem is fixed. • Solution doesn't cause new problems. • Problem is fixed the first time. • Solution doesn't affect system performance. • On large or complex problem reports: • Business partner agrees that the problem is fixed. • Solution doesn't cause new problems that could have reasonably been foreseen. • Solution doesn't affect system performance. • Problem is fixed within agreed-upon estimate of person hours. • Problem is fixed by agreed-upon deadline.
Satisfied business partners and agents	• Supervisor hears business partners saying: • The Team Leader takes the time to answer questions or finds the right person to answer the question. • The Team Leader asked for their opinions and used them (or explained why it was not possible to use their idea). • They were kept informed about the project status. • The Team Leader took their workloads into account when setting the project schedule. • They were educated by the Team Leader to be able to participate fully in the project meetings. • They were involved only when they needed to be. • The Team Leader knew when to involve resources outside the project team.
Productive project team	• The supervisor is satisfied that: • The team is meeting its deadlines. • The Team Leader identifies and tries to solve performance problems. • The Team Leader identifies team member training needs. • Surveyed team members say: • They know their assignments and deadlines. • They receive help when needed. • The Team Leader removes barriers to completing their assignments. • The Team Leader is available to answer questions. • Their good performances are acknowledged and appreciated. • They are provided the training needed to do their assignments. • They understand how their assignments fit into the team's project and understand how the team members fit together. • The Team Leader encourages team communication and unity.

Project Manager



Project Manager

Value-Added Results/Weights	Performance Standards
Satisfied customers (70%) - Fully functioning Centrex system - Positive image of Company	- Customer agrees that: - Originally negotiated contract terms were met. - The additions to contract improve productivity. - The application is functioning as promised. 95%–98% of all customer surveys rate the implementation activities as “satisfactory” or better. - Technical support, customer, other qualified users say they have access to project database containing sufficient information to complete their jobs. - No complaints are raised as a result of incomplete or inaccurate documentation. - Actual equipment-use costs are lower than anticipated due to Project Manager's innovations (varies by customer and project). - Sr. Project Manager agrees that any budget variance is justified. 100% milestone billing notification within 30 days of completion. 100% of applications installed and tested between Friday 5 p.m. and Monday 8 a.m. of agreed upon weekend. 95%–98% of programming problems identified through testing are resolved by Monday 8 a.m.. - Customer says they understand reasons for delays and changes to completion dates. 85%–90% of expedited equipment is received by negotiated earlier date. 95%–98% of all jobs are closed within 60 days of contracted completion. - Customer is satisfied that Project Manager obtained adequate support to solve problems and prevent delays. - Customer was informed of project details, issues and problems, and any customer concerns were heard and addressed.
More productive project team (25%)	- Project team members say: - They have the necessary information in time to be useful and have the authority to carry out their aspect of project. - Project Manager is willing to share information based on experience to enhance team productivity. - Project Manager, by example, encourages team members to do what they have to with no feeling of “That's not my job.” - Project Manager invites innovative ideas from all levels to improve deliverables to the customer.
Process improvements (5%)	One improvement / year that reduces cost.

Registered Nurse

Value-Added Results/Weights	Performance Standards
Patients who received all appropriate care as defined by the care team (shared result) (20%)	• No more than 3 falls/ 100 patients/ month. • No primary bacteria from an IV site. • No more than 1 level 2 or greater medication error per year. • Exceeds = Either no level 2 or greater, or reporting multiple level 1 errors. • 70%–85% of patients have their admission and assessment handled within 60 minutes. • 50%–60% patients are completed within the number of days defined in the Pathway. • No more than 40%–50% of patients are out-of-compliance with the Pathway or team-developed and family-agreed-to patient care plan.
Patient assessments (20%)	• Documentation of assessment is compliant within time stated in the policies. • Physician, manager or center resource person is satisfied that: • All patients are accurately and thoroughly assessed as /policy. • Appropriate actions are taken upon changes in patient status. • Changes are identified and assessed before a crisis occurs. • Exceeds = Handles crisis situations quickly and appropriately.
Educated patients and families (15%)	• Patient and family demonstrate knowledge of patient diagnosis, medications, and treatments they must administer. • Exceeds = RN receives unsolicited compliments from patient or family; manager says that the discharge instructions are very thorough.
Efficiently coordinated ancillary services (10%)	• No more than 20–30 missed visits/ month from unit-based specialists either due to the patient being off-unit or a conflicting treatment (shared with team).
Patient satisfaction (10%)	• x%–y% Patient satisfaction score on nursing care items (shared). • No more than 1 justified complaint /year from patients or families. • Patient / family says the following: (Data is collected from manager's observations and a quarterly interview of 5 patients: • The nurse introduced herself, explained all tests and procedures, and kept them informed about what was going on. • The nurse understands how they felt. • Patient received pain medication quickly. • The nurse respected privacy and confidentiality. • Exceeds = The nurse responded to patient's special needs; nurse received complimentary letters or gifts from patients.

Value-Added Results/Weights	Performance Standards
Effectively functioning team (shared result) (10%)	- Team members are satisfied that: - Team members volunteer to help when work is finished. - All of the team's assignments are completed by the end of the shift. - Nothing falls through the cracks because of poor shift-to-shift communication or an unread communication board. - Communication boards are up-to-date. - Exceeds = Team members resolve conflicts inside the team. - Exceeds = Members do what is asked without complaining. - Exceeds = Members provide public displays of appreciation for a job well done. - Manager and resource persons are satisfied that: - They don't hear of problems first from someone outside the team. - They are provided staffing schedules to solve anticipated problems. - Team members carry out tasks at the level of authority given to them. - Team members are able to leave on time. - Physicians are satisfied that: - Orders are carried out in a timely manner. - No justified complaints from patients or doctors. - They have complete and up-to-date patient data to alter patient care. - The team has coordinated hospital services to discharge the patient as soon as medically indicated.
Integrated care plan (10%)	- Manager is satisfied that: - Ideas that weren't created individually are created in interdisciplinary rounds. - Prioritized plans exist based on patient needs.
Physician satisfaction (5%) - Completed orders - Changes in patient status	- Physicians say that the nurse that the following data is collected twice a year by interviewing physicians during a routine contact: - Called them only when appropriate as soon as the patient status changed - Had all information they needed when asked. - Grouped routine calls to minimize number of calls during the night. - Exceeds = Physician initiates a complimentary letter or comment about a particular nurse (even in response to a general question).

Research and Development Director

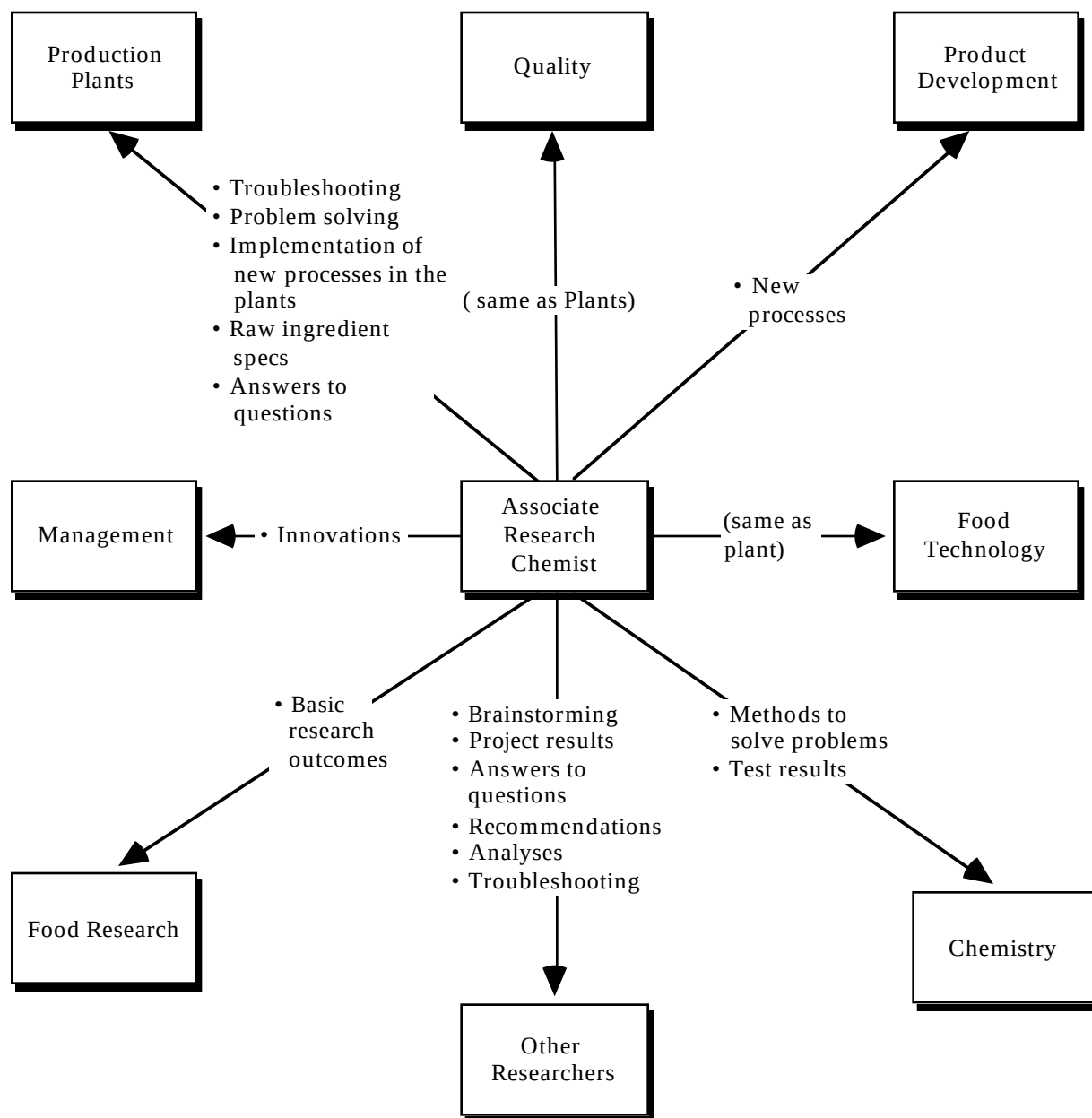
Value-Added Results	Performance Standards
Aligned department resources Mission, strategy and plans are established, communicated and understood by the organization	- General Manager agrees that: - Research Services mission is aligned to business needs, department missions exist and support Research Services mission. - Established strategies are likely to achieve the mission and are consistent with the corporate fiscal and human constraints and with Research Services values. - Capital, facilities, manpower and operating budget plans have buy-in by senior management, staff and customers.
Department organization - Physical assets - Realigned organizational structure - Integration and communication mechanisms - Budget decisions - Safe work environment - Quality process implementation	- General Manager is satisfied that the R&D Director has identified and prioritized needed physical assets and has presented clear, concise and timely justification to acquire these assets. - General Manager agrees that the organizational structure supports the plan to achieve the mission. (Any change fixes a problem or provides a new customer requested capability.) - General Manager agrees that organizational structure changes were correctly identified as the preferred solution to problems and the changes were effectively implemented. - General Manager agrees that critical integration opportunities are identified and integrating mechanisms (checklists, procedures, performance standards, etc.) are in place within R&D to provide synergy in attaining the Research Services mission. R&D employees understand their obligation to achieve the integration. - General Manager agrees that fiscal decisions were consistent with department strategies, driven by sound need, cost-effective and sensitive to the current economic environment.
	- Exceeds = No injuries. Meets+ = Minor first aid cases. Meets = Recordable injuries ≤ R&D injury rate. Below expectations = Recordable injuries > R&D injury rate. - No more than 15–20 safety inspection citations / month. - No repeat safety inspection citations. - General Manager is satisfied that safety concerns have been addressed.
	- General Manager is satisfied that: - The R&D Director is personally focused on being responsive to customer needs and creating continuous improvement, and has created subordinate performance measures that address these 2 factors. - The employees of R&D feel that the Director and R&D management value the quality process (i.e., that promotions, work assignments and recognition are based on demonstrating quality behaviors.).

