



Performance Reviews that don't Suck

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IHS Markit™

atlanta
GEORGIA
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About Todd

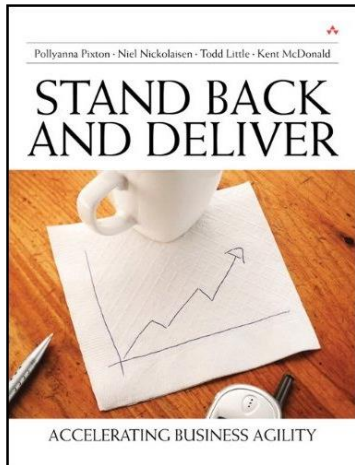


- Executive roles as VP Product Development, Director of Software & Technology

HALLIBURTON



- **@toddelittle**



and Andrew



- Director of Product Development
- 10 years of people management experience



Quick Survey

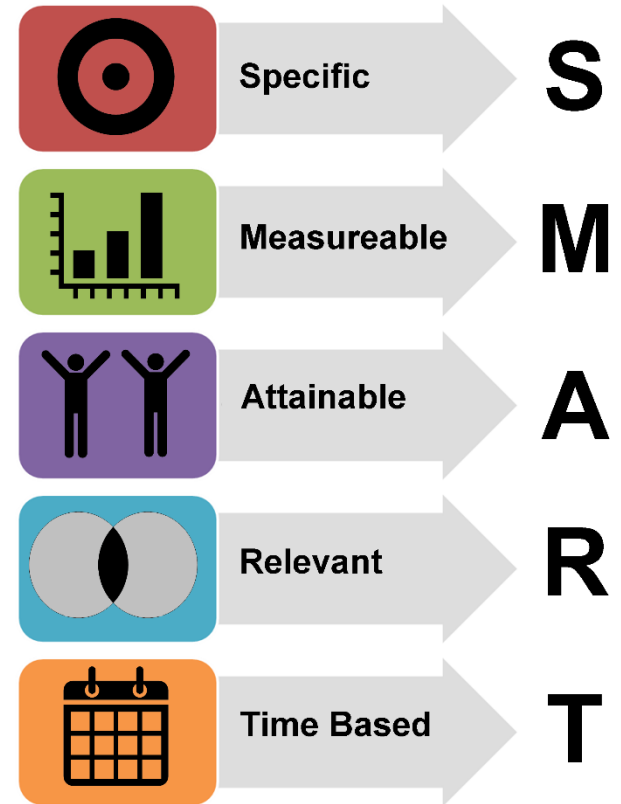
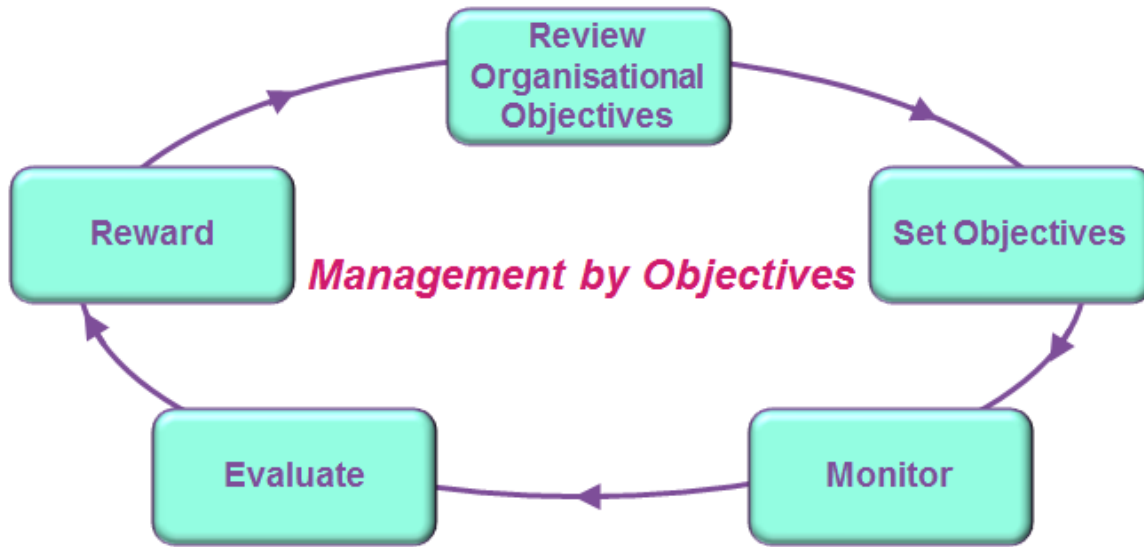
- How many of you have:
 - Mandatory (annual) performance reviews?
 - Abandoned performance reviews?
 - SMART Objectives?
 - Stack/Forced ranking?
 - Corporate performance management system?

Breakout session:

- What challenges have you seen with performance reviews?
- What have you seen that has worked well with your performance reviews?



Traditional Approach to Objectives



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"Calendar", "People" and "Target" icons from the NounProject.com collection

Problems with SMART Objectives

Increase code production rate to ___ (#)
lines of code per ___ (unit of time) by
___ (date)

SMART Objectives and unintended consequences

Dilbert



SOS - SMART Objectives Suck

- Do not comprehend uncertainty
- Unintended consequences
- Myopic approach to career coaching
- Behind every objective is a subjective



SOS - SMART Objectives Suck

- **D**o not comprehend uncertainty
- **U**nintended consequences
- **M**yopic approach to career coaching
- **B**ehind every objective is a subjective



Abolish management by objective and annual performance reviews



W. Edwards Deming

Do performance reviews have to suck?

Holy jitters!
What's wrong
Batman?

My
performance
review is today.



Guiding principles

Values are what we value



Five Core Responsibilities

- Deliver technical solutions
- Partner with customer stakeholders
- Collaborate with teammates
- Build quality into software from the ground up
- Take initiative and innovate

Value is what we value

- **Impact is the primary measure of career growth**
- **Impact = Behaviors + Skills + Opportunity**



Coach

Evolve



Foster

Develop



Create

Seize

With a promotion comes higher expectations



Delivery against Expectations



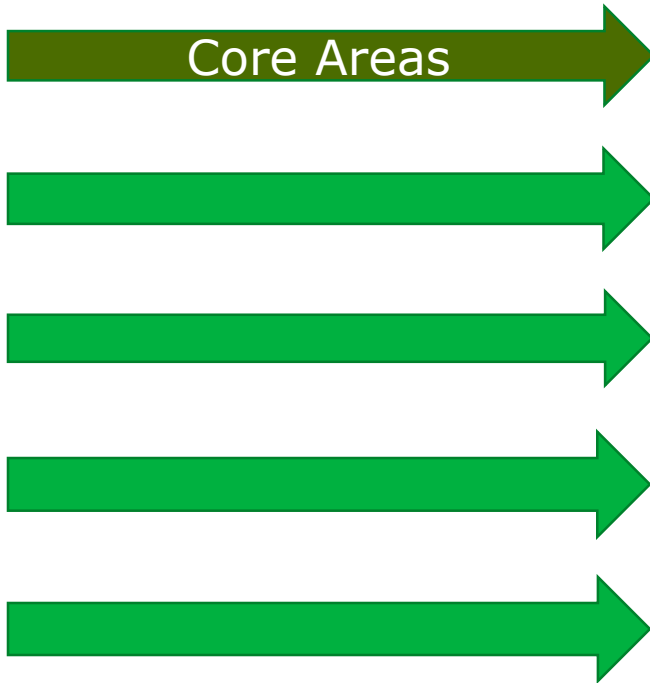
Associate



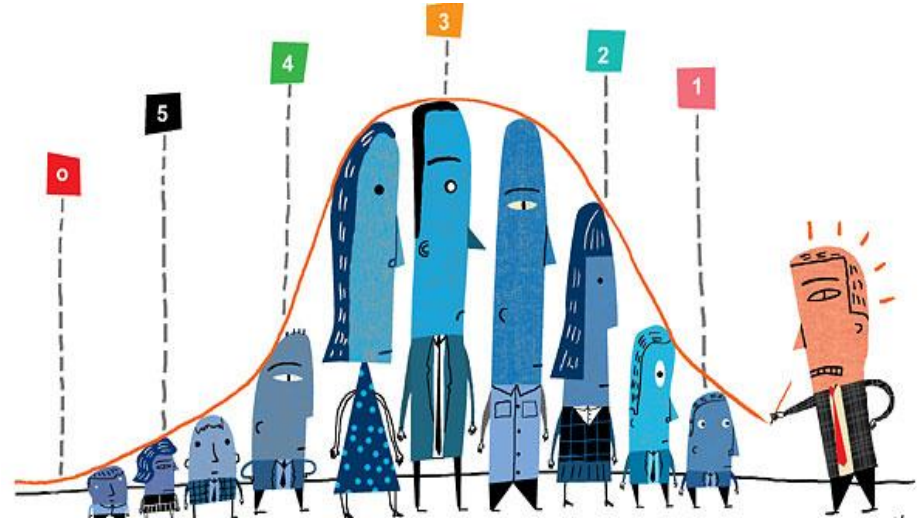
Senior



Sr. Principal



We value career development over performance ratings



What we did

Org Level	J	I	H	G	F	E
Potential Job Title	Associate Software Engineer	Software Engineer	Sr. Software Engineer	Principal Software Engineer	Sr. Principal Software Engineer	Executive Software Engineer
Job Complexity / Scope Differentiators	<ul style="list-style-type: none"> Building software: Under supervision: Design, code and test software as part of a project team. 	<ul style="list-style-type: none"> Building software: Under guidance: Design, code and test software as part of a project team. 	<ul style="list-style-type: none"> Building software: Self-guided: Design, code and test software as part of a project team. 	<ul style="list-style-type: none"> Building software: Lead: Design, code and test software as part of a project team. 	<ul style="list-style-type: none"> Building software: Mentor: Design, code and test software as part of a project team. 	<ul style="list-style-type: none"> Building software: Establish organization plan: Design, code and test software as part of a project team.
	<ul style="list-style-type: none"> Testing procedures: Follow procedures: Ensure application is tested throughout development and before release. 	<ul style="list-style-type: none"> Testing procedures: Follow procedures: Ensure application is tested throughout development and before release. 	<ul style="list-style-type: none"> Testing procedures: Establish procedures: Ensure application is tested throughout development and before release. 	<ul style="list-style-type: none"> Testing procedures: Establish procedures: Ensure application is tested throughout development and before release. 	<ul style="list-style-type: none"> Testing procedures: Mentor new techniques: Ensure application is tested throughout development and before release. 	<ul style="list-style-type: none"> Testing procedures: Establish organization plan: Ensure application is tested throughout development and before release.
Testing		<ul style="list-style-type: none"> Professional development: Under guidance: Grow knowledge and skills in area of specialization. 	<ul style="list-style-type: none"> Professional development: Self-guided: Grow knowledge and skills in area of specialization. 	<ul style="list-style-type: none"> Professional development: Lead: Grow knowledge and skills in area of specialization. 	<ul style="list-style-type: none"> Professional development: Mentor: Grow knowledge and skills in area of specialization. 	<ul style="list-style-type: none"> Professional development: Establish organization plan: Grow knowledge and skills in area of specialization.
		<ul style="list-style-type: none"> Accountability: Task level: Accurately estimate and deliver against estimates. 	<ul style="list-style-type: none"> Accountability: Story level: Accurately estimate and deliver against estimates. 	<ul style="list-style-type: none"> Accountability: Feature level: Accurately estimate and deliver against estimates. 	<ul style="list-style-type: none"> Accountability: Program level: Accurately estimate and deliver against estimates. 	<ul style="list-style-type: none"> Accountability: Organization level: Accurately estimate and deliver against estimates.
		<ul style="list-style-type: none"> Project Management: Provides input: Project planning 	<ul style="list-style-type: none"> Project Management: Manage small projects: 	<ul style="list-style-type: none"> Project Management: Manage large projects: 	<ul style="list-style-type: none"> Project Management: Manage program: Project planning 	<ul style="list-style-type: none"> Project Management: Manage multiple programs: Project planning

Discovering the Core Responsibilities

Delivery	Deliver technical solutions
Business Engagement	Partner with customer stakeholders
Teamwork	Collaborate with teammates
Quality	Build quality into software from the ground up
Initiative and Innovation	Take initiative and innovate

Build quality into software from the ground up







- *Key contributions to consider:*
 - Clean code
 - Automated unit & integration tests
 - Peer review
 - Reduction of technical debt

Expectations by level

Associate Software Engineer	<i>With direction</i>
Software Engineer	<i>With support</i>
Senior Software Engineer	<i>Self-directed</i>
Principal Software Engineer	<i>Leader</i>
Senior Principal Software Engineer	<i>Mentor</i>
Executive Software Engineer	<i>Visionary</i>






