



Effectively Managing Employees



with Jeremy Hay @  Turnip Talent



Hello! – About Me

Hello! I'm Jeremy. 🙋

Over 12 years of experience in HR and Recruiting. Started my career in agency recruiting, moved in-house as a People Person (HR + TA), and then helped multiple tech companies establish their People function, hire awesome talent, and scale everything across people, platforms, and process.

A few facts about myself:

- 🏠 = Atlanta, GA.
- Born in Germany. Also spent ~ 4 years in Italy as a kid.
- Started Turnip Talent in 2022. We recruit top talent, train managers, and help orgs build performance-driven cultures.



- 1 Management vs. Leadership
- 2 Onboarding
- 3 One-on-Ones
- 4 Performance Reviews
- 5 Career Pathing
- 6 Importance of Manager Training
- 7 Q&A





Management vs. Leadership

Management & Leadership

What's the difference between management and leadership?

Leadership

The **art** of motivating a group of people towards achieving a common goal. Leadership focuses on...

- Vision
- Influence
- Inspiration
- Driving the strategic direction.

Management

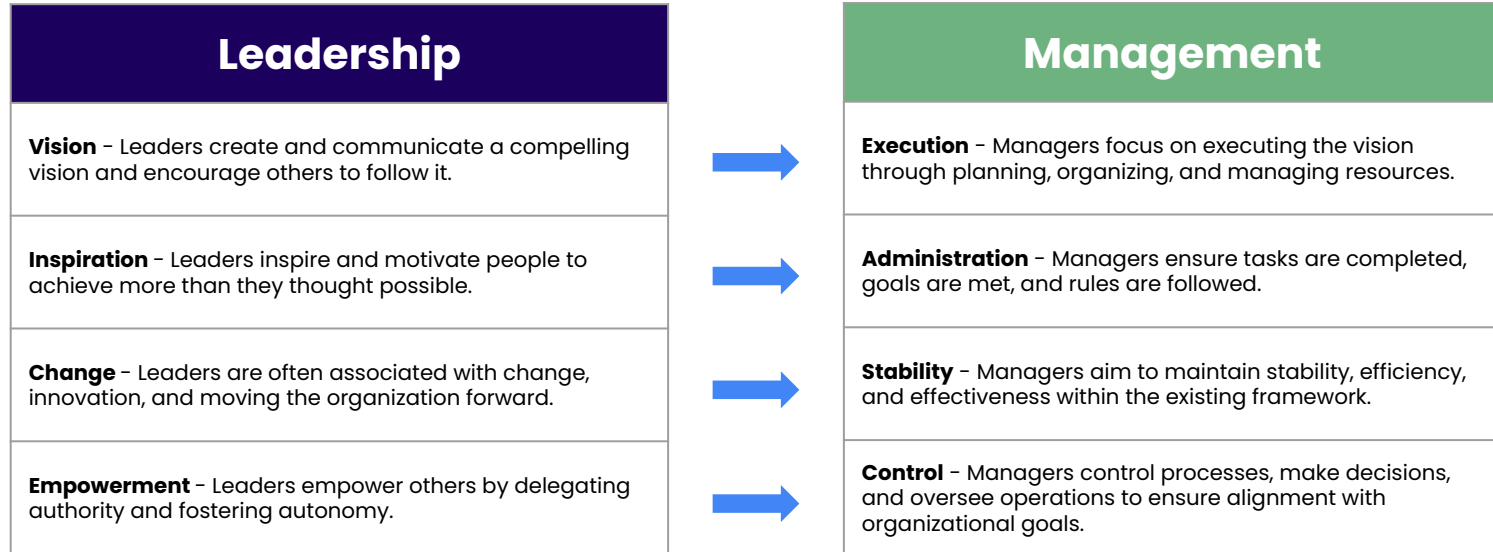
The **science** of planning, organizing, and executing tasks with a team to achieve specific objectives. Management emphasizes...

- Controls
- Processes
- Systems & Data
- Cadence



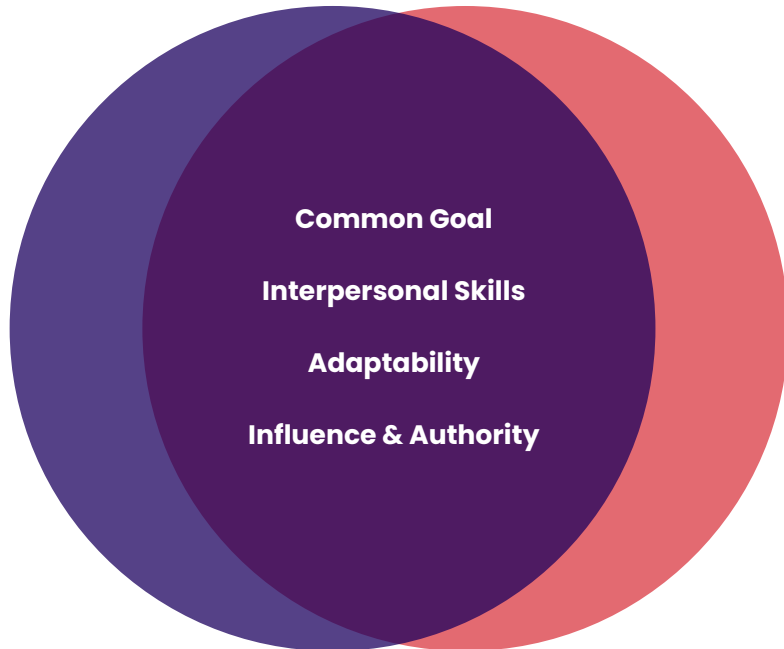
Management & Leadership

Let's break these down further.



