



# SETTING EXPECTATIONS

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## WHY ARE WE HERE?

My goals today are...

- to provide you with practical information or stimulate ideas which you can use to improve the work you perform in your job.
- to facilitate discussion between participants to learn or get ideas from others.

And your goals are...



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# AGENDA



- The importance of setting performance expectations
- Hopes and dreams...
- What is the difference between an expectation and a goal?
- Performance management
- It's all about communication
- Keys to success!

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# WHY IS IT IMPORTANT TO SET EXPECTATIONS?

Consider how an employee performs not knowing how they will be rewarded for their contributions.

- A few may over-achieve to get the most in anticipation of some reward
- Most will do what they think is expected
- Some will just do as they have in the past
- Some won't care



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## WISHES, HOPES AND DREAMS...

- “I wish he could be on time more often.”
- “I hope she can complete that project by the end of the day.”
- “It’s been my dream to expand the business by 50%.”



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## WHAT IS THE DIFFERENCE BETWEEN AN EXPECTATION AND A GOAL?

The definition of an expectation according to Webster’s dictionary is as follows:

*“The act or state of being expected; in expectation of what would happen. To consider probable or certain, to anticipate or look forward to the coming or occurrence of.”*



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## WHAT IS THE DIFFERENCE BETWEEN AN EXPECTATION AND A GOAL?

The definition of a goal according to Webster's dictionary is as follows:

*"The end toward which effort is directed."*



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## WHAT IS THE DIFFERENCE BETWEEN AN EXPECTATION AND A GOAL?



An expectation is necessary to maintain the status quo. If you are not meeting the expectation you are not doing the job. An acceptable level of job performance must include meeting or exceeding expectations. Meeting an established production quota is usually an expectation.

A goal is typically above and beyond an expectation. Workplace goals are common and employees are usually expected to strive to achieve goals. Goals are intended to challenge and stretch efforts.

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# PERFORMANCE MANAGEMENT



From a recent SHRM article on performance management:

*“For most organizations in the United States, performance reviews are used to support decisions related to training and career development, compensation, transfers, promotions, and reductions-in-force or employment termination. Generally, the performance review process includes setting clear and specific performance expectations for each employee and providing periodic informal and/or formal feedback.”*

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# PERFORMANCE MANAGEMENT

In addition to periodic performance reviews, performance management includes:

- Supervision
- Training
- Coaching/mentoring
- Performance Improvement Plan (PIP)
- Corrective action related to job performance or conduct



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# PERFORMANCE MANAGEMENT



Drilling down to performance standards...

Performance standards or expectations describe the acceptable level of job performance. They are job-specific and describe the specific indicators of success or desired outcomes for each job duty, responsibility, or skill.

**Define – Articulate – Communicate – Evaluate**

**Quantify – Qualify – Frequency – Timeliness**

**Specific – Measureable – Achievable – Observable**

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# PERFORMANCE MANAGEMENT

Typically the measure of success using performance standards includes a performance scale.

Performance Level	Descriptor
5	Outstanding
4	Exceeds Expectations
3	Meets Expectations
2	Needs Improvement
1	Unsatisfactory

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## PERFORMANCE MANAGEMENT

A word about Key Performance Indicators (KPI)...



A Key Performance Indicator is a measurable value that demonstrates how effectively a company is achieving key business objectives. Organizations use KPIs at multiple levels to evaluate their success at reaching targets. High-level KPIs may focus on the overall performance of the business, while low-level KPIs may focus on processes in departments such as sales, marketing, HR, support and others.

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## PERFORMANCE MANAGEMENT

Okay, are you ready? Let's put together a few performance standards beginning with the easy ones...



- Workplace rules – no fighting, no stealing, no drinking, etc.
- Attendance – onsite ready to work no more than five minutes after the start of shift. No more than four absences each year.

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## PERFORMANCE MANAGEMENT



Now let's get job specific...