Core Responsibility Framework

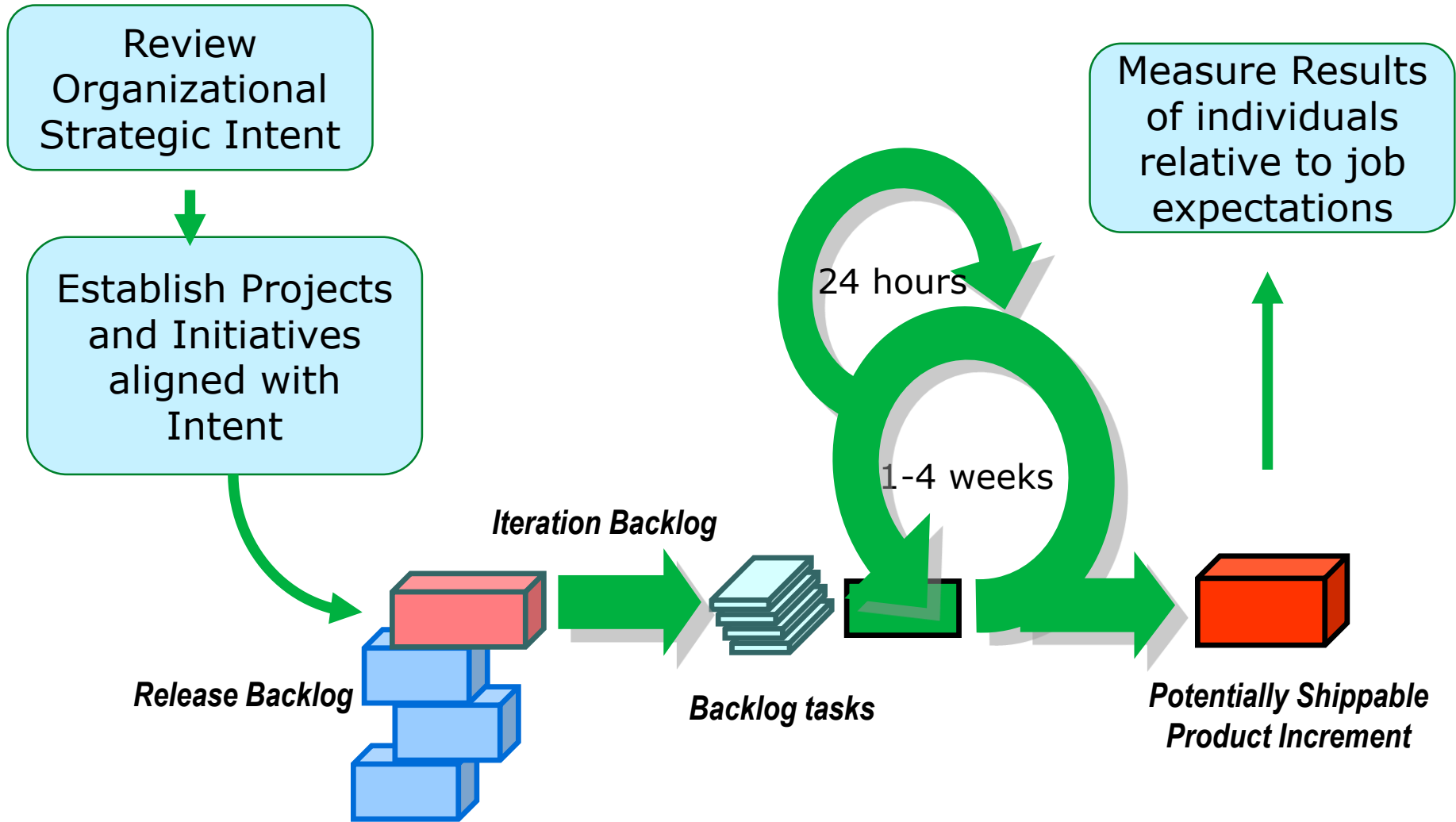
Impact	Behaviors		Delivery	Customer Focus	Teamwork	Quality	Initiative & Innovation
Recognized Corporate Resource	Leader / Extraordinary Contributor						
Deep and/or Broad	Leader / Extraordinary Contributor						
Feature	Self-Directed						
User Story	With Support						
Simple User Story	With Direction						

Partnering with HR



Abby Britt,
Sr HR Manager

Customer Delight								
# Objective Name	Measure of Success	Weight	Start Date	Due Date	Status	% Complete	Action	
1.1 Partner with customer stakeholders to create business value	Key contributions to consider: <ul style="list-style-type: none"> • Understanding customer needs and designing solutions to meet them • Providing useful estimates to support release planning • Agility - delivering highest value software in small increments • Responsiveness – addressing urgent customer issues in a timely manner Expectation: Strong Contributor	20.0%	12/01/2014	11/30/2015	Not Started	0.0%		
Profitable Top-and-Bottom Line Growth								
# Objective Name	Measure of Success	Weight	Start Date	Due Date	Status	% Complete	Action	
2.1 Deliver technical solutions to create business value	Key contributions to consider: <ul style="list-style-type: none"> • Skillful selection & application of appropriate tools and technology • Productive construction of software solutions to business requirements • Design and implementation of appropriate software architecture • Accountability – delivering on commitments Expectation: Strong Contributor	20.0%	12/01/2014	11/30/2015	Not Started	0.0%		
Colleague Success								
# Objective Name	Measure of Success	Weight	Start Date	Due Date	Status	% Complete	Action	
3.1 Collaborate with teammates to create business value	Key contributions to consider: <ul style="list-style-type: none"> • Teamwork • Communication • Knowledge sharing Expectation: Strong Contributor	20.0%	12/01/2014	11/30/2015	Not Started	0.0%		
Corporate Sustainability								
# Objective Name	Measure of Success	Weight	Start Date	Due Date	Status	% Complete	Action	
4.1 Build quality into software from the ground up to create business value	Key contributions to consider: <ul style="list-style-type: none"> • Clean code • Automated unit & integration tests • Peer review • Reduction of technical debt Expectation: Strong Contributor	20.0%	12/01/2014	11/30/2015	Not Started	0.0%		
Shareowner Success								
# Objective Name	Measure of Success	Weight	Start Date	Due Date	Status	% Complete	Action	
5.1 Take initiative and innovate relentlessly to create business value	Key contributions to consider: <ul style="list-style-type: none"> • Initiative and proactivity • Problem solving & resourcefulness • Investment in ongoing skill development • Contribution of new ideas and insights that drive business success Expectation: Strong Contributor	20.0%	12/01/2014	11/30/2015	Not Started	0.0%		



Pilot program rollout

Core Responsibilities of Software Engineers

A Manager's Guide

This is not about objectives, and it's not about performance evaluations. It's about career development. To build a high performance culture that attracts, retains and develops talented software engineers while creating tremendous business value, IHS must invest in the quality of the 1:1 coaching relationship between managers and their direct reports. We will use Core Responsibilities as a tool for enhancing the value of that relationship.

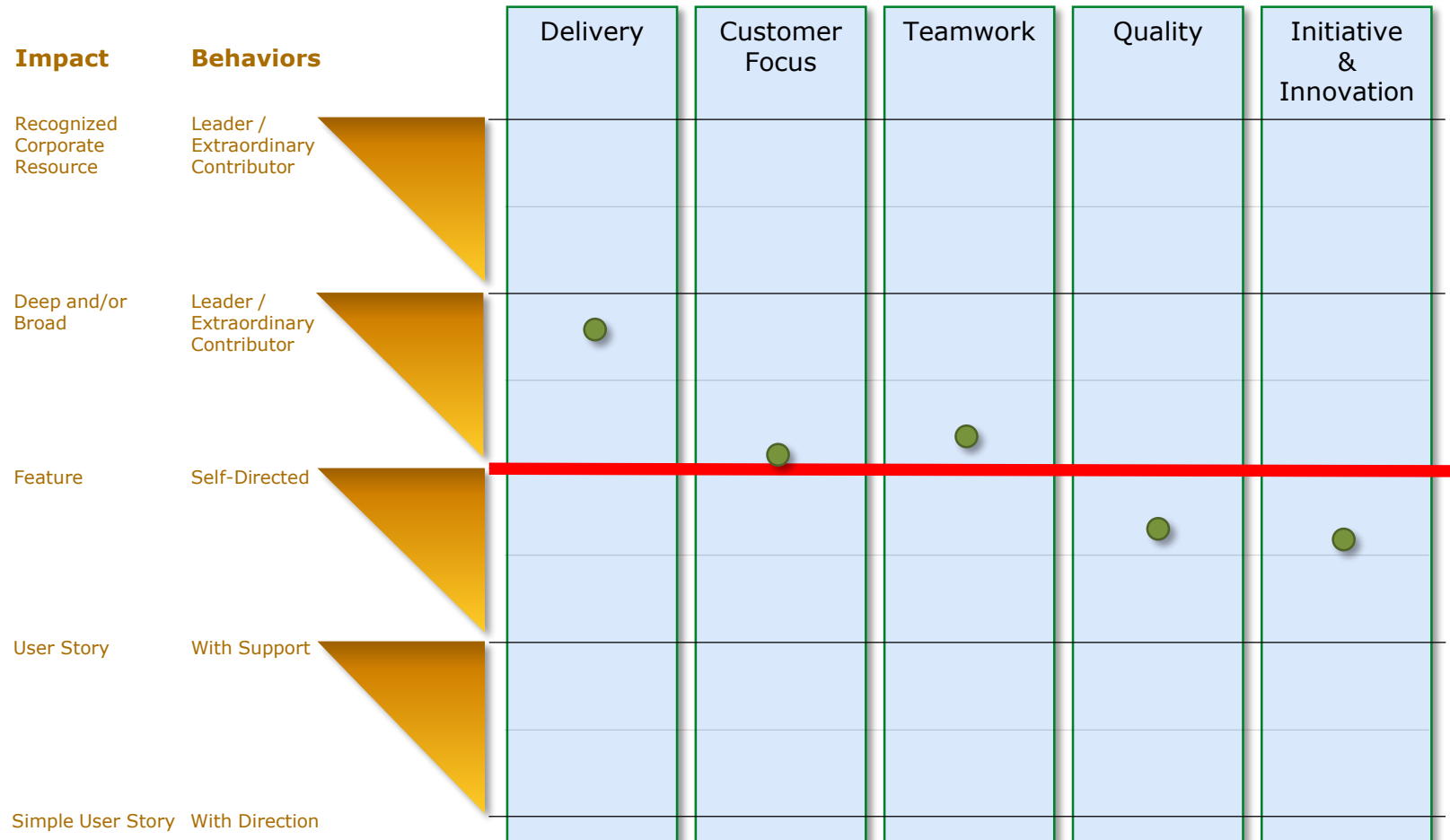
Coaching is a year round activity

A great manager engages in rich 1:1 career development conversations with direct reports throughout the year. In these conversations, the manager explains expectations, provides timely feedback and suggests opportunities for growth. The year-end review process ends up being the summary of an ongoing conversation rather than the dramatic unveiling of overdue (and possibly unexpected) feedback.

Use these Core Responsibilities as fuel for those great conversations. Use them throughout the year to help colleagues understand:

- What we're trying to accomplish as an organization
- What is expected of them
- How they are performing against those expectations
- Where they should focus on improving
- What are the expectations of the next level up
- What opportunities exist to help them grow their career