Management & Leadership

Let's talk about the overlap.



Common Goal - Both aim to achieve organizational success. Effective leaders and managers must align their efforts towards the organization's objectives.

Interpersonal Skills - Effective communication, decision-making, and problem-solving are essential for both roles. Leadership and management require the ability to work with and through others.

Adaptability - Both leaders and managers must be adaptable to change and their ability to respond to evolving circumstances is crucial.

Influence & Authority - Leaders and managers both wield influence and authority. Leaders often influence through charisma and vision, while managers exercise authority through their formal roles and responsibilities.



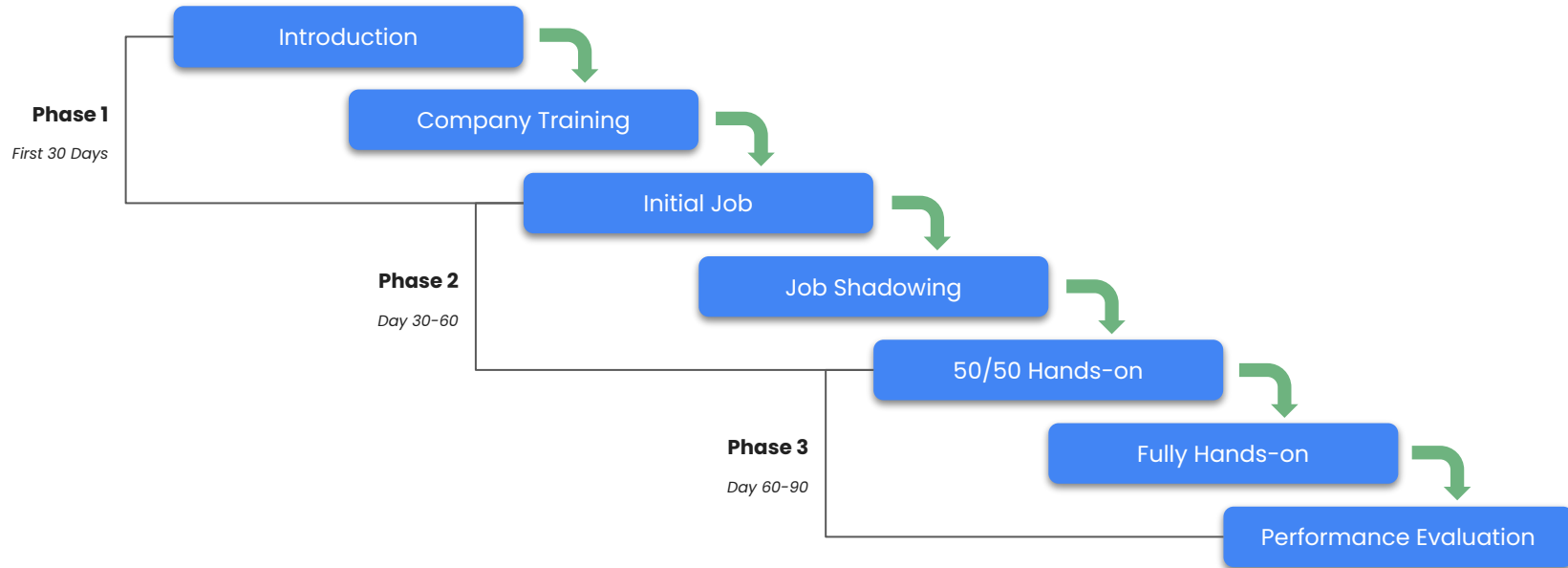
Onboarding



The best product companies focus on their “why” before diving into their “what” and “how” of what they do.

Your onboarding program should follow the same order!

Effective Onboarding Program Architecture:



Timeline – Phases

Phase 0	Phase 1				Phase 2	Phase 3	90-day Assessment
<i>Pre-Start Onboarding</i> <i>Before starting</i>	<i>Welcome to the team!</i> <i>Day 1</i>	<i>Your Why, What, and How</i> <i>By Day 8</i>	<i>Job-specific Intro</i> <i>By Day 15</i>	<i>Job Shadow</i> <i>By Day 29</i>	<i>50/50 Hands-on</i> <i>By Day 57</i>	<i>Fully Hands-on</i> <i>By Day 85</i>	<i>Assessment</i> <i>Before Day 90</i>
Congrats & Setup Onboarding paperwork and setup, congratulations email	Intro to Company Orientation, introduction, & expectations	Your Why, What, and How. Company training (history, departments, product, and client lifecycle)	Intro to their role. Job-specific intro training	How <u>others</u> do the role. Job shadow their onboarding partner	How <u>they</u> do the role. 50/50 shadowing and hands-on work	How <u>they</u> do the role, <i>really well</i>. Fully hands-on work	Assessment. Conduct a performance assessment, give feedback, and set goals for growth.

Note: This is a suggested timeline. It can be condensed for more experienced hires. All days are listed in calendar days, not business days.