Value-Added Results	Performance Standards
Productive human resources • Diverse work force • List of replacement employees for critical jobs • More knowledgeable and skilled employees • Recognition and rewards • Priorities and information • Provided performance feedback • Empowered employees • Career development information	• General Manager agrees that new employees make progress toward work force diversity goals (female, mid-level manager, minority mid-level managers and minority senior technologists). • Based on discussions with female and minority staff General Manager is satisfied that the R&D Director has provided a supportive work environment, recognizing the unique needs of a diverse work force. • General Manager agrees with the list of critical jobs. A back up person is either ready to step into each critical job, or the candidate is gaining skills, knowledge and experience toward being ready to step in. • General Manager is satisfied that R&D employee development plans are clearly linked to performance improvement needs, and that new skill development is driven by the employee's interest in a given area or the needs of the organization. • General Manager is satisfied that merit salary increases are differentiated based on performance (spread of increases between 2% and 12%). • Employees surveyed say : • They understand the Company's direction, department goals, their work unit goals and their role in achieving these goals. • They understand specifically what their supervisor expects of them. • They understand how well they are performing and where they need to improve. • Their performance review accurately reflects their performance. • Their concerns are heard and appropriate steps are taken to address them. • Their suggestions for improvements are expected and appreciated. • They have the authority to make decisions and take actions to achieve the department's mission and they understand the limits of that authority. • They have the necessary tools and facilities to accomplish their work. Where they do not have what they need, they understand why. • They have the skills and knowledge they need to do their job or a plan to obtain them. • Their good performances are acknowledged and appreciated. • Their supervisor knows their career interests. • They know the requirements for the positions they are preparing for. • Every employee receives a performance appraisal at least once every 12 months. • Every employee receives 2–3 interim reviews each year, and performance plan changes and performance problems are documented as needed.

Value-Added Results	Performance Standards
Productive human resources (cont'd)	General Manager is satisfied that special development plans exist for high performers, that corrective action plans exist for low performers and that progress is being made on these plans.
Critical decisions - Strategy decisions - Organizational structure decisions - Personnel decisions	- Following a review of past years' decisions and expected outcomes concerning strategy, organizational structure and personnel, General Manager is satisfied that the: - Success rate for the decisions was 60%–75%. - Overall impact of the decisions produced significantly positive results and reflected a good balance of risk and potential reward.
Analytical services - Routine and non-routine analysis - Methods - Solutions to problems - New technology introductions	- Customers say that: - All analytical requests were handled by the analytical technology centers (ATCs) either directly or through outside labs; or at the customer's request, the ATCs provided advice on where the work could be done. - They received the results by the agreed-upon completion date. - They were fully aware of the status of their work. - They were satisfied with the technical quality of the work. - General Manager agrees that the decisions to use internal vs. external resources to do analytical work maximized the value created by the ATCs. - General Manager agrees that the quality control standards are fully implemented and met and the round-robin and blind sample results are within the accepted standard deviations. - General Manager, consultants and senior technical staff say that the analytical capabilities are state-of-the-art in all analytical areas <i>currently</i> critical to strategic R&D programs. - General Manager is satisfied that the ATCs have recognized, planned for, and requested support to meet the <i>future</i> analytical needs of all strategic R&D programs.
Safety, environmental & toxicological services - Policies - Trained employees - Audits - Information to support line management in the achievement of safety goals and environmental accountability - Interface with local and regional agencies and professional organizations	- General Manager and Senior R&D Management are satisfied that: - Policies support compliance with regulations, promote a safe and healthful work environment, are uniform, clear and concise and are not considered trivial. - Training is responsive to government regulations, Company policy, employee interests and deficiencies in safety performance. Training is provided at a level consistent with the resources supported by the customers. - Safety audits are completed within agreed-upon time frames and person-hours of effort, and focus on the areas agreed to in the audit guidelines. - Line management received the manpower and expertise to help it achieve compliance with federal, state, and local regulations. The level of service is consistent with the resources supported by the customers. - Relationships with local and regional agencies are positive and constructive (and not confrontational or adversarial) as judged by the General Manager.

Value-Added Results	Performance Standards
Instrumentation and equipment services • Designs • Procurement decisions • Constructed and installed instruments and equipment • Repaired instruments and equipment • Functioning instruments and equipment	• General Manager agrees that using internal vs. external resources for instrumentation and equipment work maximize the value created by instrumentation department. • Customers surveyed say they are satisfied that the service provided met their needs, it was delivered on time and within budget and that opportunities to review their decisions occurred during the work. • General Manager is satisfied that the instrumentation department has acquired new customers by proactively identifying needs and applying its expertise to these needs. • Novel products are protected with patents that are not easily circumvented and can be reasonably policed, or the inventions are hidden so that they cannot be reproduced by a competitor.
Lab support services • Space allocation decisions • Maintained R&D buildings: • Maintenance and repairs • Renovations • Plans created for new facilities • Modifications to existing facilities • Waste management	• General Manager is satisfied that: • Space not being used for designed purposes is identified and alternative arrangements to maximize space utilization are offered. • R&D Directors say Lab Support Services is responsive to their space needs and offers creative solutions to meet these needs. • General Manager is satisfied that Lab Support Services takes initiative to keep the buildings functional and in good appearance, and to fix things before being asked or before a problem arises. • General Manager agrees that the plans for new facilities are based on updated manpower projections, functional needs of R&D, state-of-the-art technology in laboratory design and flexibility. • Customers surveyed say they are satisfied that the lab modifications met their needs, were delivered on time and within budget and that opportunities to review their decisions occurred during the work. • DER and EPA inspectors are satisfied that the waste management facilities comply with all applicable federal and state regulations. • Customers are satisfied that the facilities meet their needs and the people who manage the facilities are helpful.

Research Chemist



Research Chemist

Value-Added Results	Performance Standards
Basic research outcomes and innovations • Ingredient functionality • Components functionality • Process parameters • New methods developed • New technology introduced	• Research Manager is satisfied that: • The outcome is new to the industry, Company, or to this scientific area of the Company. • The outcome can be used to solve a problem in the industry. • The method produces replicable results. • The method measures what the customer is interested in. • The information produces a yes / no answer to the customer's question. • Someone on the research team agrees that the idea could be useful eventually, or there is data to support it's usefulness. • Customers are satisfied that: • They can use the idea to solve a problem. • It is easy to use. • Its cost is within their budget. • The value of the method is greater than the cost. • The information gives a yes / no answer to the customer's question. • Research Manager is satisfied that: • The research plan steps are completed on schedule. • The research direction changes appropriately based on the latest research results. • If it is a technology, the customer agrees that the projected return on investment is acceptable.
Documentation • Reports • Protocols • Log books	• Research Manager and customer are satisfied that: • Someone can reproduce the results by following the steps in the report. • The final report identifies who did the work and when and where the work was done. It also contains an objective, hypothesis, list of used equipment, findings, log book, recommendations and summary. • The final report is completed within 1 month or by the agreed-upon deadline. • The final report is sent to research committee and customers.
Technical information • Educated science and technology personnel	• Customer applies knowledge received in the training or presentation to solve its business problems. • Customer will be able to apply the knowledge to its business problems.

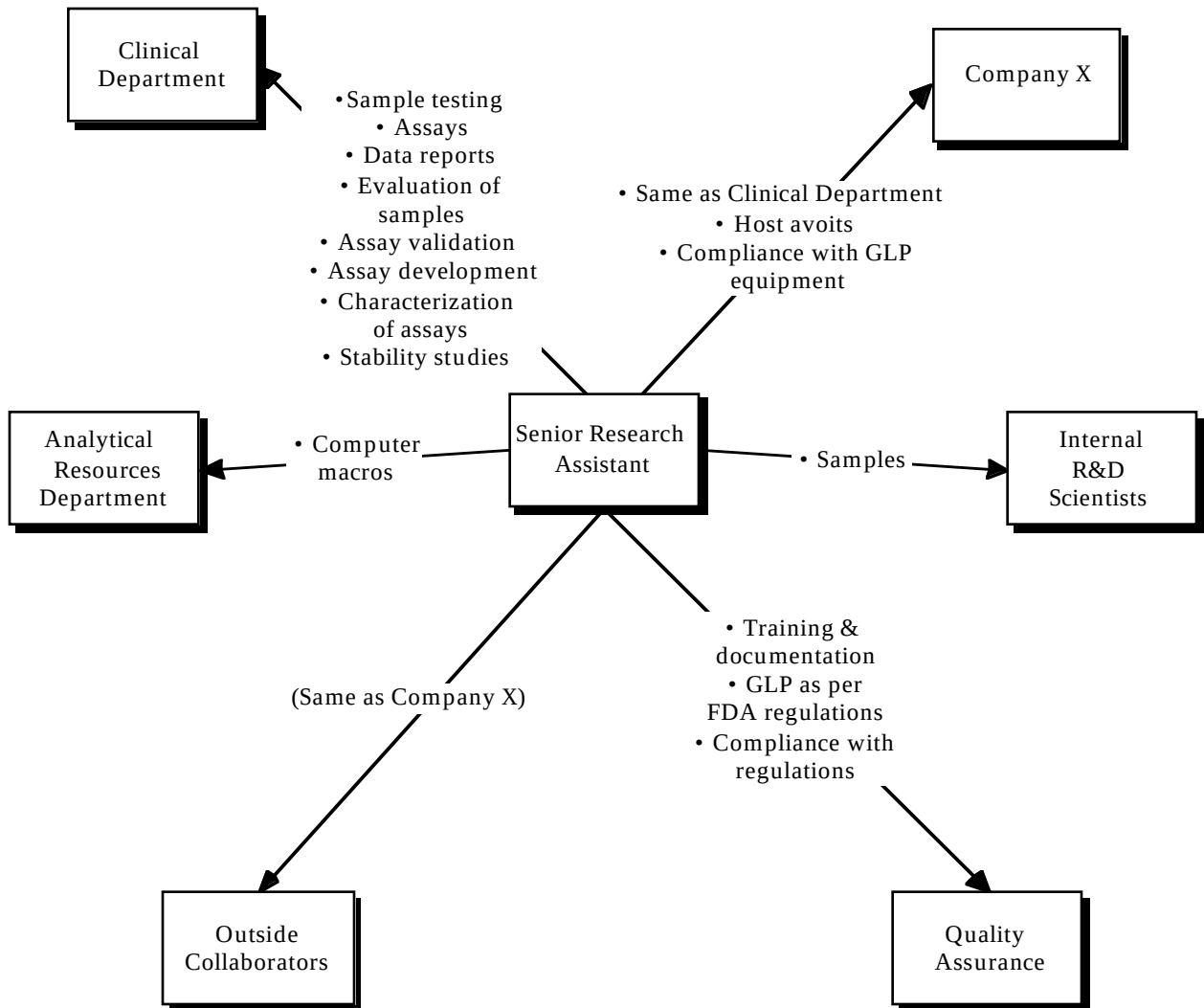
Value-Added Results	Performance Standards
New technology or knowledge implemented elsewhere in Company	• Research Manager is satisfied that: • The knowledge or technique introduced resulted in a better understanding of a food process, ability to control and measure quality, decreased process cycle time, or a cost savings for customers. • The knowledge or technique introduced added a food processing capability that didn't exist before, or a previous capability was refined. • The pay back time is reasonable given the cost of the technology introduction and actual usage level. • The process performs as projected. • A significant contribution is made taking into account the cost of the process, its perceived or dollar value and the amount of time spent on the contributions. • Customers say the Chemist suggests useful new technology or knowledge applications before they are specifically asked for and the customer agrees to implement the knowledge / technology.
Process or product characterizations • Analytical results • Product attributes • Process parameters • Product specifications	• Research Manager is satisfied that: • The process flow and problem were well defined, communicated and understood. • The outcome and conclusion were relevant to the process. • The characterization approach had a scientific basis. • The methods used were relevant and facilitated the process or product characterization. • The procedure or technology provided a yes / no answer to the customer's question. • The characterization was completed by the agreed-upon deadline. • The outcome was communicated to the customer in an appropriate format. • Customers are satisfied that: • They can use the information from the characterization. • They can understand and observe the results. • The cost is within their budget. • The procedure or technology provided a yes / no answer to their question.