Performance Evaluation Model



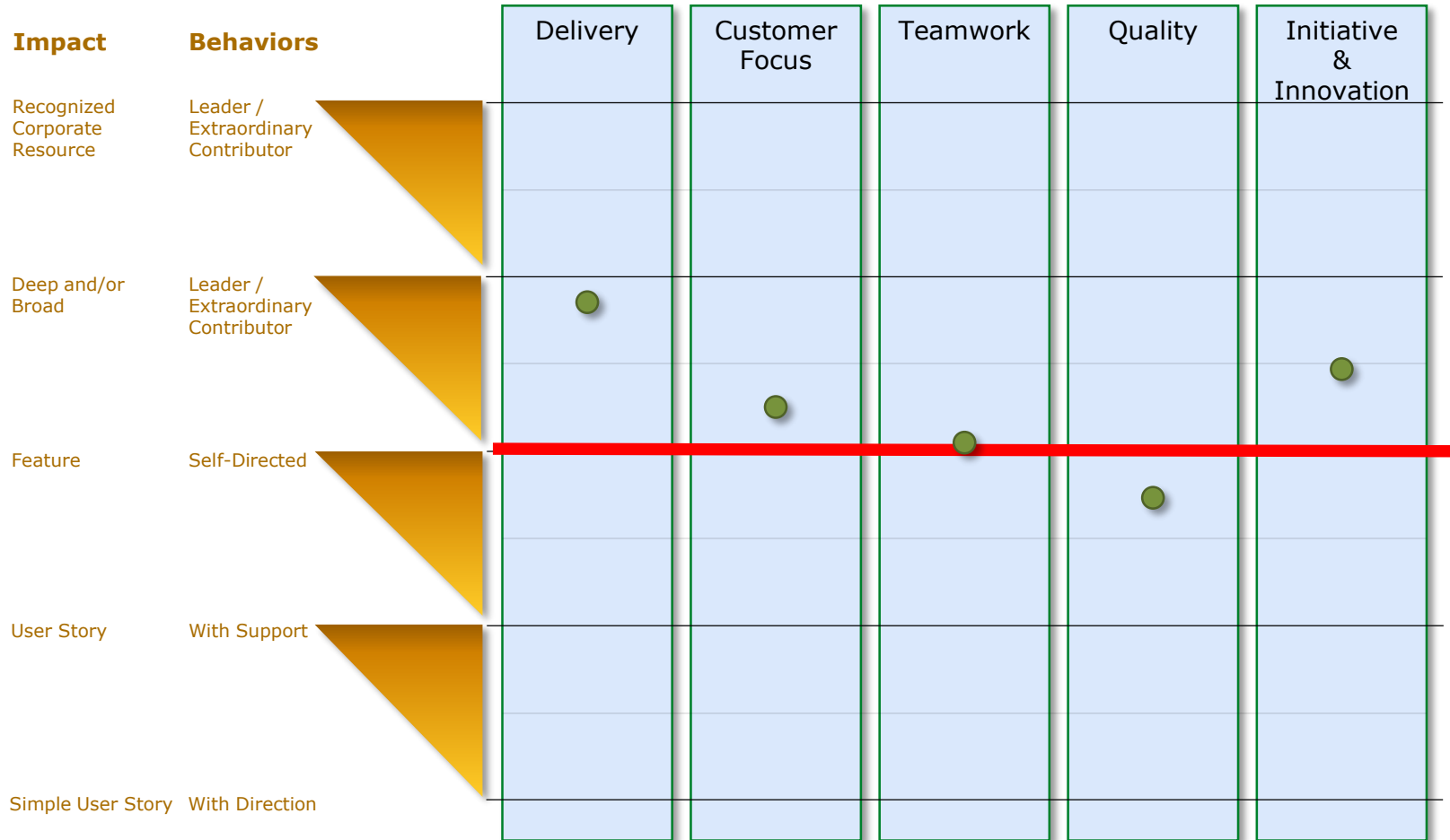
Exercise

John the Journeyman

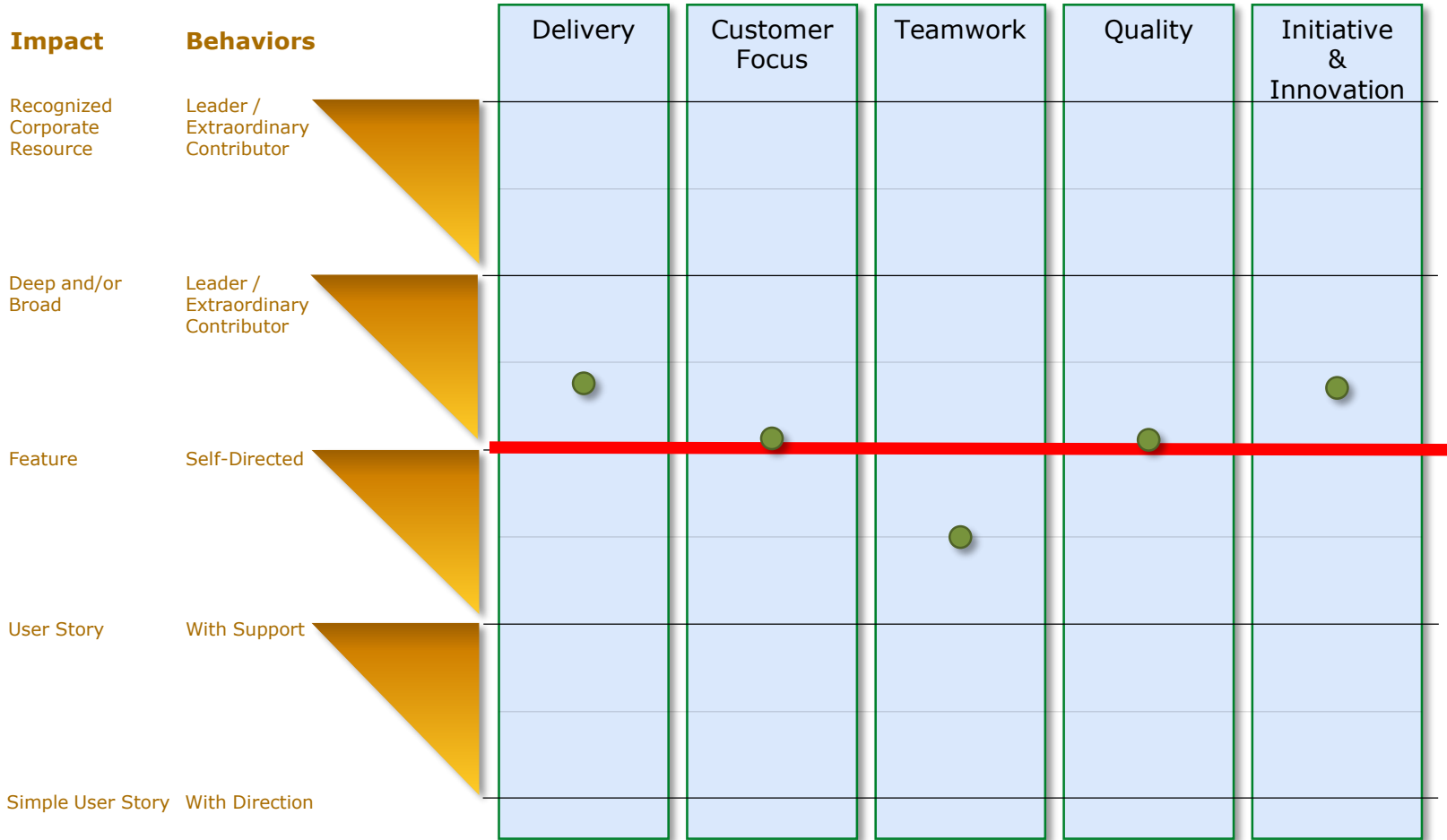
- Gather into groups
- Get to know the character in your handout – develop a little backstory together
- Think about the dot positions – do they meet expectations?
- What's your coaching message?