Best Practices:



Involve your team:

- Don't have content? Crowdsource it! Your team is a wealth of knowledge.
- Challenge your team to refine your onboarding checklist.



Assign every new hire an Onboarding Partner:

- Choose a peer on the team in similar or same position to be their Training Partner throughout the program. They will be responsible for ensuring the new hire completes their training on a day-to-day basis by having the new hire shadow them, ask questions, and share ideas.
- The best Onboarding Partner options are those within the upper and right portions of your 9-Box to be an Onboarding Partner. This is their opportunity to learn how to manage!



Best Practices:



Continually manage and assess performance:

- Make sure to provide real-time, constructive performance feedback from the get-go.
- Schedule your weekly one-on-ones and first-month midweek check-ins on their first day of work to begin building a relationship of trust and transparency.



Listen to their ideas:

- We are often most perceptive of where to improve in the beginning stages of a job. Feedback from new hires on how to improve the onboarding experience or existing processes is invaluable. Ask for it!



Best Practices:



Building Phases – When designing phases, answer the following three questions:

1. What should they know by the end of this phase?
2. What should they be skilled in by the end of this phase?
3. What tasks, projects, and/or KPIs should they have reached or completed by the end of this phase?



Make it fun!

- New hires want to build great relationships with their colleagues and enjoy the journey. Plan a team outing, digital get-together, or other fun team building event to build camaraderie.





One on Ones

What is the impact of holding regular 1:1s across a company?

Some Interesting Stats

- Employees of managers who do not hold 1:1 meetings are **4x** more likely to be **disengaged** compared to employees of managers that do hold 1:1 meetings.
- Employees who work for a manager who helps them set performance goals are **17x** more likely to be **engaged** than disengaged.
- Companies with high levels of employee engagement experience **22% higher profitability** and **21% higher productivity** compared with workgroups with low levels of engagement.
- Companies with high levels of employee engagement experience **65% lower turnover** and **10% higher customer ratings** than workgroups with low engagement.

Source: <https://news.gallup.com/businessjournal/174197/managers-focus-performance-engagement.aspx>



Key Results – One on Ones

What is the purpose of holding manager–employee 1:1s?



Alignment & Productivity

Regular 1:1s help ensure individual activity and goals are aligned with overall company objectives. You're productive in the right places.



Performance Enhancement

Regular 1:1s provide a structured opportunity to continually discuss performance and personal development goals. This helps employees regularly iterate, pivot, and improve.



Rapid Problem Solving

Regular 1:1s allow managers and employees to quickly address roadblocks and deliver feedback in real-time, preventing individual and/or team-wide mole hills from becoming insurmountable mountains.



Engagement & Trust

Consistent, dedicated time for one-on-ones helps build stronger, more trusting relationships between managers and their employees. This increases employee retention.



Best Practices – One on Ones

What are the keys to running effective 1:1s?

For Managers

Preparation - Establish your agenda (i.e. 5-step flow) so that employees know what to discuss each week. Also, bring any relevant weekly KPI, goals, or other data to the meeting.

Foster Focus - Phones down, heads up, cameras on. Want to promote a culture of focus and active listening? Practice what you preach right in your one-on-ones!

Document - Either use a performance tool for one-on-ones (i.e. Lattice or 15Five) or build your own form to document each one-on-one. This is awesome reference material!

360 Feedback - The one-on-one is the best opportunity to address performance concerns in real-time. Be specific, be intentional, be constructive, and be solutions-oriented.

Actions & Recap - Recap the action items you set last week in the one-on-one. Then, recap this week's one-on-one with an email outlining the action items for the week ahead.

For Employees

Preparation - Employees should write down a list of questions, roadblocks, discussion points, and any other information they want to discuss to the meeting.

Progress - Employees should bring their list including what they completed, what is still pending, and unanswered questions. This helps identify areas for the manager to accelerate.

360 Feedback - Employees should come to each meeting with an open mind and a willingness to give feedback. Remember, feedback is a 2-way street!



The Flow – What to Discuss

What are the sections of an effective 1:1? How long should they be?

Action Items: (5 min.)

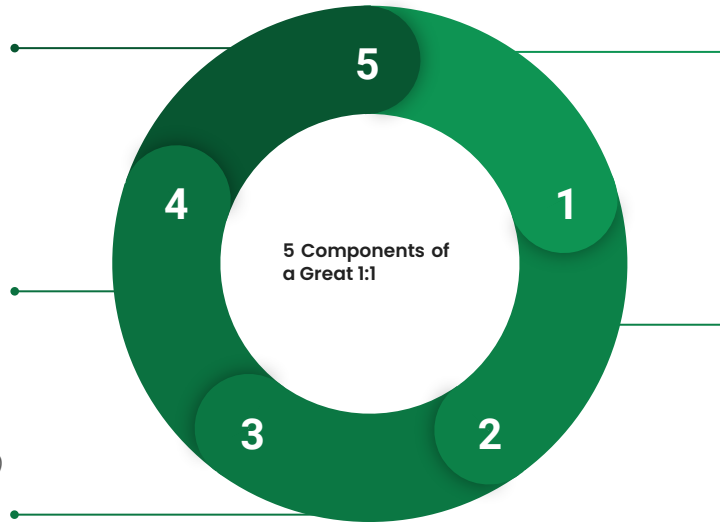
- Plan deliverables and KPIs to achieve in the week ahead.
- Delegate tasks, projects, and initiatives.
- Ensure manager and employee are aligned.