Value-Added Results	Performance Standards
Analytical results and specs - Analytical results - Product specifications - Process parameters - Equipment specifications	- Research Manager is satisfied that: - The method measures the appropriate variable. - The results are relevant. - The method is scientifically sound. - Protocol is well-written. - The method is accurate, precise, reproducible, fast and cost-effective. - Customers are satisfied that: - They can understand and observe the results. - The cost is within their budget. - The information gives understandable answers to their questions. - The results relate to a variable of interest to them.
Solved customer problems - Solutions to problems - On-site problem analysis - Causative factors identified - Recommendations - Methods for solving problems	- Research Manager is satisfied that: - Reports and solutions address the question. - The assumptions or hypotheses are based on scientific principles. - The proposed solutions, suggestions and / or recommendations are understandable. - The recommendations were provided within the agreed-upon time frame. - Customers are satisfied that: - The report and any answers to address the question that was asked. - The proposed solutions, suggestions and / or recommendations are understandable. - The proposed recommendations were provided in time to be useful. - The solutions work, now and in the future. - The information gives understandable answers to their questions. - They are able to implement the recommendations.
Motivated and productive employees	- Manager is satisfied that: - Training requirements are met. - Discipline is provided fairly and consistently. - All employees understand the department's goals and how their performance affects these goals. - All employees understand how they're performing against their goals. - Employees are performing quality checks, correcting defects and producing quality product without being reminded. - Employees receive rewards for good performance. - Absenteeism is no more than 1%–1.5% - There are 0 accidents

Sales Representative

Value-Added Results/Weights	Performance Standards
Sales (60%) - Existing business - New business - R&D applications - New construction / industries - Competitors' business	\$1.4–1.6 million annual profit from current customers. \$.5–\$1 million annual value of new contracts with acceptable ROI and >12 month duration. # new contracts for R&D applications (to be agreed-upon).
Satisfied customers (30%) - Coordinated training and installation - Solutions to problems - Customers entertained - Customers able to maintain a safe work environment	90%-95% satisfied customers based on survey results. - All customers say that process is working as promised at 2 weeks after installation. - All customers say that safety training is what they agreed to.
Completed reports (5%) - Call reports - Contract agreement reports	- No more than 1 contract agreement report / year with errors or blanks spotted by district manager. - No more than 1 contract agreement report / year submitted more than 30 days after signing. - No call reports with competitive information > 60 days old.
Collection of overdue accounts (5%)	No outstanding balances more than 120 days old.

Senior Research Assistant



Senior Research Assistant

Value-Added Results/Weights	Performance Standards
Assay data reports (35%) • Excel sheets • Memo about the data • Data summaries • Completed sample paperwork • Notebooks • Quality assays	• No more than 2–5 data inaccuracies / report. • No more than 2 omissions in sample paperwork / report. • No incomplete notebook entries. • Correct samples are used based on the study protocol. • Manager is satisfied that: • Package contains a memo, data summary, Excel sheets, and sample paperwork. • Issues are noted and discussed. • Writing is logical, concise, accurate and in a scientific / technical style. • Excel sheets are grouped by patient number and group. • Samples are accurately labeled and organized for testing, there is an accurate and complete freezer check-in / check-out log, and samples spent minimal time in the thawed state. • The group knows who is doing each part of the testing. • Exceeds = Report contains interpretive insights. Complex reports require fewer than 2 rewrites. • Assigned deadline is met. • System suitability parameters are met. • Controls are within range. • Assays are performed according to standard operating procedures (SOP) and documented according to good laboratory practices (GLP). • 80%–90% of assay plates are successful. • Average of 4–6 microtiter plates / day.
Compliance with regulations (35%) • Successful audits	• No major out-of-compliance findings and 2–4 minor findings / year. • Manager and auditor are satisfied that the Assistant can explain the procedures. • All laboratory work is in compliance with A-305, D-006, A-150 and A-300.
Validated assays (15%) • Characterizations • Stability studies	• Manager is satisfied that: • The correct validation parameters are selected for the particular assay. • Assays produce the answers needed. • Assay design produces efficient data collection. • Issues are noted and discussed. • Writing is logical, concise, accurate and in a scientific / technical style. • Exceeds = 2 or fewer rewrites are required.

Value-Added Results/Weights	Performance Standards
New assays (10%)	• Manager is satisfied that the new assay: • Is appropriate for the sample type. • Can be validated. • Contains no unnecessary steps. • Exceeds = New assay is fully developed within 2 weeks.
Computer macros (5%)	Users are satisfied that the macro: • Analyzes data in right format. • Is easier to use than the previous version. • Is at least 90% faster than the manual procedure. • Can be validated. • Produces results that match the manual results. • Time saved using the macro exceeds the time it takes to learn it.

Senior Vice President—Chemicals

Value-Added Results	Performance Standards
Financial results	• \$X–\$Y million operating profit. • Z% return on asset capital employed (ROACE). • \$X–\$Y million cash flow. • \$X–\$Y million net cash flow. • % of dividends paid matches the 5-year plan. • % of earnings / share matches the 5-year plan.
Strategic plan	• CEO and Board are satisfied that the plan: • Is based on well developed assumptions with which they agree. • Covers a 5-year time frame and contains assumptions and implications that look forward 10 years. • Defines reasonable goals and business objectives which they agree with, and which are justified with data. • Actual implementation matches the plan. • If changes are required due to failed strategies, they are noticed and learned from early rather than after the Company has invested more money in the error. • Competitive pigment business placement: • Top 5: Market share in product A (within 3 years). • Top 4: margin / ton. • Top 3: fully allocated cost / ton. • Top 6: earnings quality / ton. • Better than peer companies on overhead / ton. • Cost structure is flat over 5 years on a constant dollar basis.
Effective restructuring	• Successful divestiture of Division A, Division B, and Division C. • Integration of Acquisition A into the Company. • New acquisition candidates are identified and analyzed. Approval is obtained to pursue the acquisitions. • CEO approves expansion alternatives. • Organization structure matches the new business profile.
Improved employee “bench depth” • General manager candidates • Acquisition experience	• X–Y higher than Grade 20 with at least 3 multiple discipline exposures (marketing, sales, business management, operations, administration). • X–Y employees with acquisition experience.
Consistent new corporate policies/practices	• New policies / practices are agreed to by all executives and are consistent unless the CEO finds a business reason for differentiation.
Changes to corporate culture • Diverse work force	• All officers agree to a measurable / verifiable definition of a “changed corporate culture” by 6/9X. • Baseline data for these measures is collected by 12/9X. • All officers agree to a measurable / verifiable definition of a “diverse work force” by 6/9X. • Baseline data for these measures is collected by 12/9X.

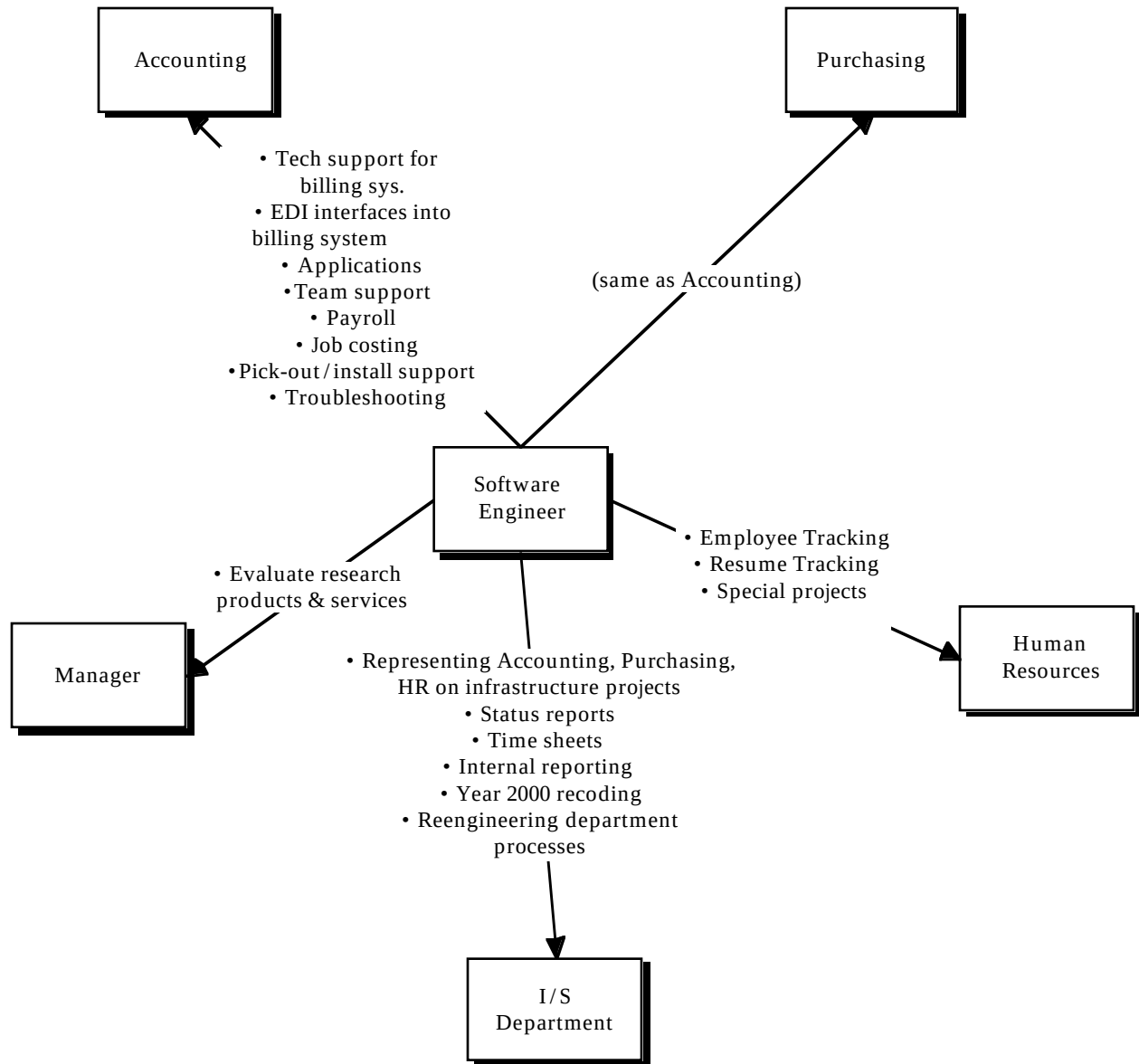
Value-Added Results	Performance Standards
Collaborative strategic decisions Investment options	- CEO is satisfied that input from relevant players was sought for all strategic decisions. - CEO is satisfied that: - Options exceed the cost of capital. - Options are within the strategic focus of the division. - Options represent a real addition to the value of the Company. - Strategic alliance partners add value to the Company over the long term. - The investment's actual performance matches the projected performance.
Motivated and productive employees	- CEO is satisfied that: - All employees have written performance standards. - All employees continuously know how they're doing compared to their standards. - All employees receive written documentation of their performance. - Employees offer alternative plans in response to negative results. - A reward and recognition system is being used. - Successes are celebrated. - Merit salary increases are differentiated based on performance. - Surveyed employees say: - They understand the Company's direction and department goals. - They understand their role in achieving these goals. - They understand specifically what their supervisor expects of them. - They continuously understand how well they are performing and where they need to improve. - They have the necessary tools and resources to accomplish their work. Where they do not have what they need, they understand why. - They have the skills and knowledge they need to do their jobs or a plan to obtain them. - Their good performances are acknowledged and appreciated.