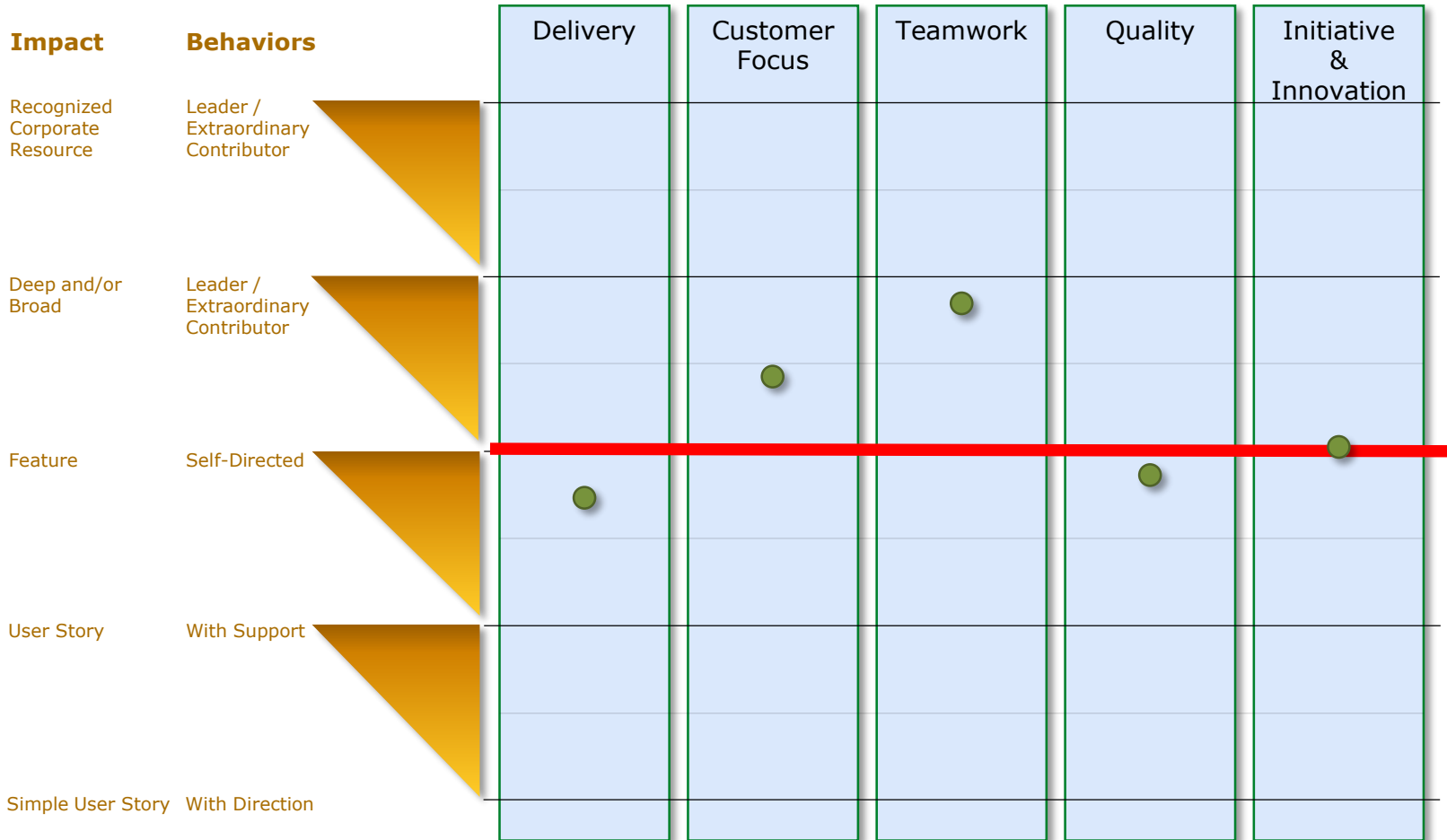
Heather the Hero



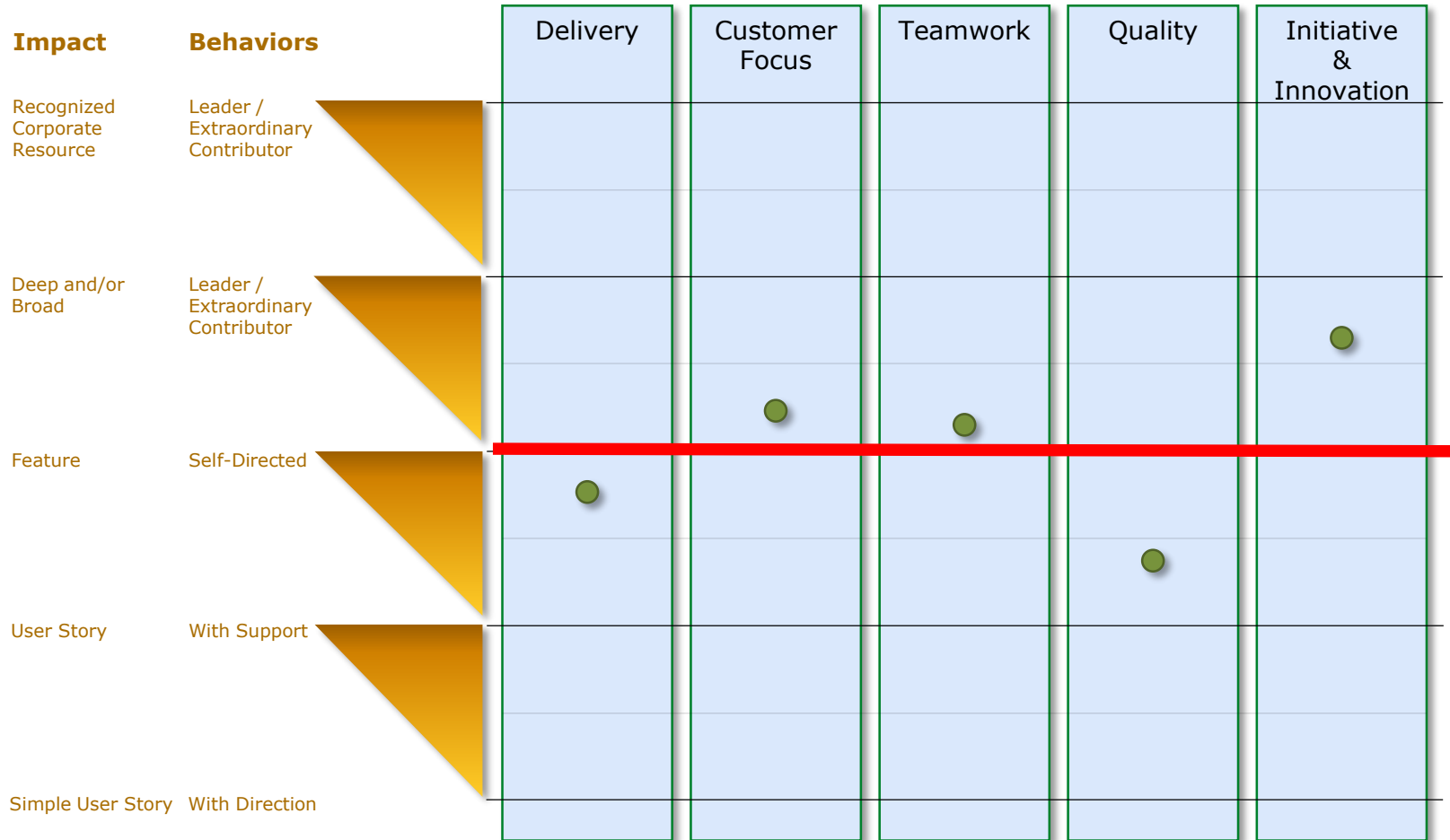
Ivan the Individualist



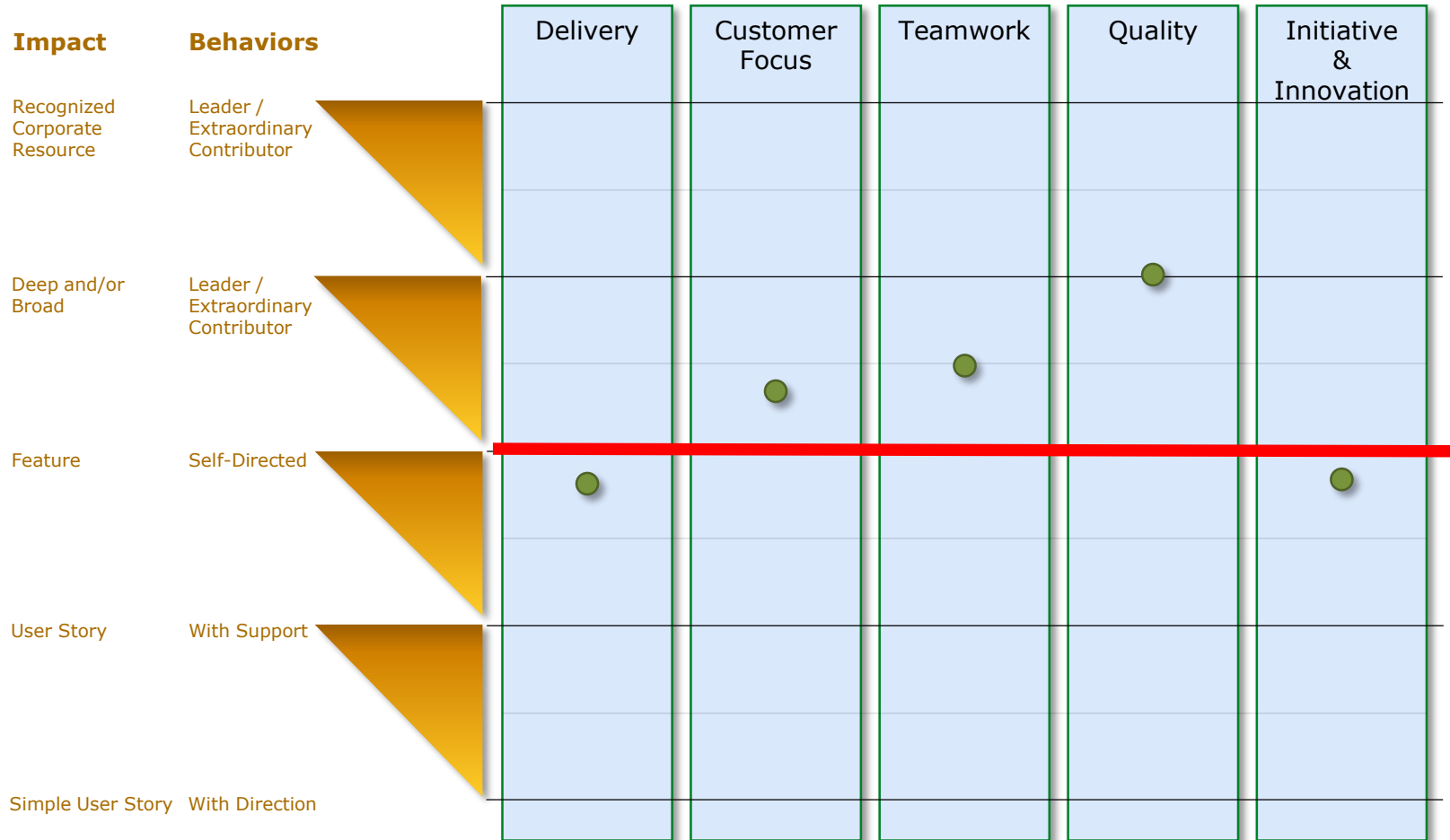
Tessy the Team Angel



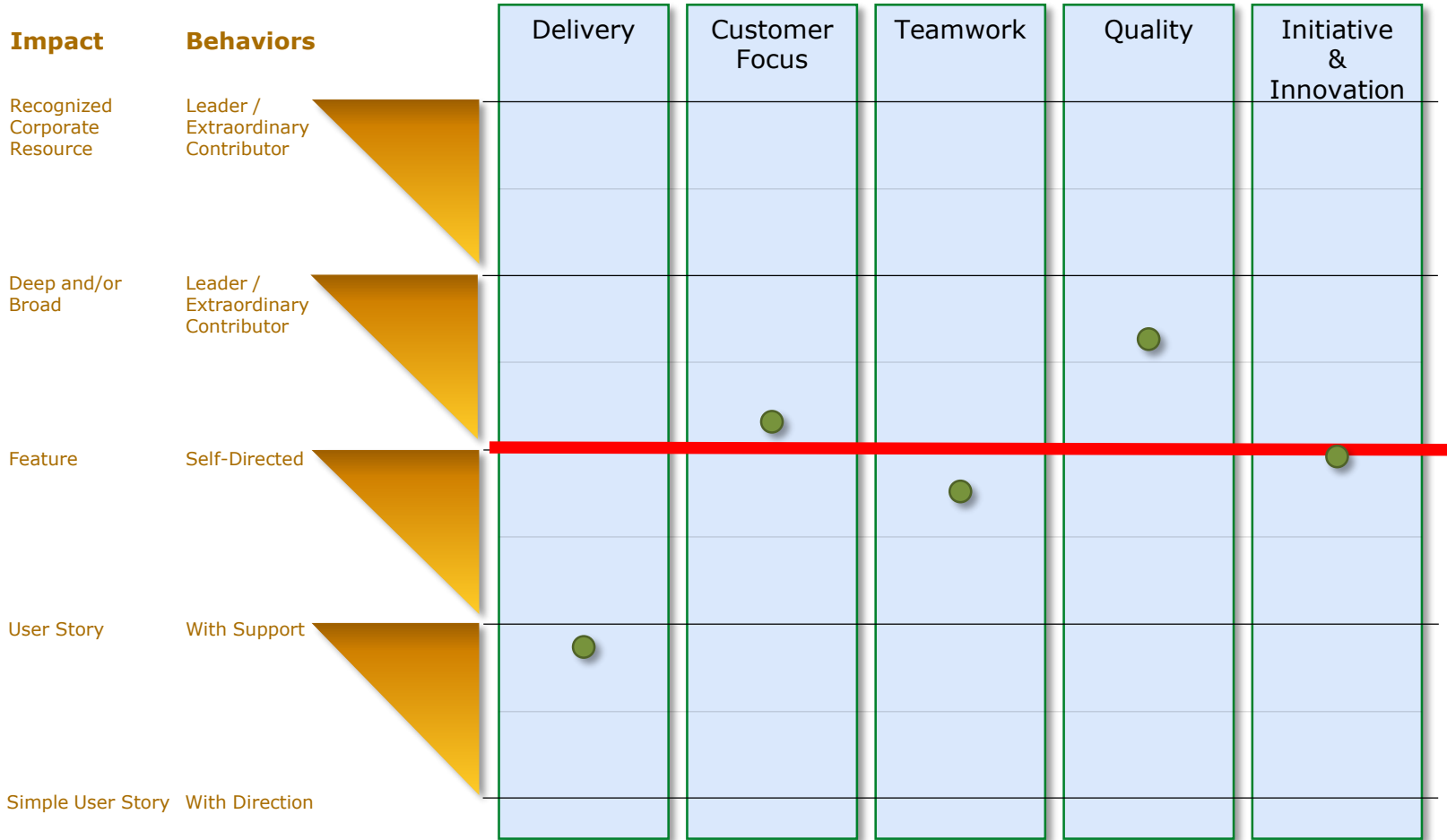
Irene the Innovator