360 Feedback: (15 min.)

- Give employee constructive feedback.
- Employee gives manager constructive feedback.

Roadblocks & Solutions: (10 min.)

- Identify any process, people, resource, etc. challenges currently in the way.
- Brainstorm solutions to those challenges together.



Personal Check-in: (15 min.)

- Gauge how employee is feeling on a scale of 1 - 5.
- What is top of mind for them this week?
- Build a relationship!

Goals & Status Updates: (15 min.)

- Weekly KPI achievement and task progress.
- Project or initiative milestones.
- Recap of goal(s) achievement.

One (1) hour = ideal amount of time for a one-on-one.



Performance Reviews



Why Performance Reviews AND 1:1s?

Performance reviews are for **setting** new goals, expectations, and timelines.

1:1s are for regularly **managing** and guiding goal achievement, expectations, and timelines.

Philosophies – Performance Review

What are the different philosophies around performance reviews?

Performance Review Options			
Option	Best for	Pros	Cons
Generic Rubric	<p>Smaller orgs without HR bandwidth and first-time performance orgs.</p> <p>Start with a more generic and easily applied scorecard to easily get into the rhythm of grading performance, holding review conversations, and setting goals.</p>	<ul style="list-style-type: none">• Much easier to build and apply• Easy to replicate and train all managers on use• Consistent grading and measurement across teams	<ul style="list-style-type: none">• Feedback may not be as granular or role-specific.• Not all teams have the same ratio of emphasis on catch-all attributes.
Role-Specific (Criteria per role)	<p>When you are already in a review rhythm and have HR bandwidth.</p> <p>Once you have a good operating rhythm and a HR team with bandwidth, you can get more specific with scorecard per role.</p>	<ul style="list-style-type: none">• Role-specific feedback is more applicable and actionable.• Measurements of “success” are much more accurate.• Solicits input from each manager, which drives manager engagement and buy-in.	<ul style="list-style-type: none">• Takes a lot of time (especially with 10s or even 100s of roles) to initially build.• Updating scorecards takes more time and new roles require new scorecards.



Steps – Performance Reviews

What are the steps to holding an effective performance review cycle?

- 1** Company makes a philosophical decision about their review style (generic or role-specific).
- 2** Choose a system (Rippling, Lattice, 15Five, Google Forms, etc.) to track your reviews in.
- 3** Build out your reviews and assign managers and employees their respective reviews.
- 4** Employee conducts a self-review to rate their and provide written input.
- 5** Manager conducts a downward review to rate the employee.
- 6** Employee conducts an upward review to rate their manager's performance.
- 7** Once all reviews are submitted, HR does a review of all submissions.

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Steps – Performance Reviews

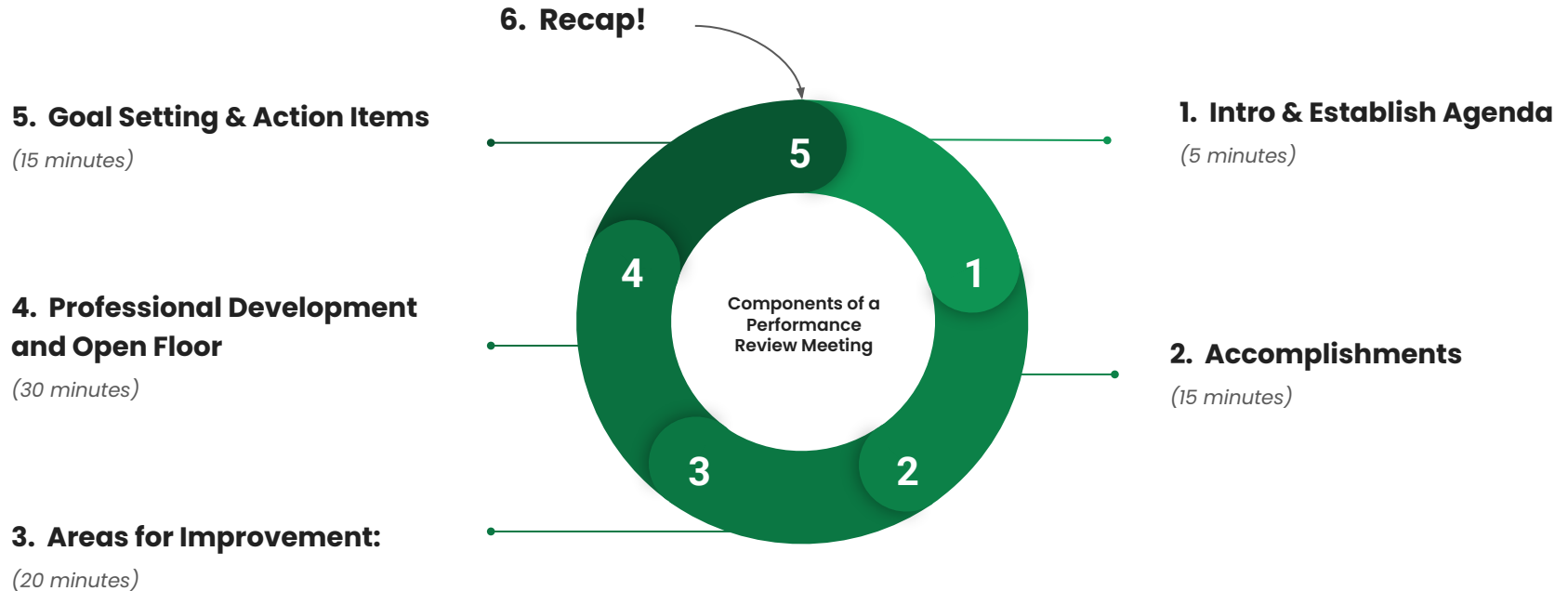
What are the steps to holding an effective performance review cycle?