Service Associate—Clinical Engineering (Biomedical)

Value-Added Results	Performance Standards	How Track
Properly working equipment - Completed repairs - Completed PMs	- Surveyed staff say: - Someone comes immediately when it is necessary. - If the person contacted can't come immediately, he / she finds someone else who can. - Routine repairs are done within the agreed-upon time frame. - They are kept informed if priorities change. - Manager is satisfied that the actual order of repairs completed matches their urgency and importance. - No more than 1–2 repeat visits / month (within 72 hours) for the same problem. - All PMs are completed within 30–60 days of assignment. - Exceeds = 70% within 30 days.	- Manager contacts a sample of 5 departments (person to be selected by employee) and asks about service levels. - Manager observation of a sample of priority decisions. - Manager reviews 1–2 weeks of work orders for repeats. - Call log. - Manager reviews list of PMs to do vs. PMs done.
Satisfied patients and staff	- Surveyed nurses in the area say: - Routine repairs are done within the agreed-upon time frame. - Technician explains how to prevent recurrence. - Technician introduces self to patients, asks the patient if he / she can come in. - Technician takes patient's needs into account while doing the work. - Exceeds = Manager is satisfied that technician is: - Following up with the department on severe / intermittent problems to see if the problem is resolved. - Offering to investigate it again before the department calls.	- Manager contacts a sample of 5 departments (person to be selected by employee) and asks about service levels. - Manager visits a sample of departments a week after work is done and asks questions.

Value-Added Results	Performance Standards	
Recommendations for purchasing new equipment	• Decision maker is satisfied that the Service Associate's recommendations: • Makes a decision. • Contains reasons for the decision supported by factual evidence. • Provides alternatives • Summarizes both pros and cons. • Predicts how equipment will perform and the actual experience matches the prediction (if equipment is purchased). • Exceeds = All possible questions are answered. • Recommendation is made by agreed-upon deadline.	• Manager checks with decision-maker on how good the evaluation was.

Software Engineer

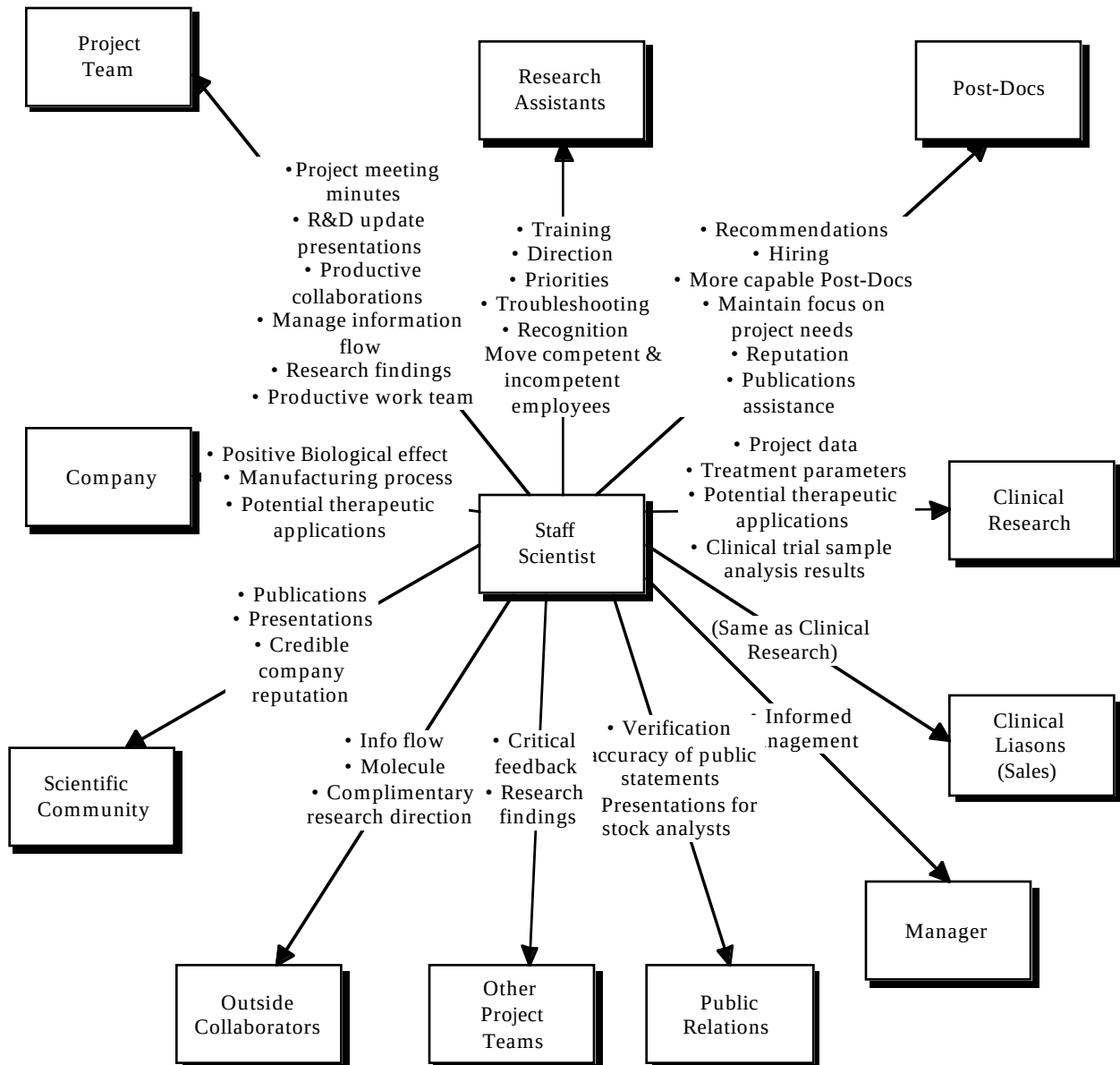


Software Engineer

Value-Added Results/Weights	Performance Standards
Functioning software systems (25%) - Billing System - EDI interfaces	0% unscheduled downtime within core business hours (shared with CS&T). - Response time: 3–7 seconds for inquiry screen updates, 1x to 4x accepted time for reports) (shared with CS&T). 90%–99% of bug fixes worked right the first time. - Acknowledged user's problem within 1 hour during core business hours. - Follow change control practices on all updates.
Payroll	0% unscheduled downtime within 72 hours of payroll cutoff (shared with CS&T). - Acknowledged user's problem within 1 hour during core business hours. - Follow change control practices on all updates.
Job costing	0% unscheduled downtime within 96 hours of payroll cutoff (shared with CS&T). - Response time: 10–20 seconds for inquiry screen updates) (shared with CS&T). 90%–99% of bug fixes worked right the first time. - Acknowledged user's problem within 1 hour during core business hours. - Follow change control practices on all updates.
- Employee tracking - Resume tracking	10%–20% unscheduled downtime within core business hours (shared with CS&T). - Acknowledged user's problem within 1 hour during core business hours. - Follow change control practices on all updates.
Databases with correct data (25%) - Data upload from distribution system - Contracts and pricing	No more than 1–2 events / year requiring backing out bad data from billing system's database.

Value-Added Results/Weights	Performance Standards
Technical recommendations for software applications or services (10%)	- Requester is satisfied that: - The engineer followed the agreed-upon methodology for the research. - The recommendation addresses all their requirements. - The recommendation fits requester's budget and goals, and the IS/ Corporate vision. - The cost/benefit ratio is favorable. - The solution is able to be integrated into the existing computing environment. - Completed by the agreed-upon deadline - Exceeds = The engineer provided additional relevant information which had not been requested, provided it before the deadline, and improved the presentation format from what was requested.
Enhancements to existing systems (20%)	- Enhancements are defect-free when installed. - Exceeds = Initiated an unasked-for enhancement or provided additional functionality in the same. - Completed by agreed-upon deadline.
Re engineered business processes (5%) - Problem definitions - Recommended improvements - Implemented changes - Improved business results	- Manager is satisfied that: - The data is reliable. - Resource requirements did not go up. - Costs did not increase. - The process can be re engineered without hurting other commitments. - The change fits with goals and vision of IS. - The change will have no negative effect on user. - The change produced a measurable improvement in the business process. - Exceeds = The engineer creates an unexpected cost savings or adds efficiency to other processes.
Completed special projects (5%) Year 2000 recoding	- Manager is satisfied that - All applications were addressed. - The desktop environment was addressed. - All vendors were contacted. - The solutions are appropriate for our industry. - More than 1 option was offered for implementation. - Recommended project plan by Q197.
Informed management (10%) - Project status reports - Time sheets	- No more than once a month the manager has to create the engineer's status report. - No errors in the status report or time sheets. - Doesn't cause the manager's report to be late.