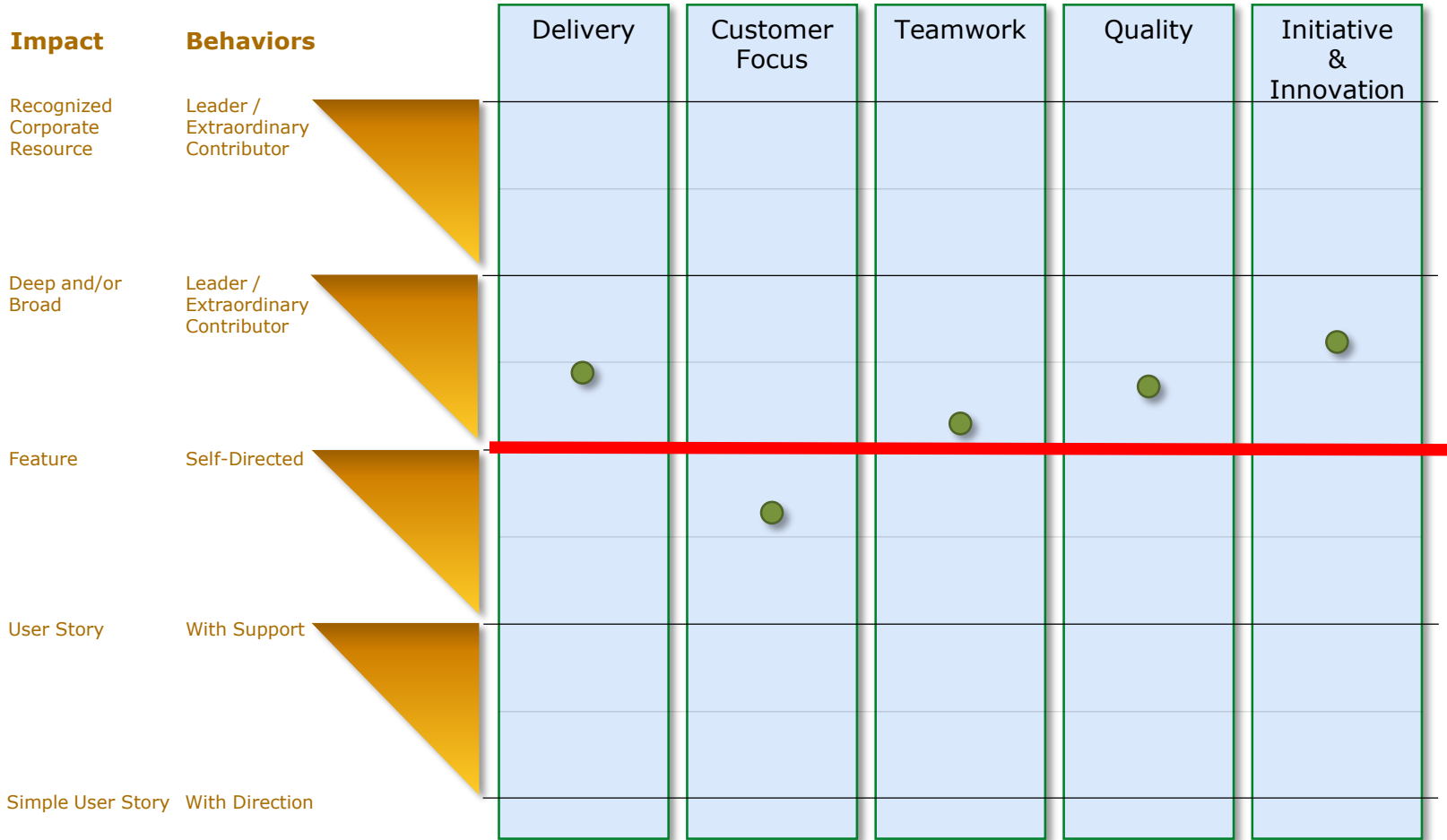
Quincy the Quality Evangelist



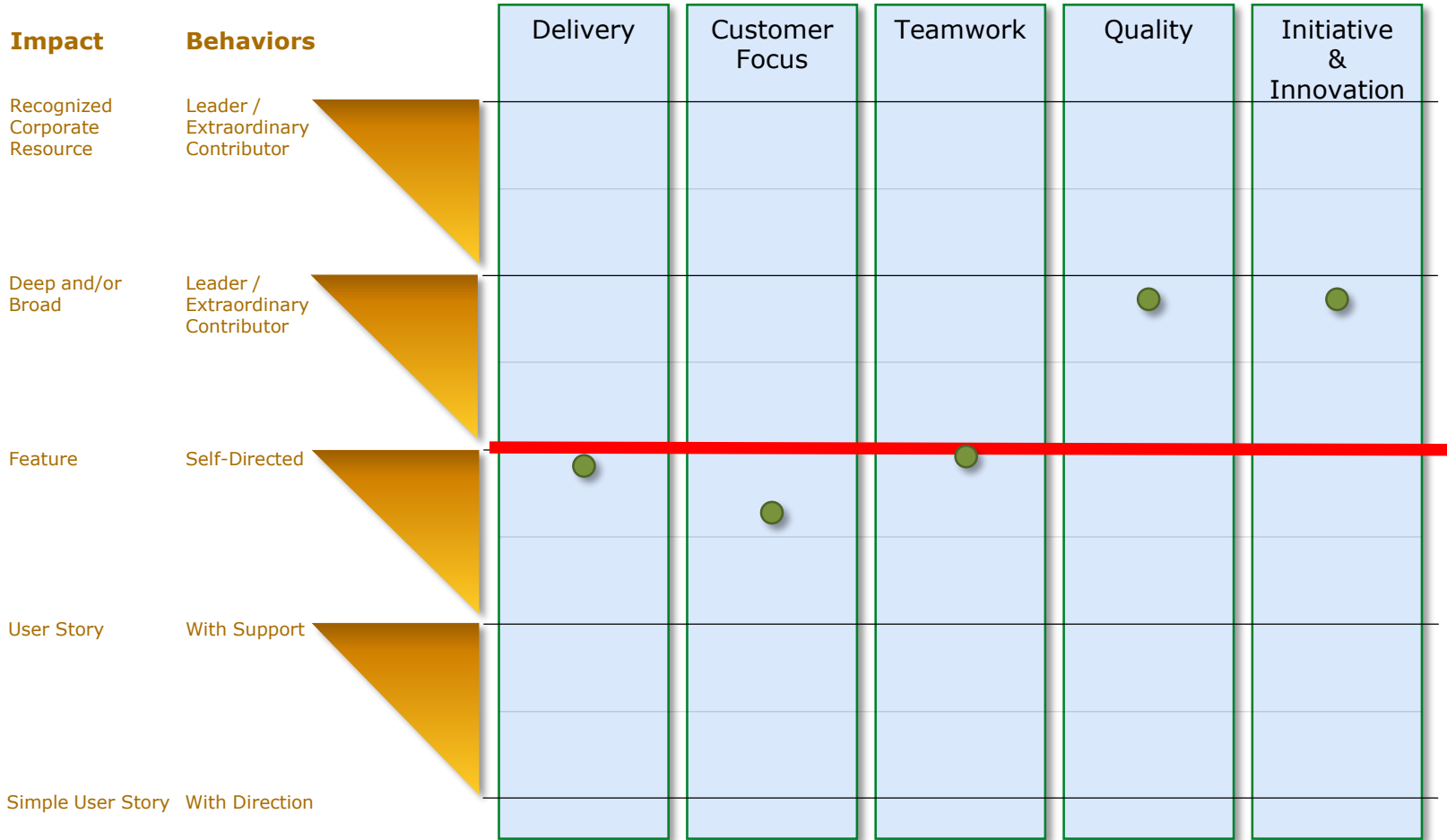
Paula the Perfectionist



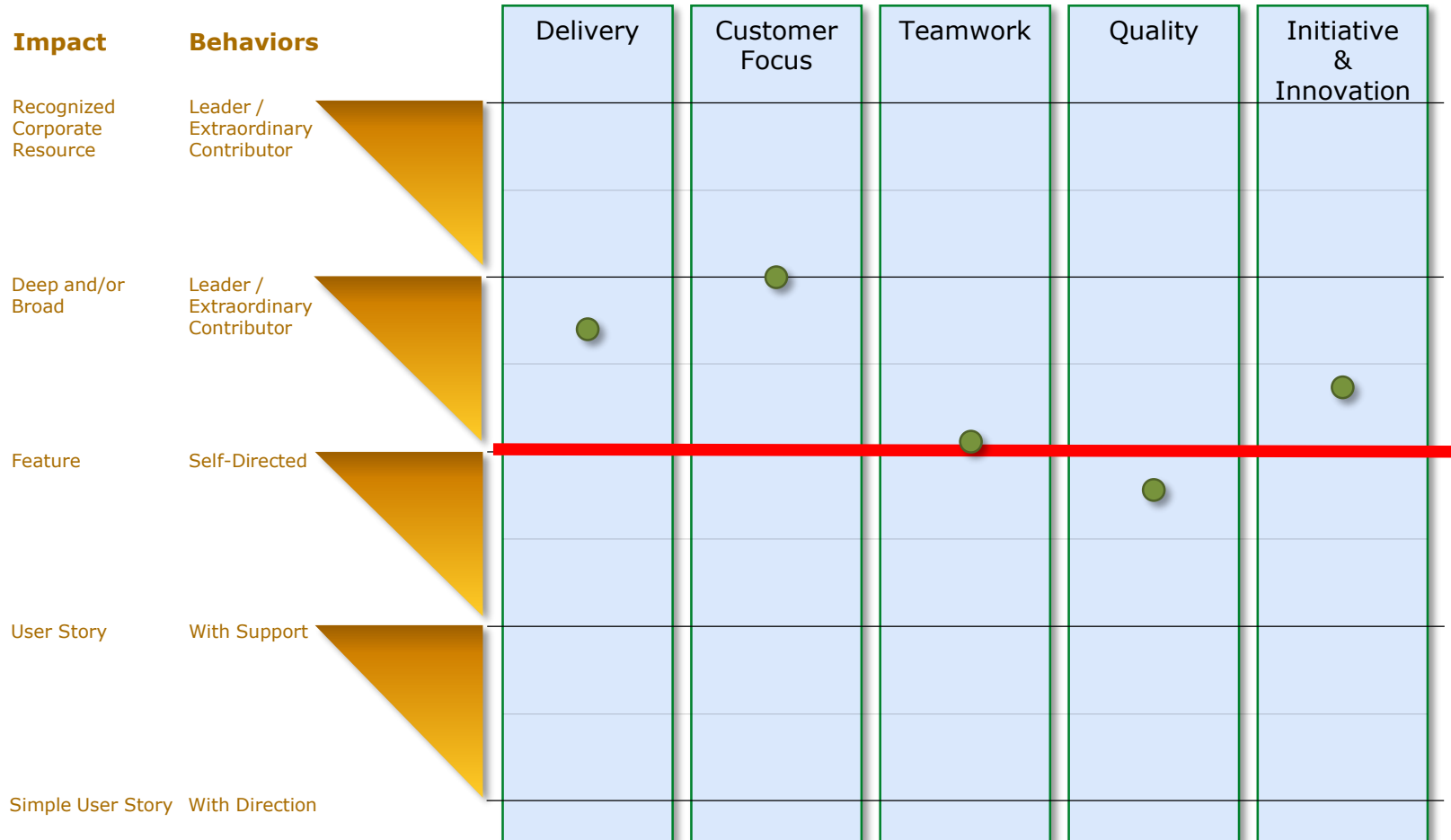
Tim the Enchanter...er Technologist



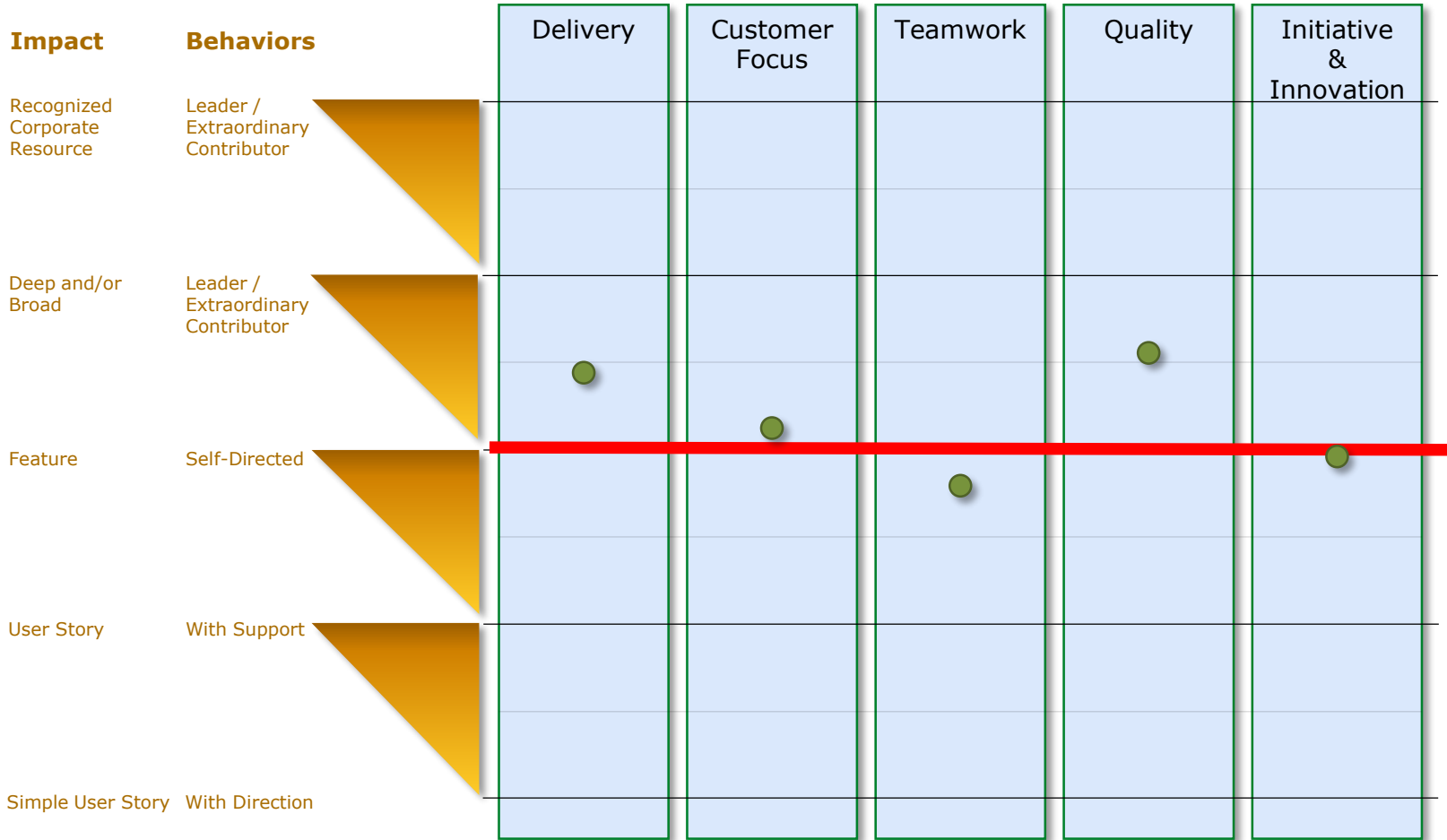