8	Manager schedules the 1:1 review discussion meeting with the employee.
9	Manager shares the self and manager review with the employee 1-3 days prior to the review meeting.
10	Employee and manager meet to discuss the review, set goals, and share feedback.
11	HR reviews the upward feedback (confidential) and identifies areas for manager coaching.
12	HR meets with managers to recap on review cycle, hot points, and areas for manager growth.
13	Optional - HR and Finance kick off merit cycle, beginning with budget allocation per department.



The Flow – Performance Reviews

What are the steps of an effective performance review meeting?



90 minutes = ideal amount of time for a performance review meeting.



9-box Grids – Performance Reviews

9-box grids are an excellent way to round out performance reviews!



Career Pathing



Career Pathing (aka “Job Architecture”) is a fancy phrase for a library of well built job descriptions of each position in your company. The purpose is to outline how employees can move upward or laterally through the organization.

The Benefits – Career Pathing

How does a career path allow ICs and managers to flourish?

Create career pathing that....

Outlines objective criteria that employees can achieve/excel at to move up to the next level.

Replicates as your job description, interview scorecard, and potentially as your performance review scorecard.

Ties to compensation bands per level/role.



Benefits include...

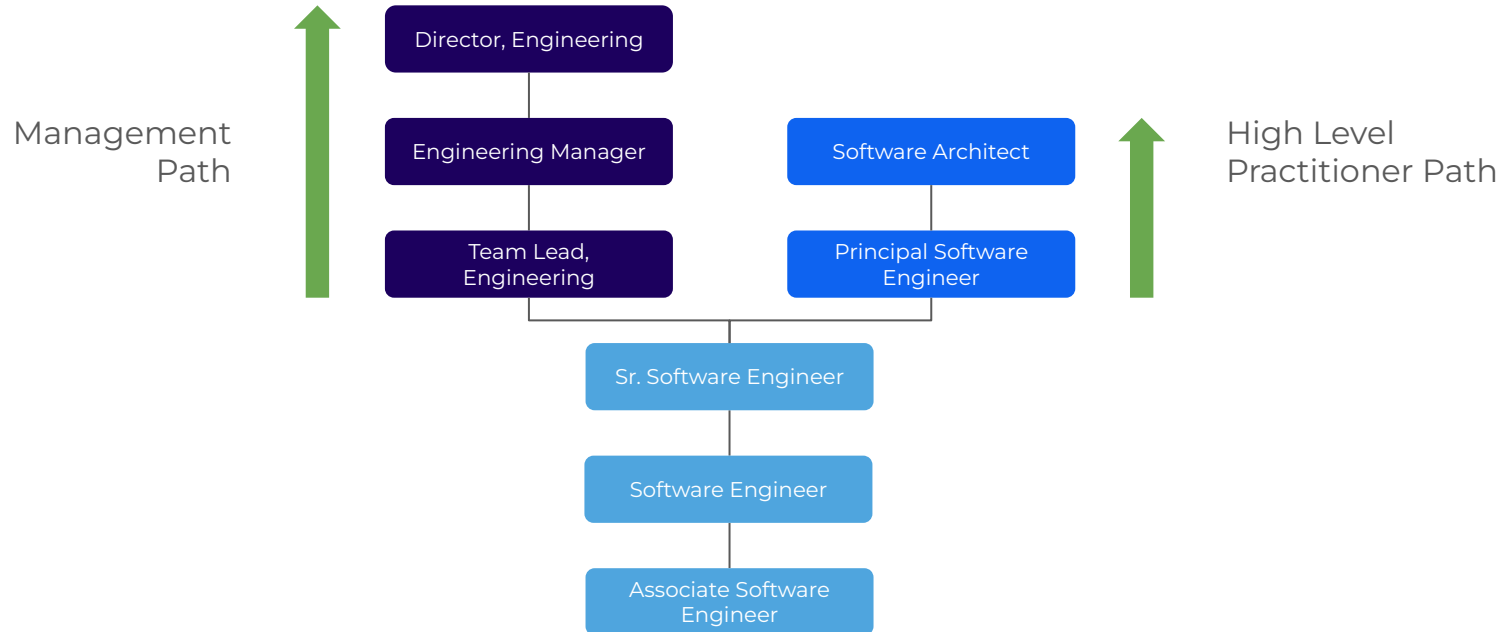
Creates a “go and earn it” culture (i.e. accountability).

Major time savings combined with unbiased, measurable objectivity when hiring, reviewing, and promoting.

Control company costs and forecasting for both existing employees and future hires while establishing pay equity.