**Job duty:** Follow blueprints and building plans to meet the needs of clients.

**Performance Standard:**

Demonstrates the ability to read and understand blueprints and building plans.

Consistently makes effort to understand client needs.

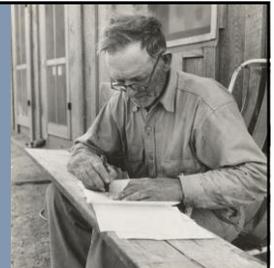
Demonstrates the ability to consistently meet client needs.

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## PERFORMANCE MANAGEMENT



Let's do another one...

**Job duty:** Measure, cut, and shape wood, plastic, and other materials.

**Performance Standard:**

Always measures materials accurately prior to cutting.

Work results in no more than 5% in waste material.

Demonstrates the knowledge and skill to operate tools safely.

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# PERFORMANCE MANAGEMENT

Let's do another one...

**Job duty:** Greets customers on the phone and in the office and provides requested information as needed.

**Performance Standard:**

Always treats customers in a friendly manner with zero complaints.

Effectively troubleshoots customer issues fairly and consistently.

Consistently provides accurate information and seeks additional information as needed.



# PERFORMANCE MANAGEMENT

Let's do another one...

**Job duty:** Enters daily production data into the computer.

**Performance Standard:**

Demonstrates exceptional computer skills and updates as needed.

Gathers daily production data and enters accurately by the end of each work day.

Ensures all data entered is accurate and complete.



## IT'S ALL ABOUT COMMUNICATION

Setting expectations starts on day one and should be maintained throughout the individual's employment.

- Onboarding aka new employee orientation
- Employee handbook – HR policies & procedures
- Job description
- Procedure manual - SOPs
- Management
- Supervisor
- Co-workers



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## KEYS TO SUCCESS!

- Review, plan, and take action
- Keep it simple; complexity breeds confusion
- Take the mystery out of management's expectations
- Communication is **critical** to your success



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# QUESTIONS AND ANSWERS



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## Word Choice Reference for Describing Performance

Good Performance	Poor Performance
<p><b>Quality of Work</b> Accurate, neat, attentive to detail, consistent, thorough, high standards, follows procedures.</p>	<p><b>Quality of Work</b> Increase in number of errors, lacks attention to detail, inconsistency in quality, not thorough, work often incomplete, diminished standards of work produced, does not follow procedures.</p>
<p><b>Dependability</b> Consistent attendance, punctuality, reliability, follows regulations completely.</p>	<p><b>Dependability</b> Absenteeism, multiple instances of unauthorized leave, excessive sick leave, frequent Monday and/or Friday absences, repeated absences.</p>
<p><b>Communication</b> Adept at oral and written communication, shares information with peers and supervisors, handles internal and external communications.</p>	<p><b>Communication</b> Diminished oral and written communication, misuses information for personal gain or to hurt others, tells peers and supervisors/managers too much or too little, misinterprets information received, covers up problems.</p>
<p><b>Internal/External Relationships</b> Agreeable constructive, flexible, helps without being asked, handles customers/vendors/outside, seeks and maintains good relationships, expedites orders and projects.</p>	<p><b>Internal/External Relationships</b> Disagreeable, openly mistrusts many people, edgy, easily and frequently angered and hurt, rigid, unable to work with others in new ways, deteriorating relationships with various contacts, overreacts to real or perceived criticisms, unstable relationships, blames others.</p>
<p><b>Judgment</b> Tactful, displays sensitivity common sense, maintains confidentiality, makes sound decisions, sizes up situations, take appropriate actions.</p>	<p><b>Judgment</b> Tactless, says things that hurt co-workers, clients or customers, does not use common sense, illogical reasons for behaviors, violates confidentiality, poor ability to size up situations, does not understand the whole picture, inattentive to safety procedures.</p>
<p><b>Organizational Abilities</b> Set realistic priorities, organizes time, set schedules, meets deadlines, completes projects on time, use time well, does not waste time, ability to coordinate with others.</p>	<p><b>Organizational Abilities</b> Sets unrealistic priorities, poor use of time, inefficient scheduling, missed deadlines, incomplete projects, inability to coordinate with others.</p>
<p><b>Volume of Work</b> Keeps up with work load, meets crash deadlines when necessary, steady, consistent, willing to put in extra effort.</p>	<p><b>Volume of Work</b> Overwhelmed by realistic workload, work piles up, makes commitments and does not meet them, unavailable for extra work, rigid, cannot increase workload when needed, volatile, easily upset, inconsistent pace of work.</p>
<p><b>Job Knowledge/Technical Skills</b> Knows what has to be done, seldom need instruction, proficient in all technical aspects of job, knows how to run equipment, able to work independently, able to instruct, guides and trains others, understands safety/security procedures and</p>	<p><b>Job Knowledge/Technical Skills</b> Doesn't know what has to be done, frequently needs instructions, not keeping pace with technical development of job, does not use equipment properly, unable to work independently, does not instruct, guide or train others.</p>