Alex the Architecture Astronaut



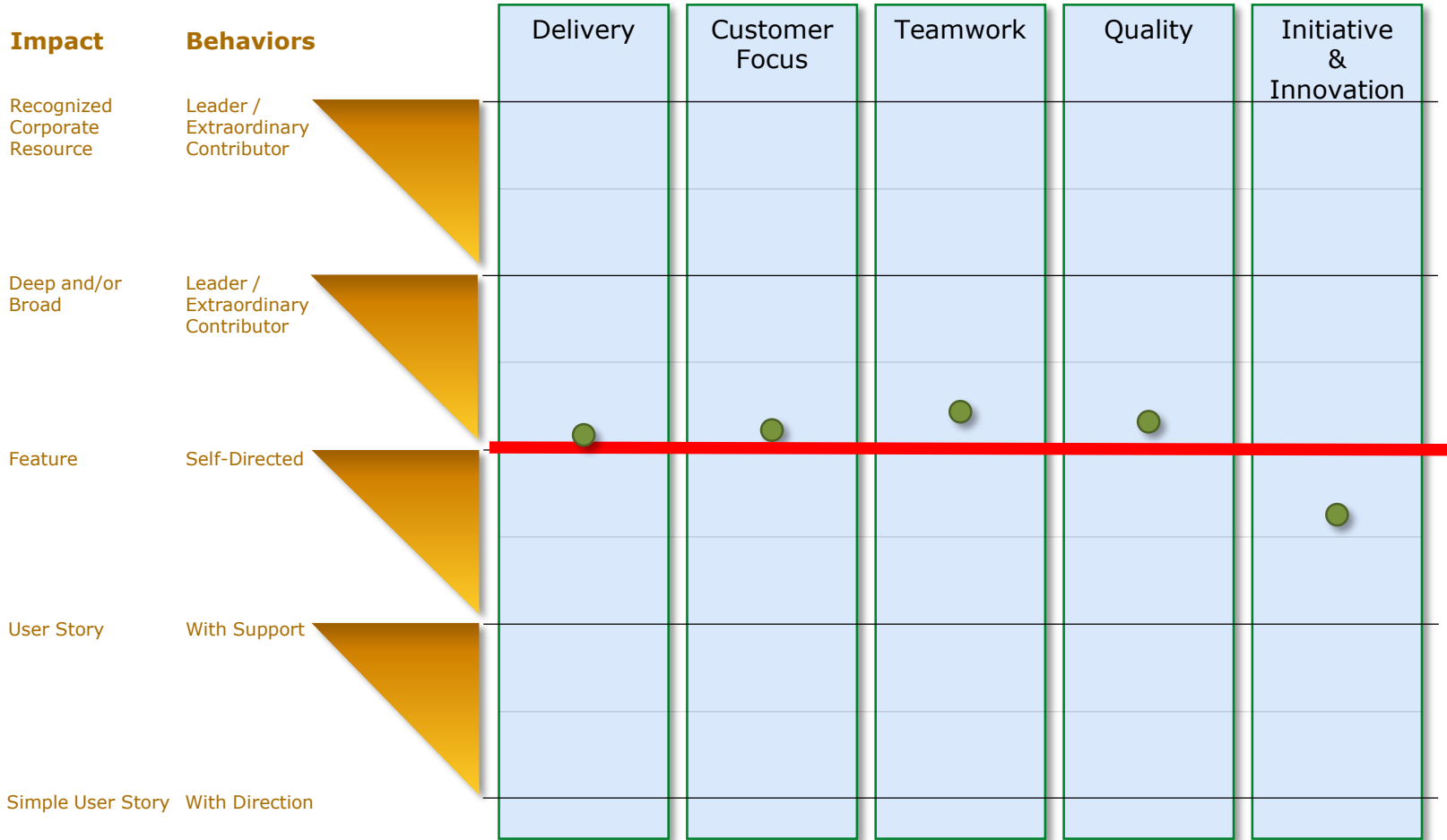
Doug the Domain Expert



Stan the Shy Guy

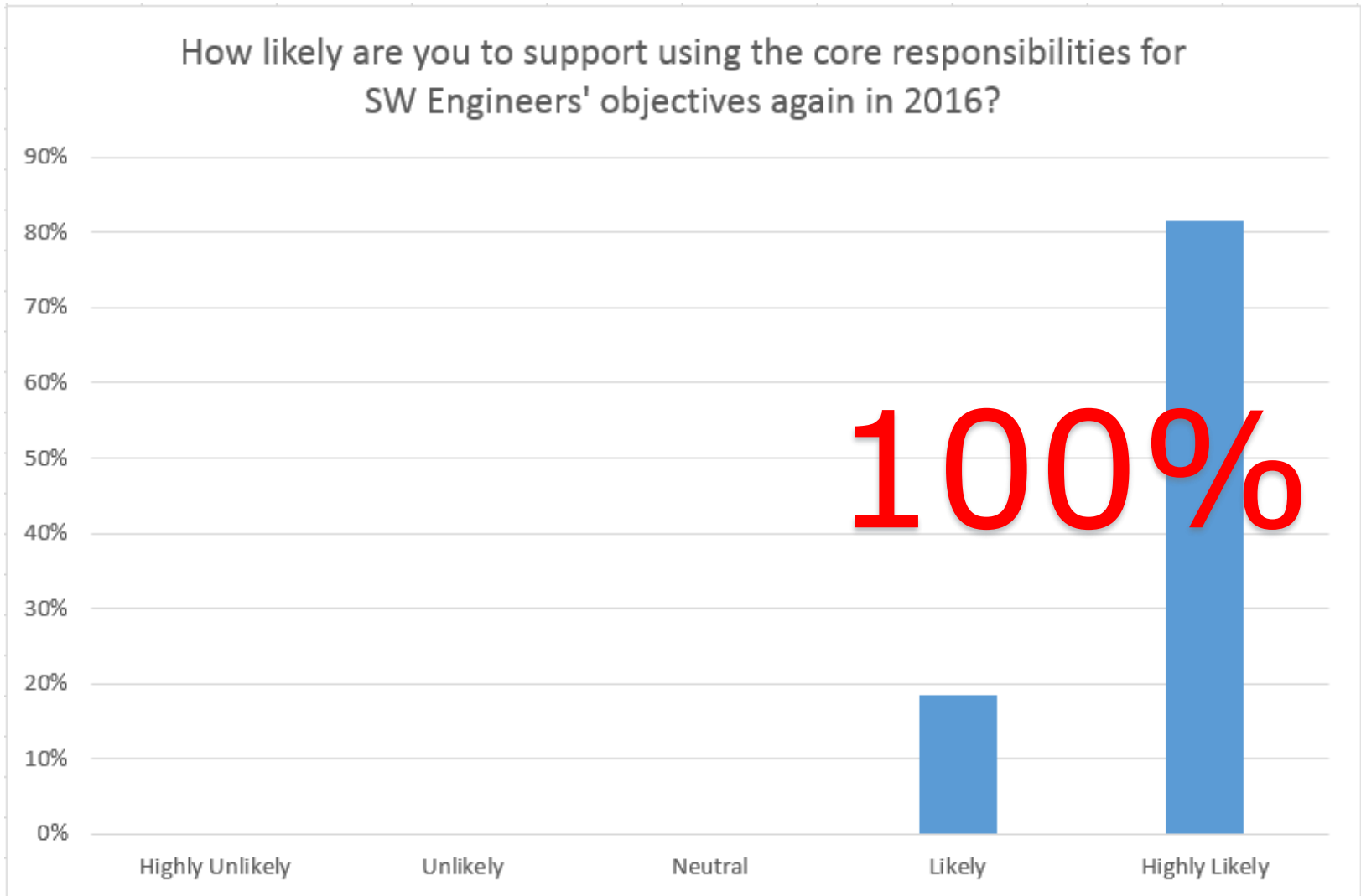


John the Journeyman

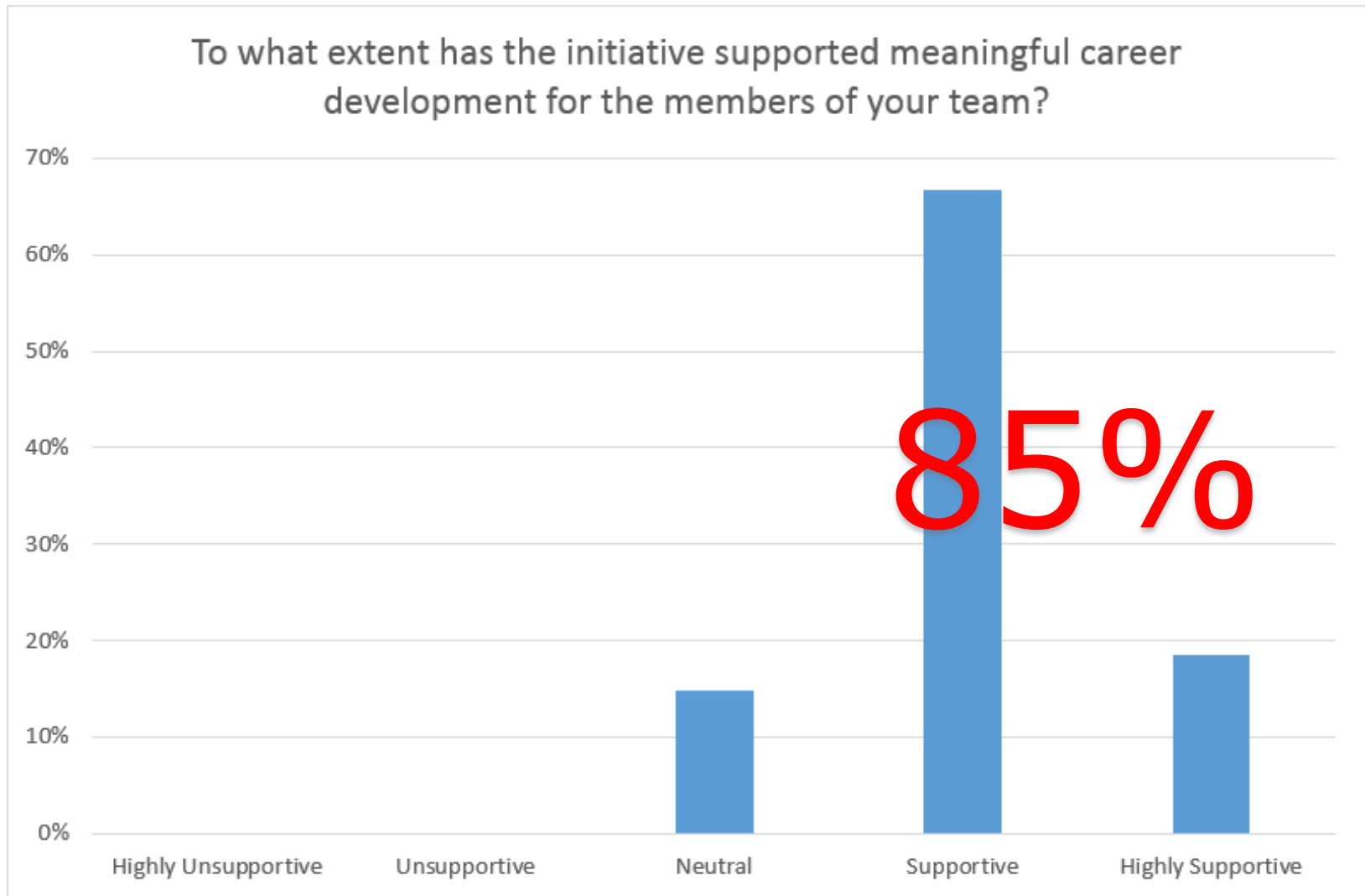


How do managers like it?