Engineering – Career Pathing



Example Scorecard – Career Pathing

Associate Software Engineer Competencies

Knowledge:	
Analytical Thinking	Able to evaluate complex business requirements and find creative and efficient solutions within the Salesforce platform.
Problem Solving	The ability to find creative and efficient solutions within the Salesforce platform confines. Develop your ability to analyze problems, break them down into manageable components, and devise effective strategies to overcome them.
Programming Experience	Has done some programming in college or has hands on experience or side projects that show technical skills

Technical Skills:	
Programming Languages	Basic coding experience, and knowledge of multiple programming languages including Java, JavaScript, and SQL.
App Development	Actual real world experience developing an App from a job or internship. Taking practical knowledge into creation and use.
OOP	Good general concepts of Object Oriented Programming on how to organizes software design around data, or objects, rather than functions and logic.

Abilities:	
Learning Mindset	Ability to embrace challenges, persist through obstacles, and learn from constructive criticism. Can acknowledge failures and find inspiration to keep improving through effort, learning, and persistence.
Curious	Enhance your problem-solving skills by staying curious, seeking best practices, and actively engaging with the Salesforce developer community..
Communication	Exchanging ideas, thoughts, opinions, knowledge, and data so that the message is received and understood with clarity and purpose.
Collaboration	Working well with others inside and outside your organization while achieving a common goal. Effectively building relationships with your team, resolving conflicts, and creating a work environment where everyone feels included and respected.
Critical Thinking	The ability to question; to acknowledge and test previously held assumptions; to recognize ambiguity; to examine, interpret, evaluate, reason, and reflect; to make informed judgments and decisions; and to clarify, articulate, and justify positions.

Achievements

To become a Salesforce Developer

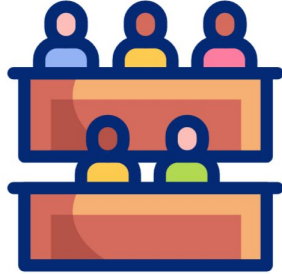
Salesforce Learning - 10,000 points Trailhead Learning Badges.

Salesforce Certification - JavaScript Developer 1.

Salesforce Certification - Platform App Builder.

Project - Successful in fielding and solving bugs and small fixes to existing features

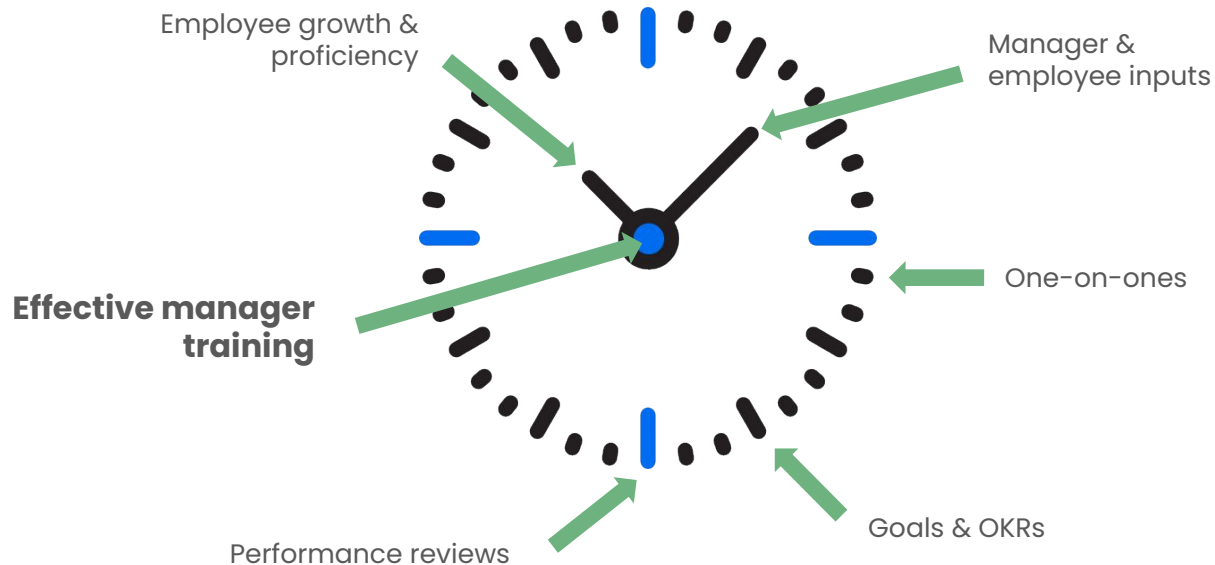




Manager Training

The Importance – Manager Training

Think of employee growth as a clock with seconds, minutes, and hours. The manager's role is to get every clock ticking as quickly as possible.



The Importance – Manager Training

Why is it important to effectively train frontline and first-time managers?

1

Consistent Excellence

Effective manager training ensures that you create a consistent, replicable, and impactful approach to management across the organization, regardless of department. You can ramp up managers with a breeze.

2

↑ Productivity & Performance

Equips managers with necessary skills to effectively lead their teams, manage resources, and delegate tasks. This leads to an increase in productivity.

3

Promote from Within

Effective managers create effective managers. This can lead to substantial recruiting savings while significantly boosting employee morale and engagement.

4

Retention

Two of the top reasons talented individuals leave organizations are negative manager relationships and lack of growth opportunity. Managers can be equipped to avoid both issues.



Effective employees are built by effective managers.

Effective managers are built through effective training.

Q&A?

What are the sections of an effective 1:1? What's the right mix of feedback vs. discussing ongoing work?