Staff Scientist



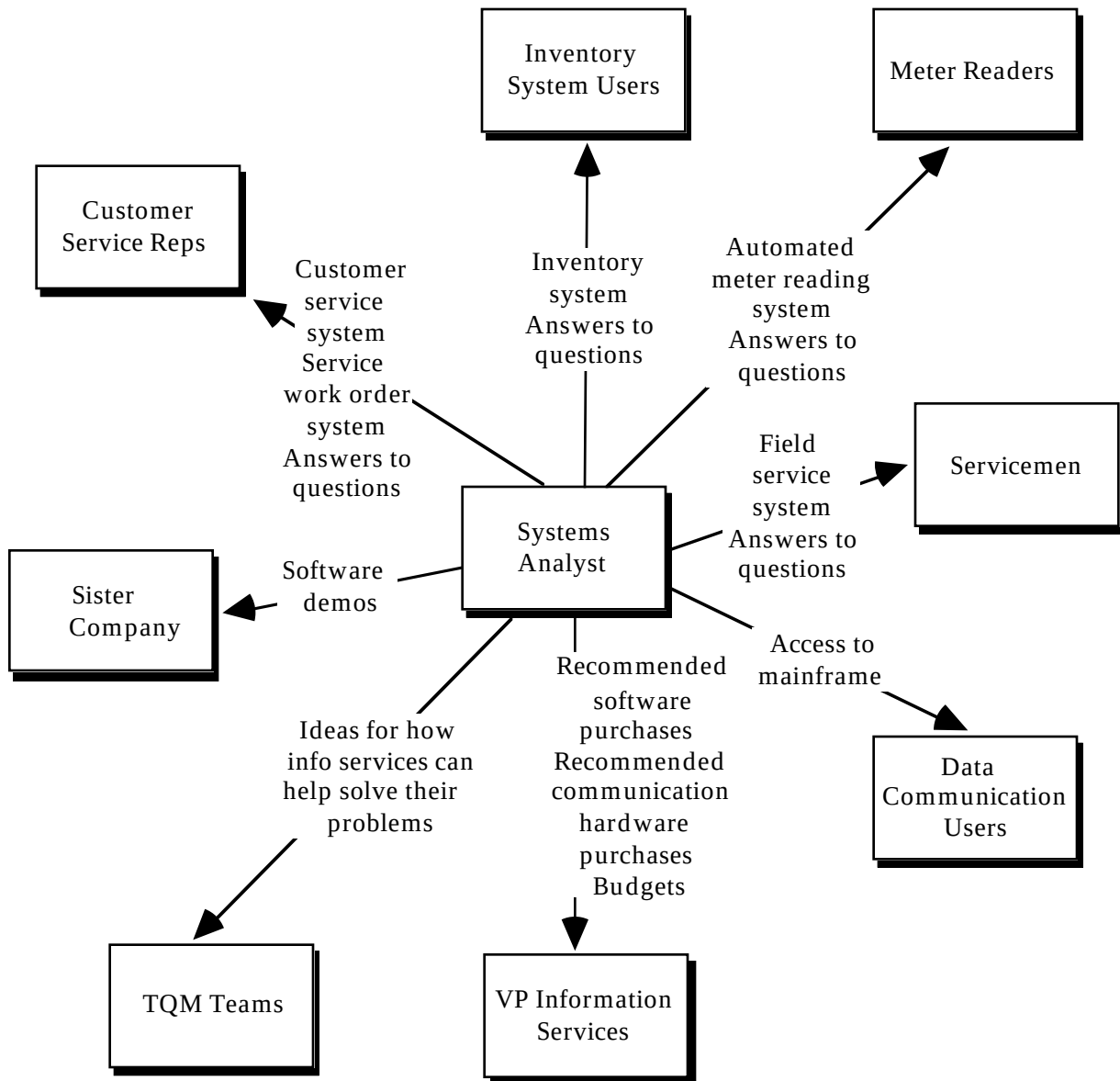
Staff Scientist

Value-Added Results/Weights	Performance Standards
Productive project team (Project Chair only) (25%) - Informed team members - Research designs	- R&D management is satisfied that: - The project team meets agreed-upon quarterly project goals. - The work is definitive, well controlled and the results are interpretable. - There isn't a more efficient research design isn't possible. - Scientific issues are addressed prior to R&D update meetings. - The members of the project team say: - They know what other team members are working on. - They see consistent progress toward project goals. - It's fun to work on this team. - Responsibilities are clear enough to avoid duplicating efforts.
Individual research findings (20%) - Own projects - Other project teams - Research designs	- Manager is satisfied that: - Experimental results are consistent, definitive and interpretable. - Findings are scientifically novel, suggest new areas to pursue, or identify a new application of a previous result. - Scientist identifies an area of clinical usefulness. - Results meet project team goals. - Exceeds = The research technique used is new. Technique or result is now used by other projects. Individual goals are exceeded. - Results are completed in time to support the project goals, or consistent progress is being made given the available resources. - Results are achieved without unnecessary expenses due to a lack of planning. - A more efficient research design wasn't possible. - The Scientist is able to effectively produce results on multiple simultaneous projects.
Cross-pollination of ideas (20%) - Project meeting minutes - R&D update presentations	- Scientific peers, manager and R&D management say that they understand what happened at the meeting without having been there. - Minutes are received within 2 weeks of the meeting date. - R&D management and other attendees are satisfied that: - A clear and concise description of project progress vs. project goals and a description of implications of the progress have been made. - The relevant scientific issues surrounding the project have been raised and discussed. - Focused future goals for the project have been clearly stated.

Value-Added Results/Weights	Performance Standards
Cross-pollination of ideas (cont'd) Productive external collaborations	- Manager and R&D management are satisfied that: - External collaborators have track record of producing results. - The collaborator group is recognized in the field, and has published in high-quality journals. - The collaborator group includes areas of both obvious biological applications and tangential fields that are likely to show some utility. - Experimental results are consistent, definitive and interpretable. - Collaborators identify an area of clinical usefulness. - Results meet project team goals. - Results are completed in time to support the project goals, or consistent progress is being made consistently given the available resources. - Exceeds = Findings are scientifically novel, suggest new areas to pursue, or identify a new application of a previous result.
Productive internal collaborations	- Manager and R&D management are satisfied that: - The internal collaborator group taps the Company expertise that is likely to show some utility. - Experimental results are consistent, definitive and interpretable. - Scientist identifies an area of clinical usefulness. - Results meet project team goals. - Results are completed in time to support the project goals, or consistent progress is being made given the available resources. - Exceeds = Findings are scientifically novel, suggest new areas to pursue, or identify a new application of a previous result.
Critical feedback to other project teams	- Project chairs and R&D management are satisfied that: - The project changes in some way based on feedback, or the direction of the project is now more clearly defined. - Feedback contains a new idea that the project team implements and the team sees how the project can be enhanced by the idea. - Feedback was received in time to be useful. - Exceeds = Feedback has a profound impact on the project's direction.
More competent and independent research assistants (10%)	- Manager and department peers are satisfied that research assistants are progressing in their skills (based on an agreed-upon development plan for a particular research assistant): - Able to discuss the experiments they are involved in, in a way which indicates they understand the experimental design . - Able to pull together information from different fields of literature to support the data they are presenting. - Able to present data in coherent fashion (understanding both the data and interpretation) - Less supervisor input is required for the nitty gritty parts of project

Value-Added Results/Weights	Performance Standards
Project data (10%) (Shared by entire project team) Potential therapeutic applications	- R&D Management is satisfied that: - The project team meets agreed-upon quarterly project goals. - The project team makes consistent progress toward defining or refining the potential therapeutic applications. - The work is definitive, well controlled and the results are interpretable. - A more efficient research design isn't possible. - Exceeds = Achieved more progress than listed in the project goals, or the results created a new spin off project team.
Contributions from post-docs (10%)	- Post doc develops a work plan and produces publications or presentations. - Post docs have defined an area of interest and are making progress in that area or Post docs have been integrated into a project team and are making fundamental contributions to that project's progress.
Credible The Company reputation in the scientific community (5%)	- Manager is satisfied that scientist has enhanced the Company's reputation by attending and presenting at high-profile scientific conferences. - Scientist has published their experimental results in high-profile scientific journals in a timely fashion. - Exceeds = Invited speaker at scientific conference and / or other scientific institutions.

Systems Analyst



Systems Analyst

Value-Added Results/Weights	Performance Standards
Application systems (30%) • Customer service system • Service work order system • Inventory system • Automated meter reading system • Field service system	• (Shared measure) 80%–95% of surveyed Company users say they are satisfied that: • System gives them the data they need to do their job. • System is easy to use. • Documentation provides clear answers to common questions. • They can find answers to common questions quickly and easily. • Changes are made to the system by the agreed-upon deadlines. • For system upgrades or additions, the agreed-upon objectives were met at initial implementation. • Company management is satisfied with consistency across Company: • Only 1 software system needs to be maintained / application. • No more than 2–3 field computers need to be maintained. • Projects meet agreed-upon person-hour goals.
Access to the mainframe (25%)	• Average 97%–98% uptime / quarter. • No more than 1 day / month / site when the system is down more than twice in 1 day. • Individuals experiencing downtime are reconnected during their initial call. • Districts are reconnected to the mainframe within an average of 2 hours.
Answers to users' questions (15%)	• 80%–95% of surveyed Company users say they are satisfied that: • They don't have to call more than once to get an answer to their question. • The answer is delivered when agreed upon.
Ideas for how Information Systems can help solve problems (15%)	• Users are satisfied that the ideas: • Solve their problem or meet their need. • Can be implemented at Company within a reasonable time frame and cost. • Are compatible with the current configuration. • Contain new technologies applicable to the problem. • Exceeds = Analyst initiates unasked-for solutions which the users agree to implement.

Value-Added Results/Weights	Performance Standards
Software and hardware recommendations(10%) Budgets	(Shared measure.) VP Information Systems is satisfied that: - All reasonable solutions were evaluated. - The long-term benefit outweighs the cost to purchase, train, maintain, etc. the purchase. - The purchase is compatible with current configuration. - The solution fits the need. - The solution helps Company users do something they couldn't do before, saves time or improves quality. - After purchase, the users are satisfied that the solution delivers what was promised. - Exceeds = Analyst initiates unasked-for solutions which the users agree to implement.
Software demos for sister company's customers (5%)	- The salesperson is satisfied that: - The functions demonstrated match the expressed needs of the customer. - No criticisms of the product or the Company are made in front of the customer. - The prospect is comfortable that the Company can meet their future needs to maintain and upgrade software. - Answers to prospect questions are in the prospect's language. - Exceeds = Prospect says they decided to buy based on the demo.

Training and Development Director

Value-Added Results/Weights	Performance Standards
Pool of capable managers who match Company needs (shared with Operations) (20%) - Competency and skill definitions - Assessment tools - Development resources	- Qualified candidate is identified 60%–75% of the time when an opening exists. The candidate: - Has a rating of 3.5 or higher in the competencies most important for the situation. - Is willing to work in the location. - Has a positive, 3-year performance trend. - Is recommended by the current manager for the position. - Candidates qualify as a Store Manager in an average of 1–3 years.
Useful Performance Management System (PMS) (20%)	- Senior managers say: - They have the data to pay employees for performance. - Their employees understand what results and skills are needed for a given position. - Individual performance plans support the business and contribution action plans. - Managers report that improvements in their contribution is due in part to the PMS. - Managers say that: - The new system is better than the current appraisal system. - The performance data is useful for promotion decisions. - They talk more with employees about performance than they did before. - The PMS helps to address performance problems directly. - Employees say that: - They talk more with their manager about performance than they did before. - They understand exactly what's expected of me. - They know how they're doing compared to the performance standards. - The appraisal is an accurate picture of their performance. - Divisions A, B and C are using the system by the end of 199X. 50% of corporate departments are using the system by end of 199X.