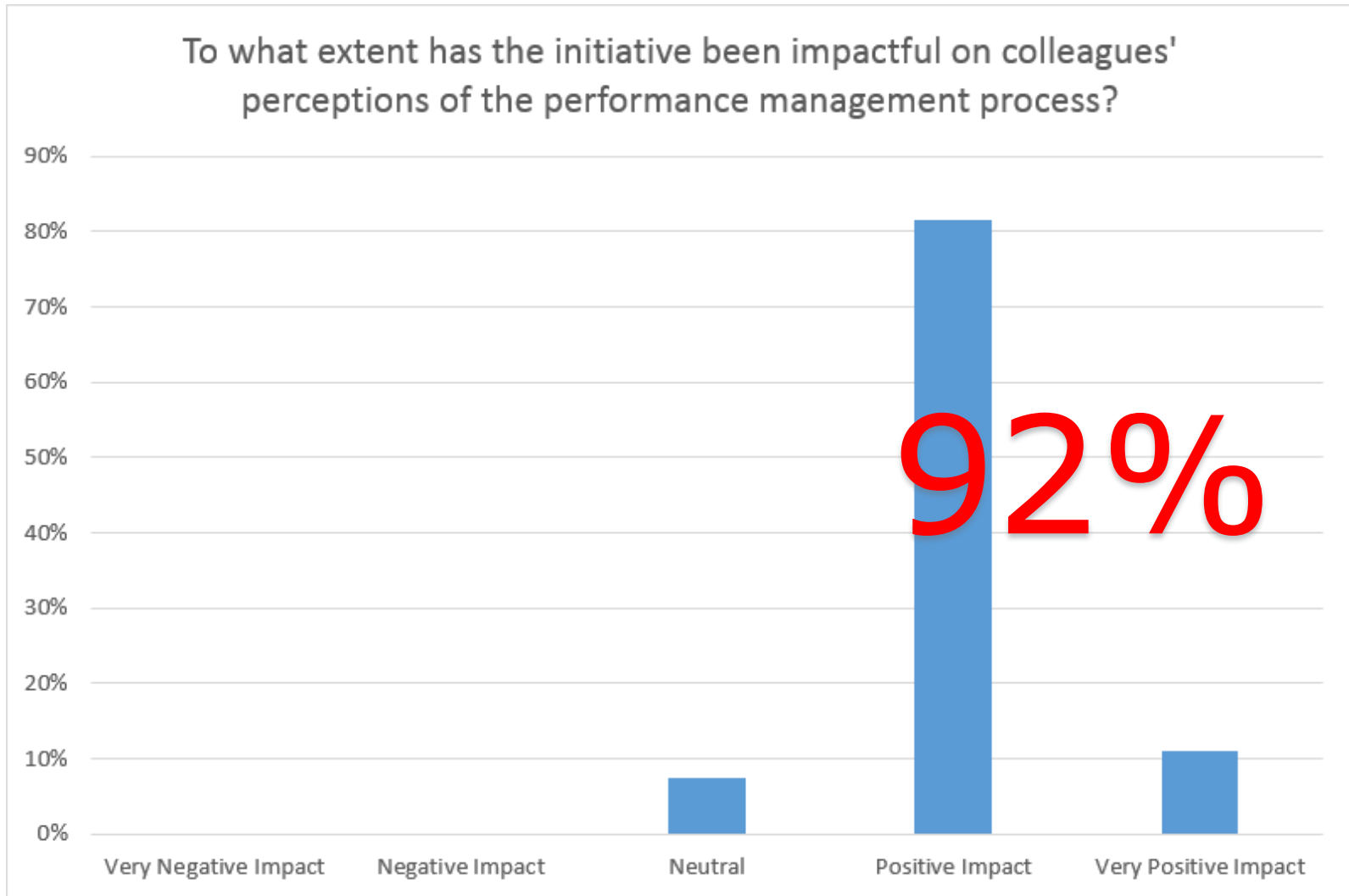
Manager Feedback



Manager Feedback

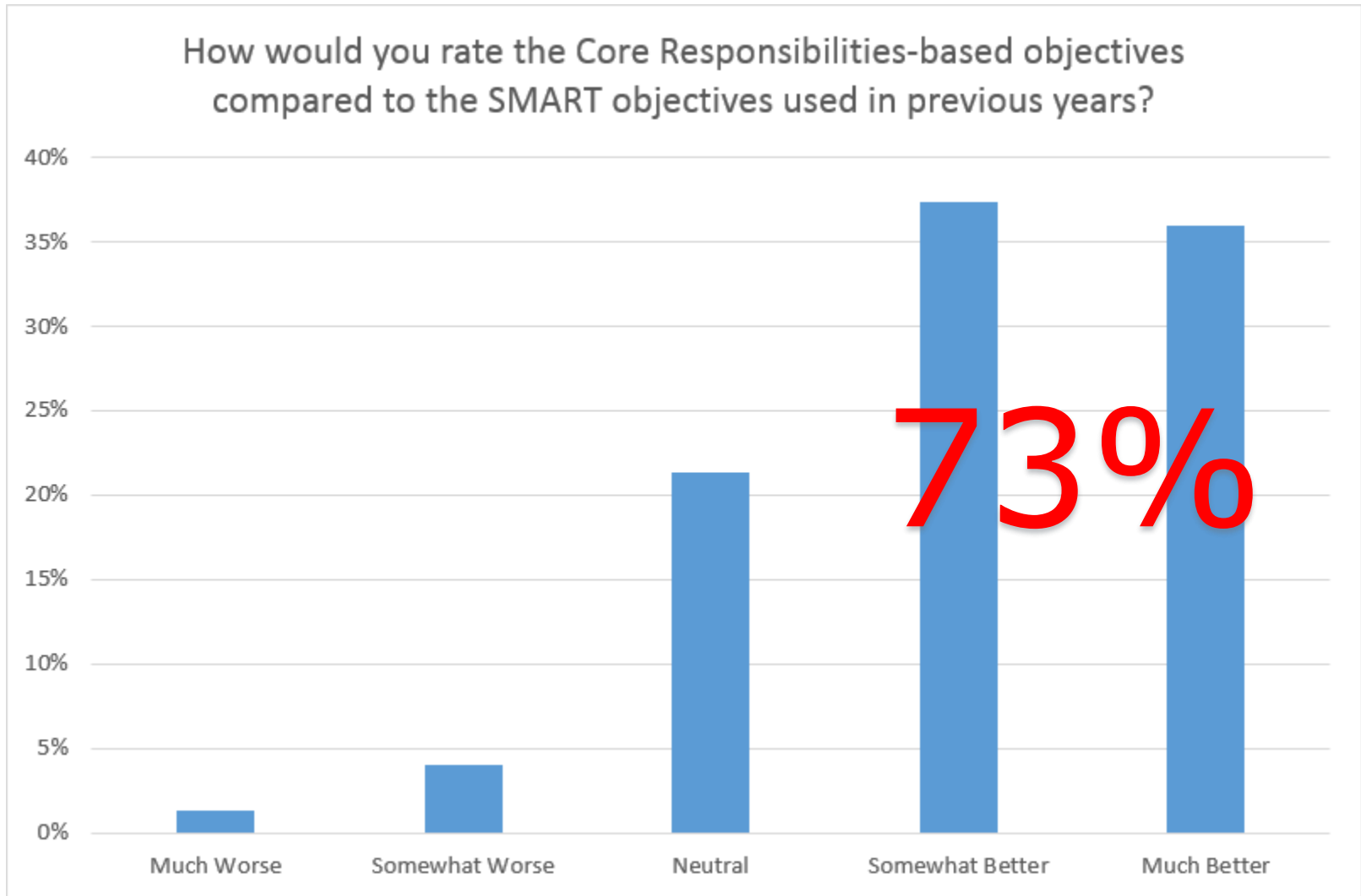


Manager Feedback

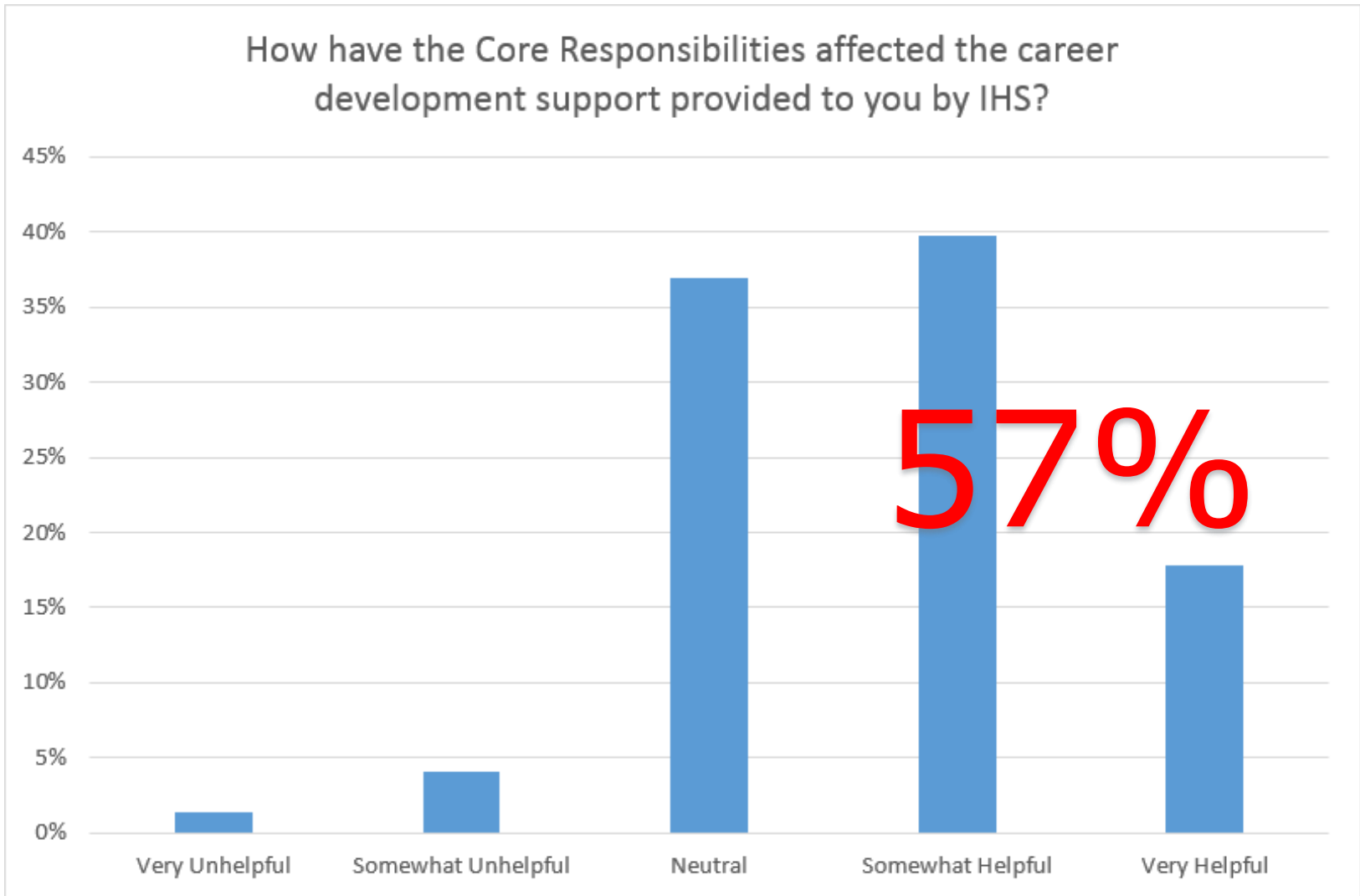


How do colleagues like it?

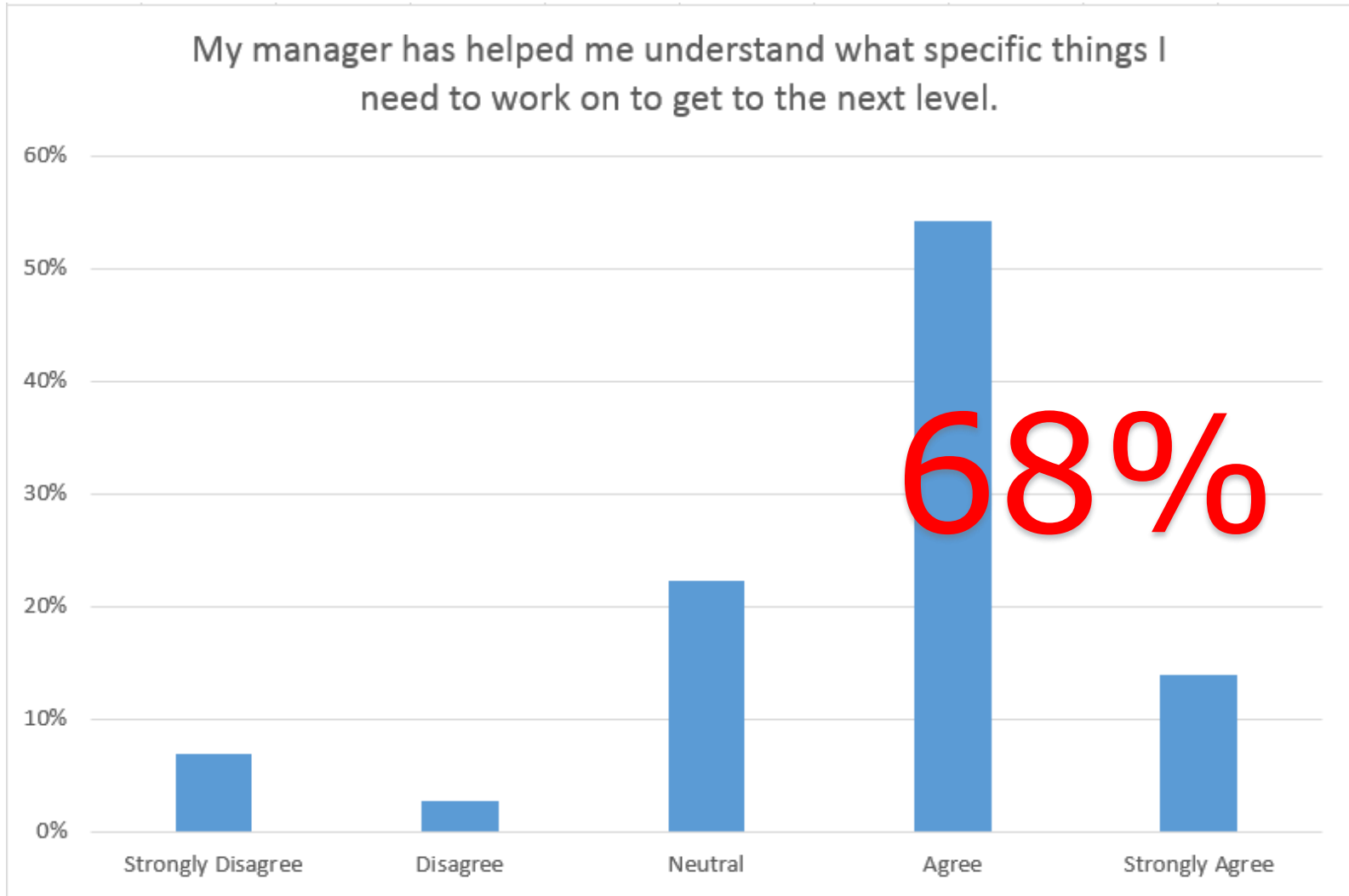
Colleague Feedback



Colleague Feedback



Colleague Feedback



Inspecting and adapting

Challenges integrating with HR systems

- HR rating model emphasizes “performance” over career growth
- Coarse-grained HR performance ratings
- Redundancies in paperwork
- Title inconsistencies across the company

Refining the Structure

	Behavior	Impact
Associate Software Engineer	<i>With direction</i>	<i>Simple User Story</i>
Software Engineer	<i>With support</i>	<i>User Story</i>
Senior Software Engineer	<i>Self-directed</i>	<i>Feature</i>
Principal Software Engineer	<i>Leader / Extraordinary Contributor</i>	<i>Broad and/or Deep Impact</i>
Senior Principal Software Engineer	<i>Leader / Extraordinary Contributor</i>	<i>Recognized Corporate Resource</i>

Beyond software developers

Development Management Job Summaries

Function	Development
Job Family	Product Development Management
Job Family Summary	<p>Management in the Product Development and Delivery organization are responsible for ensuring that business requirements for technology solutions are met in an efficient and effective manner. This includes:</p> <ul style="list-style-type: none"> Delivering feature rich and testable software products in applicable technologies and languages. Developing scalable and sustainable software products Understanding of the business and technology landscape Direct and indirect colleagues Growing and adjusting organization