Good Performance	Poor Performance
maintains them.	
<p><b>Motivation</b> Genuine commitment to job, energetic, self-starting, takes initiative, shows enthusiasm, and high energy level.</p>	<p><b>Motivation</b> Lack of commitment to job, unconcerned with quality or product/service, disinterested in current assignments, frequent references to job dissatisfaction, low energy level, needs frequent prodding to initiate activities or complete tasks.</p>
<p><b>Reaction To Stress</b> Can be depended upon when deadlines pressures intensify, able to remain calm and effective despite irritation or changes in plans and policies, rarely loses temper, show good frustration tolerance, able to handle irate customers/vendors.</p>	<p><b>Reaction to Stress</b> Difficulty in concentration, increased accident rate on and off the job, becomes upset over minor irritations, frequent changes in plans, poorly controlled emotions, easily loses temper, yells, cries, withdraws.</p>
<p><b>Problem Solving</b> Troubleshoots, quick insight an able to learn, handles complex assignments, analytical, get to the point quickly.</p>	<p><b>Problem Solving</b> Does not recognize a problem exists, cannot define the problem, one track mind, most problems have the same few causes or solutions, blames others, covers up problems.</p>
<p><b>Creativity</b> Innovative, generates original solutions, develops new options, suggests improvements, willing to try new concepts.</p>	<p><b>Creativity</b> Focuses on negatives, easily dismisses/discounts new ideas, unwilling to try new ideas, habitual thought and behavior, offers same solutions for all problems, fears risk, need constant supervision and reassurance, over reliance on structure, does not question, unable to determine new options.</p>
<p><b>Decisiveness</b> Willingness to make decisions, makes appropriate decisions, ask questions when needed.</p>	<p><b>Decisiveness</b> Unwillingness to make decisions, asks too many people for advice, tries to solve a problem without thinking it through, acts impulsively.</p>
<p><b>Hygiene</b> Clothing appropriate to work (i.e., uniform, work clothes), comes to work clean, no offensive odors, appears healthy and clear-eyed, not flush or pale, is alert.</p>	<p><b>Hygiene</b> Inappropriate clothing (i.e., too casual or too formal), sexually inappropriate, appears unclean/unwashed, offensive odors, appears ill, flushed or pale, has glazed or bloodshot eyes, not alert, inattentive.</p>

## Action Descriptor Words

Setting Expectations seminar - NPCA

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Always	Increase
Consistently	Decrease
Frequently	Expand
Seldom	Contract
Never	Shrink
100% of the time	Raise
Immediately	Lower
Continually	Exceeds
Demonstrates	Slash
Understands	Reduce
Produces	Drop
Effectively	Diminish
Accurately	Minimize
Clearly	Cut
Calmly	Trim
Carefully	Lessen
Confidently	Curtail
Cautiously	Successfully
Generate	Improve
Enhance	Save
Eliminate	Consolidate