Value-Added Results/Weights	Performance Standards
Motivated and productive work group (20%) - Standards of performance - Priorities - Resources - Training - Coaching and feedback - Career development	- The HR Director is satisfied that: - All department employees have written performance standards. - All department employees know how they're doing compared with their standards. - All department employees are meeting their performance standards or there is a performance improvement plan in place. - All T&D employees receive an annual written performance appraisal. - A reward and recognition system is used within T&D. - T&D employee salary increases are differentiated based on performance. - Surveyed T&D employees say: - They understand Company priorities, T&D goals and their role in achieving these goals. - They understand specifically what their supervisor expects of them. - They understand how well they are performing and where they need to improve. - Their performance appraisal accurately reflects their performance. - They have the skills and knowledge they need to do their jobs, or a plan to obtain them. - Their good performances are acknowledged and appreciated.
Recommendations for performance improvement (15%)	Senior management says that the stores report that T&D helped them solve their performance problems in time to be useful.
Stores and departments who can train their own employees (15%) - Classroom training - Job aids - Trainer training - Category manager training	- Senior management is satisfied that the T&D Department provides courseware addressing priority /critical topic areas. - Divisions and corporate offices are able to deliver their own training as they need it.
Scholarship program administration (5%)	- Managers, schools and recipients say the process is easy to follow. - Employees and managers say the selection and renewal process and criteria are fair. - Some of the scholarship funds are reallocated to internal development.
Informed boss (5%)	- HR Director says he/she: - Hears about any problems first from the T&D Director (no surprises). - Is able to answer all questions about an agreed-upon list of "hot" projects.

Vice President—Human Resources

Value-Added Results	Performance Standards
Human resource strategy linked to business goals - Competent work force - Compensation policies and programs - Benefit programs - Qualified candidates - Personnel policies	- Strategic planning team says that: - HR policies and programs support the retention of employees. - The Company's HR policies are near the median of peer companies. - HR policies are designed to reinforce the majority of employees who do the right thing (and not the exceptions). - Programs and costs are consistent with the corporate values. - Programs or policies are initiated before they are demanded by a problem. - No material fines or lost lawsuits occur due to non-compliance with laws or regulations. - Policies and programs are supported by benchmark data. - Input was obtained from the divisions affected by the policy or decision. - Programs and policies are provided in time to support business goals. - Division vice presidents say that the HR programs and policies maintain or enhance employee productivity. - Managers say that the employees have the skills they need as their jobs change. - Company has a 90%–95% employee retention rate. - Benefits and compensation costs are no more than 7%–10% of earned premiums. - The Company's total compensation costs are near the median of peer companies.
Corporate changes - HR implications that support business changes - Implementation of the changes	- Officers say that: - HR made them aware of the human resource implications on business decisions. - HR provided alternatives that minimized problems and supported the business goals. - The information was received in time to be useful, or by agreed-upon deadline. - Corporate change is followed by a minimal number of requests for clarification or more information, or minimal complaints about how the change was made.
Competent management team - Identified backup pool for key positions - Management team ready to meet future business needs	- Hiring managers of the top 35 jobs are satisfied that they have a pool of candidates ready to move into the jobs within the agreed-upon time frame. - Line management says that the management team has the competencies they will need to meet future business goals. - Assessment data shows the competency gaps are being closed. - Hiring managers say that new hires have the potential to move into future management positions.

Value-Added Results	Performance Standards
HR implications of management decisions	- Officers say they are satisfied that: - No lawsuits due to non-compliance with laws or regulations are lost. - They understand what actions they can take that will be inconsistent with Company policy. - They were provided with alternatives that minimized the human resource problems related to their management decisions. - The strategic planning team is satisfied that HR approvals are consistent with company policy and past practices.
Motivated and productive HR team - Expectations - Feedback - Rewards and recognition - Salary decisions - Performance management - Priorities - Guidance - Training - Information	- The EVP administration is satisfied that: - All HR employees have written performance standards. - All HR employees know how they're doing compared with their standards. - All HR employees are meeting their performance standards or a performance improvement plan is in place. - All HR employees receive at least 1 interim review / year. - All HR employees receive an annual written performance appraisal. - A reward and recognition system is in place within HR and is used. - HR employee salary increases are differentiated based on performance. - Surveyed HR employees say: - They understand the Company's direction, department goals and their role in achieving these goals. - They understand specifically what their supervisor expects of them. - They understand how well they are performing and where they need to improve. - Their performance appraisal accurately reflects their performance. - They have the skills and knowledge they need to do their jobs, or a plan to obtain them. - Their good performances are acknowledged and appreciated.
Diverse work force	- The strategic planning team says that: - The employee population mirrors the demographics of the cities the Company operates in. - Women and minorities are represented in all levels of management. - HR policies and procedures support diversity, family friendliness and workplace flexibility.
Customer-focused work force - Links to performance management - Links to variable pay - Support for quality process	- Employees have customer satisfaction measures in their performance plans. - Employee variable pay is based partly on customer satisfaction measures.

(This page intentionally left blank)

JOB AIDS

How to Create Performance Plans

Step 1 **Review the organization's goals.**

Ask your manager for a copy of your organization's goals and manager's goals. Your manager will explain the goals and specify the ones to which you directly contribute. If your organization or manager's goals are not yet finalized, continue drafting your plan and revise it later.

Step 2 **Identify internal and external customers and the products and services each customer expects from the position.**

Draw a customer diagram for your position with a box for your job title, a box for each type of customer (both internal and external), and a list of products and services provided to each.

Step 3 **Identify the value-added results of the position.**

List the items on the customer diagram. Eliminate duplicates and items not worth measuring. Make certain each item you've listed is a value-added result, with a noun as the focus of the statement.

Turn any *services* into value-added results. To help identify the value-added result of a service, ask, "What is left behind when I go home at night after providing this service?" or "What products come from these actions?" or "What does my customer walk away with at the end of the service?" or "What is the organization really paying me to produce here?" The nouns that answer these questions are the value-added results of the services.

Add any results that support your organization's goals. For each organizational goal you can affect, ask yourself "What value-added results do I produce that can help the organization reach this goal?"

Make sure the results account for at least 80 percent of your job for the coming year.

Try to limit the number of results to five to nine. If you have more than nine results, shorten the list by combining some into *sub-results* of larger results.

Step 4 **Assign a weight to each result to communicate your view of the relative priorities.**

Distribute 100 percentage points across the results based upon the importance of each result to your organization. Weights are usually allocated in 5 percent increments. If you are using smaller increments, you may have too many results. After you finish assigning weights, make sure that the numbers reflect your feeling of the relative importance of each result.

Step 5 Develop measures for each result.

If any measure listed on your organization or manager's goals make senses as a measure for one of your value-added results, use it.

If a measure in one of the performance measurement examples makes sense for one of your value-added results, use it.

If you aren't satisfied with any of the existing measures, then:

For each result, determine which *general* measures (i.e., quantity, quality, cost, and timeliness) are important.

For each general measure, ask yourself, "How can I measure the (quantity, quality, cost, or timeliness)?"

If you can measure the result with numbers, write down the units to be counted or tracked.

If you can only describe the performance, write down who would judge the work and the factors to be evaluated.

Step 6 For each measure, create performance standards that describe both *meeting expectations* and *exceeding expectations*.

If the measure is:	Then:
Numeric	Ask , "How many am I expected to produce?" or "What level of performance must I achieve to help the organization achieve its goals?" Write the performance standard as a <i>range</i>, where the top of the range represents <i>exceeds</i> performance, and the bottom of the range is the point where management would say this is a problem worth discussing.
Descriptive	Ask "For each factor, what would the judge see that shows you have done a job that <i>meets expectations</i>?" "What would this judge <i>hear</i> your customers <i>saying</i> that means you have done a job that <i>meets expectations</i>?" List the judge, the factors, and what constitutes a <i>meets expectations</i> job for each factor. Repeat the process to define <i>exceeds expectations</i> performance. Write the description of <i>exceeds</i> performance beginning with "Exceeds = ..."

Step 7**Check the performance plan using the following guidelines.**

Does the list of results:

- Describe value-added end products, and not activities or categories? (Are nouns the focus of the results, rather than verbs?)
- Specify the critical results needed by the position's customers?
- Account for 80 percent or more of the job for the coming year?
- Contain no more than five to nine results?
- Have weights that describe the relative importance of each result?

Does each performance standard:

- Allow verification that the performance standard has been met? Can it be seen or can knowledgeable persons agree that the performance standard has been met?
- Appear to be achievable?
- Appear practical to track and monitor?
- Use a range when the measure is numeric?
- Have a judge, list of factors, and "meets expectations" for each factor when the measure is descriptive?
- Require perfection only when no errors can be tolerated?
- If achieved, have an impact on achieving the organization's goals?

Step 8**Create the tracking system.**

Decide how you will track the data to determine if the performance standards have been met. Answer the following questions to create and check the tracking system:

- What data needs to be collected?
- How much data will be collected? (include sample size if not collecting all data)
- When will the data be collected?
- Who will collect the data?
- Who will receive the data?
- Name of report (if one exists)?

Does the tracking plan:

- Address every measure on the performance plan?
- Have employees collecting the data wherever possible?
- Direct employees to collect data relevant to the performance standards?
- Direct employees to collect data as soon after the performance as possible?
- Look like the value of the data collected will be greater than the effort involved in collecting it?

Do the tracking reports :

- Use existing reports rather than create new ones?
- Use the fewest-possible pieces of paper?
- Allow the employees to compare the actual performance with the standard without looking back at the performance plan?
- Have room for comments to describe special circumstances?
- Appear practical to complete and use?

Dept. / Position

1

Page ____ of ____

[illegible]

INDEX

A

Access to the mainframe 152
accidents 135
Accomplishments
 Examples of 14
 Non-examples 13
Account memos 112
Account Service Administrator 69
Accuracy 83, 138
Accurate and timely data 122
Accurate point statements 115
Acquisition experience 140
Activities 12
actual vs. projected costs 95
Additional publication on performance measures 30
address changes 91
Administration and system maintenance 91
Administrative Assistant 71
Administrative Secretary—Legal Department 74
Advertising 25, 76, 78
Advertising message 78
Advice 57, 70, 81, 96, 103
Advice and options on design issues 78
Advocates 89
Age of carryover work 100
agreed-upon deadline 95, 112
Agreement processing 91
agreement records 91
Agreements 103
AIDS advocate liaison 89
Aligned department resources 128
Alignment of employees with company goals 96
Alternative ways of doing business 81
Analogies 95
Analyses 81
analysis 81
Analytical results 134, 135
Analytical results and specs 135
Analytical services 130
ancillary services 126
annual performance review 107
Anomalies 120
Answer the following questions about your customer
 diagram 10
Answers to health care providers' questions 100
Answers to questions 72, 115
Answers to users' questions 152
Application systems 152
arbitration information log 25, 76
Art Director 77
Assays
 data reports 138
 new 139
 plates 138
 quality 138
 validated 138
Assistance to the Technology leader on
 research/development projects 117
assumptions 135
Attendance 135
Auditing 130
Audits 130, 138
Automated meter reading system 152
Availability 57, 70
average score on final test 27

Avoiding surprises 79

B

Backlog 100
Backup supervisor 116
backups 92
Baseline data 140
Basic research outcomes and innovations 133
Benefit programs 156
billing notification 125
Billing System 145
Brochures 79
budget 27, 72, 79, 89, 98
Budget decisions 128
budget variance 125
Budgeting 128
Budgeting hours 78
Bug-free 27
Business Analyst—Finance 80
Business partners trained to use new systems 122
Business process evaluation 81
business process improvements 27, 146