Software Quality Assurance Engineer Job Summaries

Function	Product Development & Delivery
Job Family	Software Quality Assurance Engineer
Job Family Summary	<ul style="list-style-type: none"> Software Quality Assurance Engineers in the Product Development and Delivery organization are responsible for assisting in the implementation of product vision and strategy as defined by the Product Management organization. They accomplish this task by: <ul style="list-style-type: none"> Understanding technology and the target domain to support market needs and suggest potential solutions. Develop applicable manual and automated tests to help maximize software product quality. Testing software products from the domain user stand point using applicable technologies and tools to maximize testing efficiency.
Core Responsibilities	<ul style="list-style-type: none"> Lead delivery of programs and projects <ul style="list-style-type: none"> Work with stakeholders to set up for success, sustainability Provide resources Recommend appropriate strategic direction Make well-reasoned fiscal responsibility Demonstrate accountability Build high performing teams <ul style="list-style-type: none"> Hire amazing people Foster trusting, healthy delivery and quality Drive continuous improvement Cultivate team sustainable individuals Proactively address issues Identify and project capacity to be able to deliver Fuel aligned innovation <ul style="list-style-type: none"> Translate the company into team-level goals Create a shared understanding Encourage a culture of innovation Empower teams to achieve organizational goals
Core Responsibilities	<ul style="list-style-type: none"> Deliver technical solutions to create business value <ul style="list-style-type: none"> Skillful selection & application of appropriate tools and technology Productive construction of software solutions to business requirements Design and implementation of appropriate software tests Holding oneself accountable for delivery Partner with customer stakeholders to create business value <ul style="list-style-type: none"> Understanding customer needs and designing solutions to meet them Providing useful estimates to support release planning Agility - delivering highest value software in small increments Responsiveness – addressing urgent customer issues in a timely manner Collaborate with teammates to create business value <ul style="list-style-type: none"> Teamwork Communication Knowledge sharing Build quality into software from the ground up to create business value <ul style="list-style-type: none"> Writing customer-centric and risk-driven tests that help the team discover quality problems easily and early Workflow, integration, exploratory and performance tests Peer review Initiate team discussions about quality concerns and issues Take initiative and innovate relentlessly to create business value <ul style="list-style-type: none"> Initiative and proactivity Problem solving & resourcefulness Investment in ongoing skill development Contribution of new ideas and insights that drive business success

Shared Core Responsibilities

Delivery	Deliver technical solutions
Business Engagement	Partner with customer stakeholders
Teamwork	Collaborate with teammates
Quality	Build quality into software from the ground up
Initiative and Innovation	Take initiative and innovate relentlessly

Quality: Build quality into software from the ground up to create business value

- *Key contributions to consider:*

Developer	SQA
Clean code	Write and execute tests to detect issues early
Automated unit & integration tests	Workflow, integration, exploratory and performance tests
Peer review	Peer review
Reduction of technical debt	Be a quality advocate on the team

Do performance reviews have to suck?

Holy jitters!
What's wrong
Batman?

My
performance
review is today.



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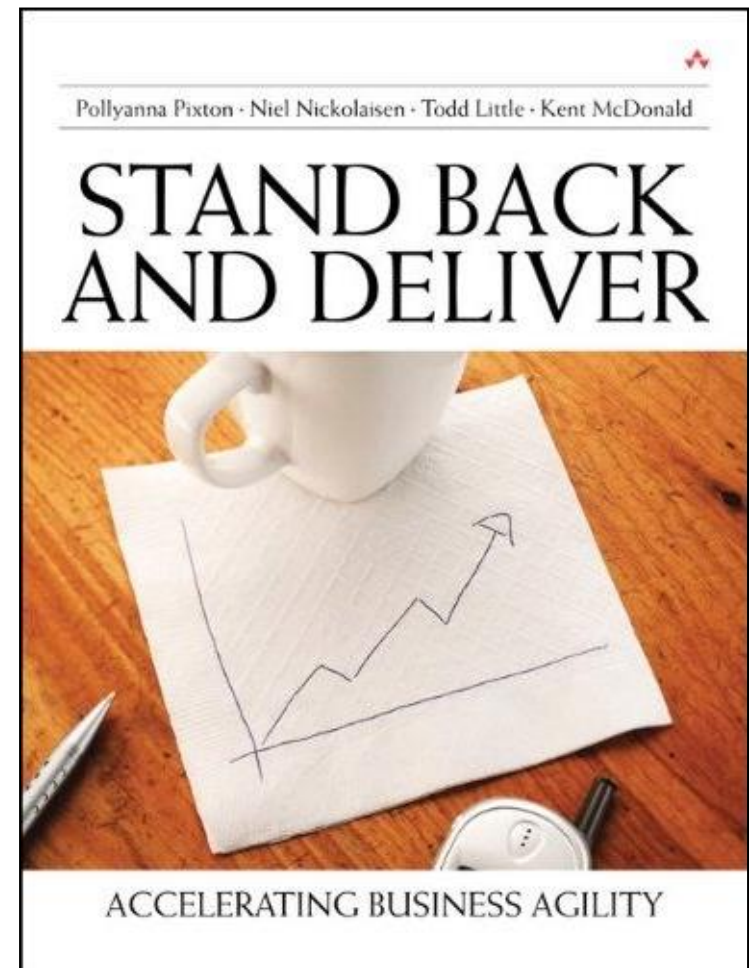
- > @toddelittle



- Andrew Tuttle

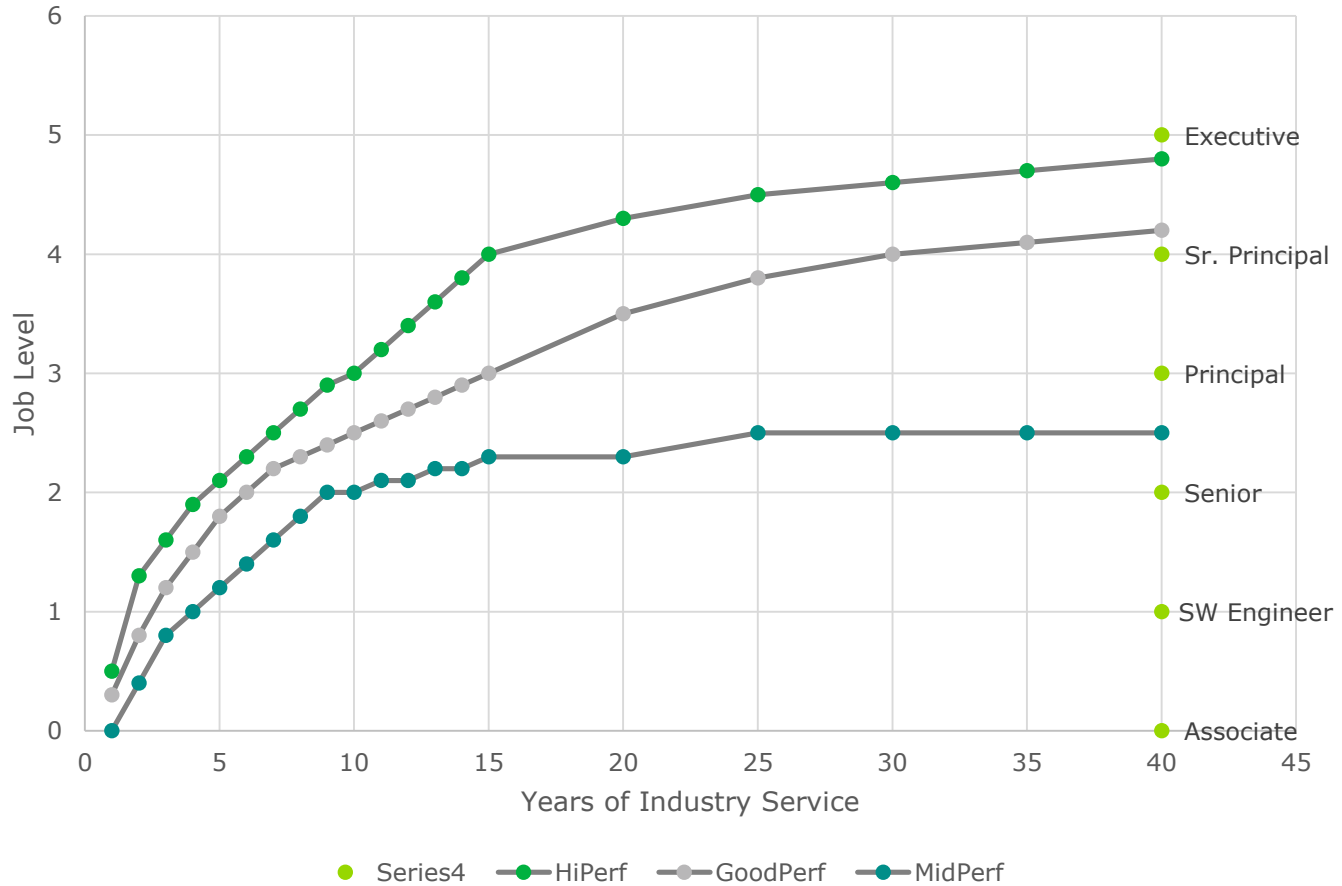
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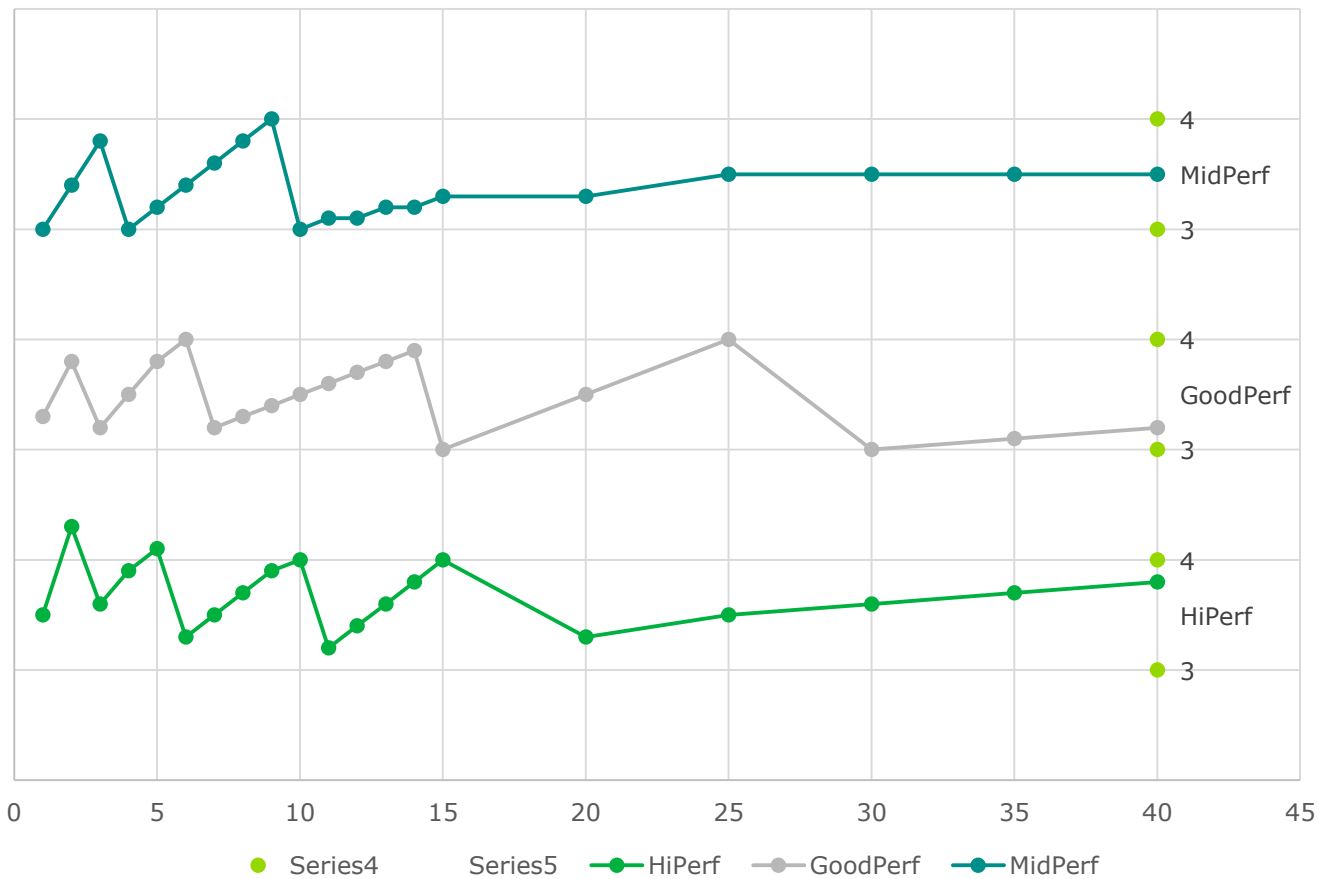


Questions?

Sample Career Progressions



Sample Performance Ratings



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