Activity	Question for the manager to ask:
Personal Check-In	On a scale of 1-5, how are you feeling this week?
Status Update	Tell me what we accomplished this week. What did we get done?
Roadblocks & Solutions	Are there any process, people, or resource challenges currently in the way keeping us from achieving our goals?
Opportunity for Both Sides to Give Feedback	Here's my feedback for you... Now what feedback do you have for me?
Action items	What are we going to get done next week? What are our top three action items?

What are the keys to running effective 1:1s?

Managers

Write out **rules of engagement** for 1:1s at the beginning ✓

Use a **weekly agenda** and review last week's notes to maintain accountability ✓

Use a tool like **Lattice** or **15five** to capture and track 1:1 notes ✓

Recap it with an **email** ✓

Employees

They should **drive** the preparation ✓

They might come to each meeting with **1-3 things** they want to talk about ✓

They should be prepared to discuss their **progress, roadblocks, and goals** for next week ✓

What are the different philosophies around performance reviews? How do you decide what approach is right for you?

Performance Review Options			
Option	Best for	Pros	Cons
Generic Rubric	<p>Smaller orgs without HR bandwidth and first-time performance orgs.</p> <p>Start with a more generic and easily applied scorecard to easily get into the rhythm of grading performance, holding review conversations, and setting goals.</p>	<ul style="list-style-type: none">• Much easier to build and apply• Easy to replicate and train all managers on use• Consistent grading and measurement across teams	<ul style="list-style-type: none">• Feedback may not be as granular or role-specific.• Not all teams have the same ratio of emphasis on catch-all attributes.
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What are the steps to holding an effective performance review cycle?

1

Every company has to make a philosophical decision about their reviews

2

Decide what system or form you'll track reviews in

3

A performance review is sent out for employees to do a self-review

4

The manager does a downward review

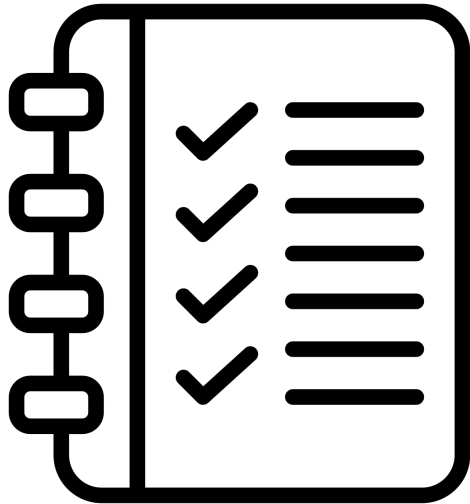
5

Share the overall review with the employee a couple of days ahead of the review meeting

6

Meet the employee for a 60-90 minute live review

What should the agenda for an effective performance review look like?



1. Discuss **overall performance** over the prior period
2. **Review goals** set in the last performance review and how you progressed against them
3. Identify the **top 2-3 accomplishments** the employee is most proud of
4. Discuss **areas of growth** for the employee
5. Employee-to-manager **feedback**
6. Set **future goals** and **action plans**

What are the different types of collateral that support performance Improvement and disciplinary action?

Performance Improvement Plan



- A measurable plan to improve the performance of an employee failing to meet the specific criteria of their role
- Only used when role performance doesn't meet expectations
- They should be produced and communicated in a collaborative spirit

Disciplinary Action Plan



- It's a plan with measures to remedy unacceptable behavior
- When an employee violates a rule in the employee handbook
- Every company needs to have an employee handbook

Nine-box grid



- A tool to grade the performance and future potential of your employee base
- It can show you who needs mentorship, coaching, or promotions
- It's a great tool to visualize where to allocate managerial time/resources

How can managers put themselves in line for promotions? How should managers request a promotion?

Define an Architecture

Oftentimes, the next step for those promoted to manager isn't well-defined. Managers don't just work on architecture for those below them; they should consider it for themselves!

Take Initiative

If a Director is hired with VPs above them, they need to be proactive if they want to eventually get considered for a VP role.

Build the next level and move to create buy-in

Draft the next steps and tell the VP that you want to fill it in together. Come up with a proposal, ask for their feedback, and seek to build trust.

What kind of job architecture allows individual contributors and managers to flourish?

Create a Job Architecture that...