C

Calendar 25, 44, 73, 75
Call log 104
Campaigns 89
Can Production Supervisor 82
CAPS 110
Career development 155
Career development information 129
case variance 83
case-holds/year 83
Cases 103
Causative factors identified 135
Change control 145
Changing the organization 128
characterizations 134, 138
Classroom training 155
Client and supervisor informed of project status 79
Clients 103
Closed and switches 112
Coaching 86, 155
collaborations 149
Collecting data
 Exceptions to employee collection 54
 How much to collect 52
 Methods of recording collected data 55
 Steps in collecting 50
 When to collect data 53
 Who should receive data 54
 Why the employee should do it 54
Commitment 135
committee work 100
Communicating across functions 128
Communication between packing and warehouse or
 food processing 83
Communications 72
Company X 89
Compensation Director 84, 85
Compensation policies and programs 156
Compensation system 85
Competence 107

- competencies 101
- competency database 101
- Competent work force 156
- complaint 112
- complaints 125
- Completed projects 98
- Completed special projects 96
- compliance 96, 103, 110, 113, 138
- Compliance with government regulations 98
- Components functionality 133
- Computer bugs 145
- Computer databases 112
- Computer End-User Services Manager 87
- Computer macros 139
- Computer system 100
- Computer systems to help people do their jobs 122
- Conducting analysis 130
- consistency 152
- Constructed and installed instruments and equipment 131
- Constructing 131
- Continuous improvement 83
- contract terms 125
- Contracts 89
- Cooperation 83
- Corporate business results 101
- Corporate changes 156
- Corporate Communication Consultant 88
- corporate culture 140
- corporate goals 101
- Corporate image 78
- corporate values 156
- Correctly set up new accounts 112
- correspondence 43, 75
- Cost 28, 146
 - how much, or cost limits the employee has to work within 26
- Cost estimates 95
- cost impacts 81
- Cost information / analysis 81
- Cost knowledge / analysis 81
- Cost saving 81
- Cost saving ideas 21
- Cost/benefit analysis 113
- Counseling 83
- Creating advertising 78
- Creating policies 130
- Creating promotional materials 79
- criticisms 153
- Cross-training 59
- customer complaints 112
- Customer diagram 6, 7, 8, 9, 19, 159
- Customer diagram exercise 11
- customer disputes 57
- customer disputes / 70
- Customer focus 91
- customer inquiries 91
- Customer needs 57, 70
- Customer satisfaction 57, 70, 78, 79, 100, 122, 125, 133
- Customer satisfaction survey 130
- Customer service system 152
- Customer Service—SAC 91
- Customer surveys 92
- Customer-focused work force 157

D

- Daily reports 95
- Data analysis 21, 25, 120
- Data reports 138
- Data summaries 138
- Data Systems Coordinator 92

- Database 108
- Databases 21, 25, 120, 145
- deadline 27, 72
- Deadlines 78, 79, 122
- Decision making 100, 131
- Decisions to refer 100
- delays 125
- Department organization 128
- Descriptive 160
- Descriptive measures
 - Example of 27
- design principles 94
- Design services 78
- Designer 93
- Designing 131
- Designs 81, 131
- Designs for capital improvements 98
- Development 81
- Direct mail 79
- Discipline 83, 135
- discrepancies 112
- Diverse work force 129, 140, 157
- Diversity 157
- documentation 122, 133, 152
- Documentation maintained 92
- Dollars of scrap per period 27
- Downtime 122, 145
- Drafted correspondence 25, 43, 75
- Drilling alternatives 95
- Drilling Engineer 95
- drilling problems 95
- Drug X 89
- Dry hole costs 95

E

- EDD data inquiries 96
- EDI interfaces 145
- Educated patients 126
- Educated science and technology personnel 133
- Education 72
- Efficiency 27
- Efficient process 21, 25, 120
- efficient research design wasn't 148
- Employee commitment 135
- Employee performance managed 135
- Employee Satisfaction Survey 60
- Employee survey 129
- Employee tracking 145
- employee tracking survey 60
- employee training 59
- Employment Supervisor 96
- Empowered employees 129
- Empowerment 129
- End results 12
- Engineer 97
- Enhanced computer systems 122
- Enhancements to existing systems 146
- Equipment 72
- Equipment operating within specs 117
- equipment purchase 143
- Equipment specifications 135
- equipment-use costs 125
- errors/quarter 112
- Exceeds 113
- Exceeds expectations
 - Example of
 - Recommendations for new technology implementation 122
- Exceeds standards
 - Example of 70
 - Advertising design 78

- Cost reduction ideas 81
- Drilling 95
- Giving design advice 78
- Improvements in work processes 83
- Logo design 79
- Motivating artists 78
- Promotional material design 79
- Recommendations 98
- Software demos 153
- Software recommendations 153
- Training 100
- Excel sheets 138
- Exceptions to immediate collection 53
- Expectations 135
- expedited equipment 125
- Experimenters 21, 25, 120
- Explanations of procedures 115

F

- Faxes 72
- Feedback 48, 129, 135
- Feedback report
 - Examples
 - Collection report 63
 - Summary graph 64
- Feedback Summary Table 61
- feedback to other projects 149
- Field service system 152
- Files maintained 92
- files/year are returned to the adjuster 100
- Filing 25, 44, 75
- final report 133
- Financial advice/solutions to strategic problems 81
- Financial results 140
- Financial status 72
- Flexibility 27
- flight schedule 44, 75
- Flyers 79
- follow-up 90
- food reviews 83
- Frequent 48
- functioning Centrex system 125
- Functioning software systems 145
- functioning team 127
- Functioning telecommunications system 57, 70
- Future usefulness 133

G-H

- General condition of the lab maintained 118
- General measures 160
 - Definition of 26
- Generating data 117
- Giving advice on design issues 78
- Goal
 - Evaluation criteria 46
- government affairs 76
- government affairs files 25
- Government officials 90
- Graphic arts vendors results 78
- Health Care Claims Processor 99, 100
- Help function 122
- Hiring 129
- hiring decisions 101
- Hiring supervisor 96
- hotel, car and flight information 44, 75
- HR databases 85
- HR implications of management decisions 157
- HR strategy linked to business goals 85, 156
- HR team 101, 157

- Human Resources Director 101
- Human Resources—Vice President 156
- hypotheses 135

I

- ID/Infections 89
- ideas 81, 152
- image of Company 125
- Immediate 48
- Implementation 81
- Implementation of the changes 156
- Improved financial systems 81
- Improvements to the work processes 83
- Individual research findings 148
- information 91
- Information summaries 21, 25, 120
- Information supporting business decisions 81
- Informed boss 155
- Informed directors 108
- Informed management 110, 146
- Informed manager 87
- Informed team members 148
- Ingredient functionality 133
- Initiative 152
- Innovation 133
- Inquiry screen updates 145
- Installation 57, 70
- installations 104
- Installing 131
- Instrumentation and equipment services 131
- Insureds satisfied 115
- Insureds who understand how benefits were allowed 100
- Integrated care plan 127
- Integration and communication mechanisms 128
- Interface 130
- Internet 89
- Interns 76
- Interpretation of mass spectral data 117
- interpretations 96
- Introducing new technology 130
- Inventory system 152
- Invited speaker 150
- ISO requirements 91
- Issues raised 90

J-K-L

- Job Aid
 - How to Create Performance Plans 159
- Job aids 155
- Job costing 145
- Job function alignment 86
- Judgment 100
- justified complaint 100
- justified complaints 27, 83, 100
- Keeping your supervisor informed 79
- labeling 25, 76
- Labor and Environmental 76
- Labor and environmental support 25
- labor hours 83
- Lawyer 102
- layouts 94
- Leads 57, 70
 - Converting 57, 70
- Learning goals 2
- Legal advice 103
- Legal and ethical representation 103
- Links to performance management 157
- List of replacement employees for critical jobs 129

Litigation 103
Log books 92, 133
Log info 83
Logical analyses 81
Logo designs 79

M

Macros 139
Mail 72
Mail distributed 25, 44, 76
Maintained R&D buildings 131
Maintaining 131
Maintaining equipment 117
Maintaining lab appearance 118
Maintenance 131
Maintenance Mechanic 104
Management 149
Management and supervisory training 108
Management development 107, 156
Management Development Manager 106
Management team 156
Manager results
 Sum of subordinates 130
Managing employees 83
Managing space 131
Managing vendors 78
Manual production data to computer center 83
Mass spectrometric data packages 117
Materials 83
Materials Director 109
Materials prepared / distributed 89, 90
Maximized value 110
Measures
 Definition of 26
 How to create 28
Mechanic 104
Media relations 89
medication error 126
Meeting attendance 116
Meeting needs 57, 70
meetings 44, 73, 75, 89, 90, 110
Meets expectations 39
Methods 130
Methods for solving problems 135
methods of development 101
Minutes 148
mission-critical positions 101
Modifications to existing facilities 131
Modifying existing reports 55
Modifying facilities 131
Monthly reports 120
More knowledgeable and skilled employees 129
More productive Director 72
More productive lawyer 75
More productive manager 25, 43
More productive project team 125
Motivated and productive employees 83, 87, 107, 141
Motivated and productive staff members 96

N

National and international advertising 78
Needs 57, 70
 needs identification 131
Negative feedback 48
Neonate 89
New Account Specialist 111
New accounts 112
New computer systems 122
New methods developed 133

new product development teams 113
New technology 122
New technology introductions 130, 133
Newsletter 72
Non-examples 13
Notebooks 120, 138
Nouns
 Examples in accomplishment statements 13, 14
Number of problem reports 122
Number of problems 122
Numeric 160

O

Obtaining resources 128
Offset history 95
on-line procedures 91
On-site problem analysis 135
Operations 72
operations improvement 98
order entry process 87
Organizational designs 86
Organizational Development—Senior Consultant 113
Organizational measures worksheet 4, 5
Organizational structure decisions 130
Organizational training plans 108
Organized files 25, 44, 75
Oriented interns 25, 76
OSHA 98
Outbound transmissions 112
Outliers 72
Outputs of the work 12
Overdue accounts collected 136
Overpayments 115

P

Packaging 79
packaging rate 27
paperwork 91
Parameters met 138
patents 131
patient admission 126
Patient assessments 126
patient care 126
patient diagnosis 126
Patient satisfaction 126
patient status 126
Pay and benefit information 96
Payroll 145
Payroll data 83
performance appraisal 107
performance appraisal reflects their performance. 87
Performance appraisal system 86
performance appraisal. 155
Performance assessment system (PAS) 86
Performance capabilities 81
Performance feedback provided 129
Performance goal 39
 How to create 39, 40
performance improvement 155
Performance management system 101, 107, 154
Performance plan
 Common problems and solutions 47
 Activities disguised as results. 47
 Descriptive standards lack a judge 47
 Goal can't be exceeded 47
 Goal happens many times/year 47
 Measures are impractical 47
 Measures are not verifiable 47

- Numeric performance standards lack a range. 47
- Specific measures don't match the general measures. 47
- Too many results. 47
- Wrong value-added results 47
- Evaluation criteria 46
- Steps to create 3
- Performance plan worksheet 33
- Performance standard
 - Example of for Distribution Manager 43
- Performance standards
 - How to create
 - Cost measures 39
 - Numeric measures 39
 - Performance Plan Worksheet 163
- Personnel decisions 130
- Personnel policies 156
- Phone messages 25, 72
- Physical assets 128
- Physician satisfaction 127
- Planning 131
- Plans created for new facilities 131
- Plates 138
- PMS 96
- Policies 130, 156
- Policies completed 115
- Policy 110
- Policy interpretations 85
- Policy making 130
- Policy processing 115
- Policy Processing Technician 114
- Positive feedback only 48
- post-docs 150
- Practice exercise
 - Value-added accomplishments 16
- pre-calls 91
- pre-existing condition 100
- Premium quotes 115
- Preparing standards 117
- Press releases 89
- Pricing 57, 70
- pricing communications 87
- Principal Research Technician 117
- Priorities 57, 70, 72, 155
- Priorities and information 129
- Prioritizing 129
- problem reports 122
- Problem solving 57, 70, 112, 130, 135
- Problems 112
- procedure 95
- Procedures 110
- Procedures for drilling and completions 95
- Procedures updated 92
- Process characterization information 21, 25, 120
- Process characterizations 134
- Process development 21, 25, 120
- Process Development Engineer 119
- Process improvement 110, 120
- Process improvements 125
- Process parameters 133, 134, 135
- Processed claims 100
- Processes 21, 25, 120
- Processing 91
- Procurement decisions 131
- Product approval 89
- Product attributes 134
- Product changes 83
- Product characterizations 134
- Product packaging 79
- Product specifications 134, 135
- Production 21, 25, 120
- Production goals 83
- Production information 83

- Production schedule 83
- production schedules 83
- Productive employees 96
- Productive project team 123, 148
- programming problems 125
- Programming Team Leader 121, 122
- Project completion 98
- project database 125
- project goals 89
- project information 21, 25, 120
- Project Manager 124
- Project meeting minutes 148
- Project status 79
- Projects 73
- Promoting 130
- Protocols 133
- Providing direction 128
- Purchases 110

Q

- QLT Participation 118
- Qualified candidates 156
- Quality 27, 28, 118
 - how well, accuracy, completeness, or originality 26
- Quality cases 83
- quality control standards 130
- Quality improvements 83
- Quality of advertising 78
- Quality of sales promotional materials 79
- quality process 157
- Quality process implementation 128
- Quantity 28
 - how many, rate, or volume 26
- Quarterly budget 72
- Questions answered 57
- Quotes 57, 70, 115

R

- R&D update presentations 148
- Re engineered 146
- re-invoicing 91
- Realigned organizational structure 128
- Recognition and rewards 129
- recognition system 107
- Recommendations 70, 135, 146
- Recommendations for new technology implementation 122
- Reductions in cost and revenue enhancements 81
- Referring 130
- Registered Nurse 126
- Regulations 103, 138
- regulatory agency inquiries 96
- Regulatory compliance 110
- Regulatory requirements 98
- Relevant 48
- renewal 91
- renewals 91
- Repaired instruments and equipment 131
- Repairing 131
- repairs 57, 70, 72, 104
- Repeat problems 112
- Replicability 133
- Report writing tool 110
- Reports 81, 90, 110, 117, 120, 133, 146
- Reports completed 136
- Representation 103
- reputation in the scientific community 150
- Research and Development Director 128
- Research Chemist 132

- Research designs 148
- Resolved complaints 115
- Resolved problem reports 123
- Resources 155
 - Additional publication on performance measures 30
 - Additional sources of measurement ideas 30
- Resources and tools 107
- response time 27
- restructuring 140
- Results 110
- Resume tracking 145
- revenue enhancement 81
- Reward systems 101
- Rewarding 129
- Rewards 86, 135
- Rewards and recognition 83
- Rework 81
- Robustness 27
- ROI
 - Analysis 81
- Routed calls 72
- Routine and non-routine analysis 130
- Rules
 - Deciding what data to collect 50, 51
 - When to collect data 53
 - Who should collect data 54
 - Who should receive feedback data 54
- Running studies 117

S

- Safe work environment 128
- safety 98, 130
- Sales 89
 - Technical support of 153
- Sales folders 79
- Sales generated 136
- Sales leads 57, 70
- Sales promotional materials 79
- Sales Representative 136
- Sample size 52
- Sampling data 52
- Satisfied
 - Clients 103
 - Manager 120, 138
 - officers 157
- Satisfied agents 100, 115
- Satisfied business partners and agents 123
- Satisfied Customer
 - Account Service Administrator 57, 70
- Satisfied customers 112, 125, 136
- Satisfied end users 87
- Satisfied insureds 115
- Satisfied patients 104, 142
- schedule delays 95
- Schedules 73, 79
- Scheduling 25, 44, 75
- Scholarship program 155
- Science education 89
- Self-sufficient 113
- Senior Research Assistant 137
- Senior Vice President—Chemicals 140
- Service Associate—Clinical Engineering 142
- Service work order system 152
- Shared standards
 - Examples of 112
- Skilled co-workers 104
- skilled employees 156
- Smooth operations 72
- Software and hardware recommendations 153
- Software demos 153

- Software Engineer 144
- Software solution 113
- Software systems 145
- Solutions to money problems 115
- solutions to problems 70, 83, 90, 96, 112, 130, 135
- Solved customer problems 135
- Solving problems 92
 - Programming 125
- SOP 110
- Sources of feedback 51
- Space allocation decisions 131
- Special projects 73, 89, 110, 146
- Specific 48
- Specific measures
 - Definition of 26
 - Examples of 27
- Specs
 - Limits 120
 - Windows 120
- Spending 72
- Spreadsheets 120
- Stability 138
- Stability studies 138
- Staff Scientist 147
- Staffing 101
- Standard
 - Referring to another document 130
- Standard legal documents 25, 43, 75
- Standards 117
- Standards of performance 155
- Statistical data analysis techniques 21, 25, 120
- Status report 90, 146
- Status updates 79
- Store Manager 154
- strategic decisions 141
- Strategic plan 140
- strategic team 113
- Strategy decisions 130
- Stretch standards
 - Example of 57
- Studies run on current techniques 117
- Studies run on new techniques 117
- Succession plan 113
- Succession planning 101, 113, 129
- Supervisory performance
 - Manager evaluation of 83
- Suppliers 110
- Supplies 72
- support 72
- Surprises 79
- Survey results 98, 116
- Surveyed agents 116
- Surveyed employees 107
- Synonyms
 - Value-added accomplishments 12
- System availability 122
- system downtime 122, 152
- system upgrades 152
- Systems Analyst 151
- Systems up and running 92

T

- Target savings 110
- Team goals 110
- Team leader 122
- Team Leadership 123
- Team measures
 - How to create them 30
- team or shared performance standard 30
- Team participation 81
- Team selling 153
- Technical information 133
- Technical support 57, 70, 146
- Technician 115
- Techniques 120
- Technology implementation 122, 134
- Technology transfer 134
- Test data 83
- Tested 120
- time savings 122
- Time sheets 116, 146
- Timeliness 28, 73, 89, 139
 - when, or deadline by which the result must be completed 26
- Timeliness of solutions 123
- Tracking 145
- Tracking report
 - Examples
 - Employee Feedback Survey 60
 - Summary table 59
 - Methods for creating reports 55
- Tracking system 48
 - Collecting data
 - How much to collect 52
 - Methods of recording collected data 55
 - Sources of feedback 51
 - Steps in collecting 50
 - What data to collect 50
 - When to collect data 53
 - Who should collect data 54
 - Who should receive data 54
 - Common problems and solutions 65
 - Measures are impractical 65
 - Importance of 49
 - Positive and negative feedback 48
 - Qualities of a good one 48
 - Subordinate
 - Evaluation criteria 65
 - Summarizing data
 - Example 61
 - When to summarize 59
- Trained agents 116
- Trained and confident team members 115
- Trained co-workers 57, 70, 100
- Trained employees 110, 113, 120, 130
- Trainer training 155
- training 27, 57, 70, 96, 100, 122, 129, 130, 133, 135, 155
- Training and Development Director 154
- Training opportunities 83
- Training plans for organization 108
- Transaction time 122
- transactions completed/ week 100
- Travel arrangements 25, 44, 73, 75
- Truth in advertising 78
- Turnaround time 122
- turnover 92
- Typed correspondence 25, 43, 75
 - Calendar 73
 - Schedules 73

U-V

- Upgrades 72
- uptime / quarter 152
- Usability 27
- Usefulness 133
- User's problems 145
- Using existing tracking reports 55
- Validity 133
- Value 81
- value-added 130
- Value-added results 12
 - definition 12
 - synonyms 12
- variable pay 157
- Vendor budgets 79
- Vendor costs 78
- Verification of totals and inbound transmissions 112

W-X-Y-Z

- Warehouse needs 83
- warranty 91
- Waste management 131
- Web site 89
- Weights
 - Definition of 24
 - Examples of 25
 - How to assign 24
- Well characterized processes 120
- Well-characterized processes 21, 25
- Well-written materials 90, 120
- Work assignments 86
- work flow 94
- Work schedule 95
- Writing reports 117
- Year 2000 146
- Yearly budget 72

ZPG FAXABLE ORDER FORM

Name		Title	
Organization			
Shipping Address (street address only; no PO boxes)			
City	State/Prov	Zip+4/Postal Code	Country
Phone (for questions about your order)	Fax	Email (name@company.com)	

Quan.	Title	Order Code	Unit Price	Total
	Performance Management Series (JZEP+JZTP+JZME)	JZPMS	\$240*	
	Employee Measurement Package (JZEP+JZME)	EMPK	\$170*	
	Team Measurement Package (JZTP+JZME)	TMPK	\$185*	
	How to Measure Employee Performance	JZEP	\$65	
	How to Measure Team Performance	JZTP	\$85	
	Performance Measurement Examples	JZME	\$150	
	Employee Performance Measurement Workbook	JZEPW	\$100	
	<i>Performance Measurement Example Collections:</i>			
	Corporate Services	PMCSV	\$150	
	Customer Support	PMCSP	\$100	
	Finance	PMFIN	\$100	
	Human Resources	PMHR	\$100	
	Information Services	PMIS	\$120	
	Operations	PMOP	\$120	
	Research and Development	PMRD	\$120	
	Retail Grocery	PMGRO	\$150	
	Biotech Drug Manufacturing	PMDRG	\$120	
	Advertising, Direct Marketing, Publishing	PMADV	\$120	
	Food and Beverage Manufacturing	PMFOD	\$100	
	Health Care	PMHC	\$100	
	Industrial Gas Manufacturing & Distribution	PMGAS	\$100	
	Insurance Industry	PMINS	\$100	
	Medical Instrument Manufacturer	PMMED	\$120	
	Oil Industry	PMOIL	\$100	
	Electrical / Water Utility	PMELE	\$100	

***Save 20% on these collections**

Order Total

Shipping and Handling UPS Ground (\$10 for first book, \$2 for each addl. book)

Call for overnight and 2-day air prices.

Prices and availability subject to change without notice.

Total

Payment: Charge my credit card: ☐ VISA ☐ MC ☐ AMEX Print Name on Card: _____

Card # _____ Exp. Date _____ Signature: _____

Satisfaction Guaranteed! All books come with a 14-day money-back guarantee.

To Order:	Fax: 610-891-9055	Call: 800-244-2892	Email: orders@zigonperf.com
Or Order Online with our secure server at http://www.zigonperf.com/store.html			