Ties growth opportunities to objective measurements



Ties compensation bands to architecture levels

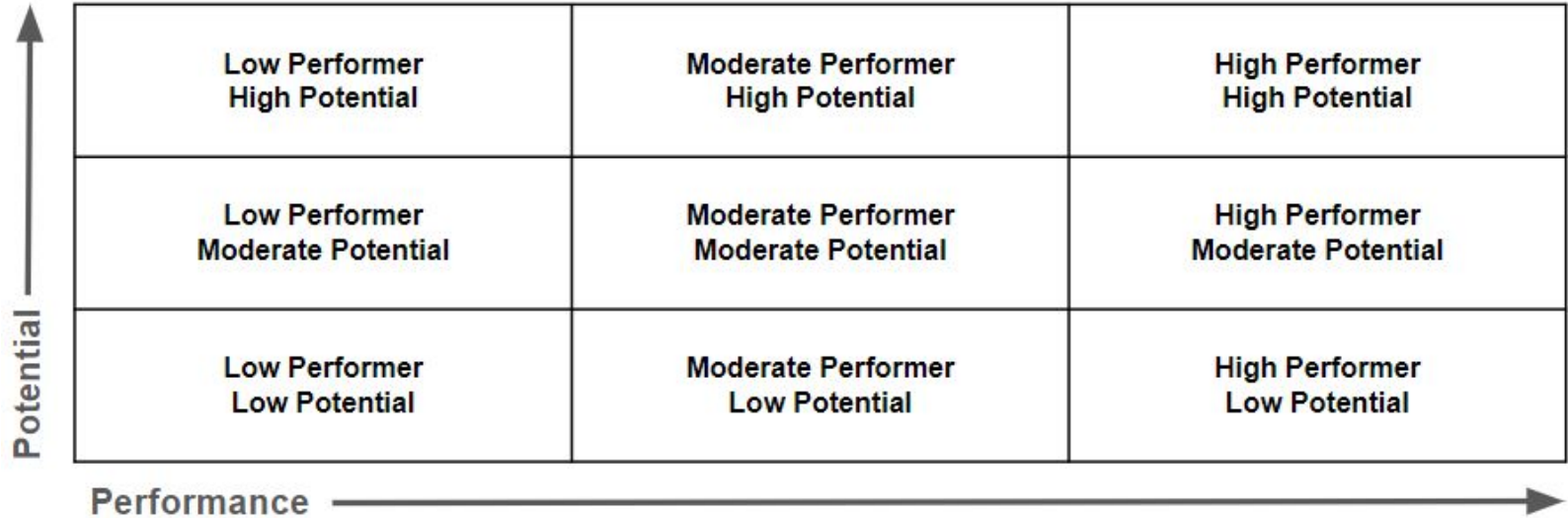


Benefits include...

An initiative-driven and transparent culture, retention, and it incentivizes employee accountability for moving to the next level

Equitable pay and better understanding of future costs

Nine Box Grid



Tips:

- 1) *Not every person needs or wants to move into a managerial role*
- 2) *Low performer, low potential is always bad.*

What is the purpose of holding manager-employee 1:1s? How often and long should they be?

Some Interesting Stats

- Employees of managers who do not hold 1:1 meetings are **4x** more likely to be **disengaged** compared to employees of managers that do hold 1:1 meetings.
- Further, those same employees above are **2x** as likely to view leadership at the company more **unfavorably**.
- Employees who work for a manager who helps them set performance goals are **17x** more likely to be **engaged** than disengaged.
- Workgroups with high levels of employee engagement experience **22% higher profitability** and **21% higher productivity** compared with workgroups with low levels of engagement.
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Source: <https://news.gallup.com/businessjournal/174197/managers-focus-performance-engagement.aspx>

What is the purpose of holding manager-employee 1:1s? How often and long should they be?

Multidimensional benefits

- Establishes a feedback loop of trust
- Creates real-time problem solving
- Addresses career growth concerns

The cadence

- Ideally held weekly for each employee
- One (1) hour is a good length
- Should be held on the same day/time each week.

***Workplaces with high levels of employee engagement experience
22% higher productivity and **21% higher profitability.***

Why is it important to effectively train frontline and first-time managers?



A strong manager cohort gets everybody on the same operating rhythm

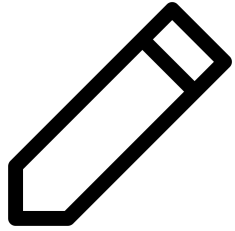


The CEO can't be responsible for everyone, managers help trickle down their vision

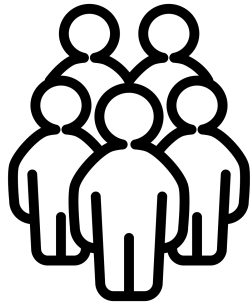


Good management is the lifeblood of your culture

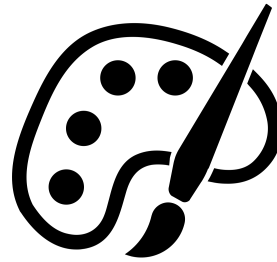
What kind of job architecture allows individual contributors and managers to flourish?



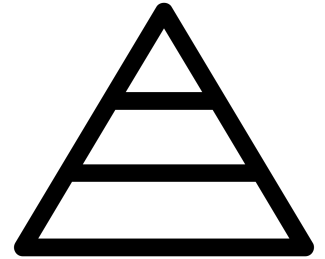
Start simple and create only as many levels as you need



The sweet spot is 5 direct reports

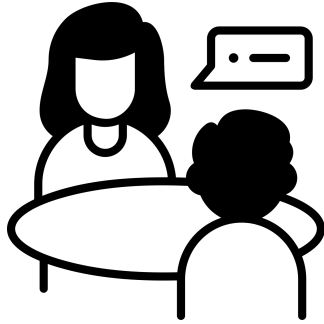


The specifics of job architectures are more art than science

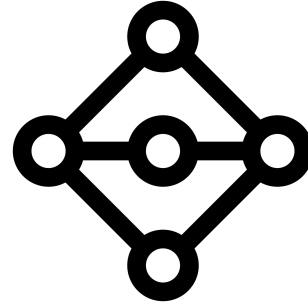


2-3 different levels per role type is a decent baseline

What are common pitfalls?



**Good 1:1s need to come
before performance
reviews**



**If you don't do the
fundamentals, your
program is going to fall
apart**

Questions