

What follows is the transcription of an interview between [Andrea Howe, co-author of *The Trusted Advisor Fieldbook*](#), and [Gary Jones, Chief Human Resources Officer at Grizzard Communications](#). This has been documented specially for SHRM 2015 attendees of “Leading with Trust: Five Skills Every Leader Must Master.”

ANDREA

Gary, you recently shared with me a story of upgrading—more like revolutionizing—the performance management process at Grizzard. Let’s take a few minutes to walk through the gist of it, as it’s such a great illustration of the five skills.

GARY

Sure.

ANDREA

I’m pretty sure it’s fair to see you know performance management pretty well.

GARY

It was my final project for my second masters, which was in performance management. I have done all the things you’re taught to do: KPI’s, processes, tying performance management to coaching ...

ANDREA

Yet you weren’t happy with how it was being implemented at Grizzard.

GARY

Not at all. After 30+ years as an HR professional, it was clear to me it was not having the type of impact it could/should be having. I had a hunch I wasn’t the only one feeling that way.

ANDREA

And you had an idea.

GARY

I did. I thought, what if we got rid of the idea of “final grades” and top-down approach? I was strongly influenced by *Helping People Win at Work* (a book written with Blanchard and Garry Ridge, the CEO of WD-40). I set myself a goal to design something Associates and Managers said *matters*. Something that was *about them*.

ANDREA

So you took the **RISK** of raising it with your HR Director and your Executive Team. I believe you said something like, “Does anyone else think this process sucks as much as I do?”

GARY

I did ... and they did. I also took a bit of a personal risk because I’m a pretty confident person, and yet the idea of setting aside all that was “holy” (and comfortable) and moving in an untried direction of bottom-up instead of top-down felt pretty risky. I mean, the idea of “no final grade,” “no over-all assessment” felt really uncomfortable at first.

ANDREA

The next step was to **LISTEN**. You had to figure out how to discover what Associates and Managers would really use ... *how* to make it a bottom-up versus top-down process. Through multiple focus groups you spoke to roughly two thirds of the organization.

GARY

We did. And we discovered three important things: (1) Associates wanted more face time with supervisors, (2) more intentional efforts for freedom to grow and develop in career-enhancing skills (not just job performance), (3) and more frequent f/b not an annual exam.

ANDREA

I know there was a little personal stretch for you as well.

GARY

There was. Listening called for some real discipline on my part. Sometimes I was better at it than others. Clearly I had the most education on performance management...and had already taken some big steps in diagnosing the key issues, but I had to constantly remind myself that what I *didn’t* have was a systematic discovery of what the *users and key stakeholders* wanted and needed. If you have the mindset of an internal consultant, you know that even your best idea may not be the best idea for these key stakeholders. Gaining their perspective and ideas was critical to our success.

ANDREA

Now comes the **IMPROVISING** part—since you were completely going off script as far as the overall performance management process. You had to figure out how to write a new script for everyone.

GARY

We did. We had to figure out how to tie all of this together. We created a system that the associates originate—they ID the top 5 (max 6) things that will have the company/client win if they do them well. It’s much more than KPI’s. They have to articulate, “At the end of the day, here’s how I help the team—and our clients—win.”

In the new document, there's a section after that on what you want to learn and grow—a minimum of one, and preferably two growth points that they self-identify.

ANDREA

And then you have a section that links to Grizzard culture—like treating each other with dignity and respect, being solution-focused. These aspects are not negotiable.

GARY

Right.

ANDREA

And you created a process that doesn't send the document up line two levels, with a cc to HR. There's no cc to HR. It's a living doc between Associate and supervisor.

GARY

Yes. Our team basically started with a clean slate. We knew what hadn't worked and we had the hopes and expectations from our key stakeholders. So the whole project became a series of improvisation exercises as we played with concepts and ideas. I'm a relatively strong J on the Myers-Briggs. So I found myself frequently having to remind myself to use the improv skills—especially “yes, and.”

ANDREA

My favorite part of your improvisation is it resulted in what you call an “Owner's Manual” that's 3.5 pages long. And it's not short on humor—like the opening paragraph that says, “If you have any of the following symptoms while using this process (such as feelings of being overwhelmed, confusion, not knowing where to start, headaches, or dizziness), please consult a member of your HR staff immediately for quick relief.” And there's more.

GARY

I had a ball writing that owner's manual.

ANDREA

You also made a lot of effort to **PARTNER** with others at Grizzard throughout the process. You developed mission statement that was labored over—key to change because it becomes a reference point. You went back to focus groups to their input on it, as well as a draft design for the overall process, as well as final development and rollout.

GARY

True. The development process was a real partnership and the new performance management process depends on partnership.

ANDREA

A partnership that's initiated by associates in Dec when they fill out their worksheets and send them, along with meeting invite, to their direct manager.

GARY

Yes, the first meeting is about planning for the new year. Meet face-to-face with supervisor.

ANDREA

Then by end of April, associate checks on document—here's where I am so far—and updates, with calendar request. Again in August. Again in December.

GARY

At end of year, supervisor informally picks 2 – 3 key stakeholders to get f/b—did you get what you needed from Gary? What best advice do you have? Anonymous.

ANDREA

And it comes to HR at the end of the year *for the first time*. To date, HR only carries reminder functions.

GARY

Yes. In most performance management systems, HR drives the whole process with management in a very top-down fashion. Changing this to a true partnership—driven from the bottom up—called for a lot of trust in our people. Yet, if we wanted our people to act like true partners in this process, we had to treat them as true partners.

ANDREA

And as far as **KNOWING YOURSELF?**

GARY

As an organization, we know our values and strive to live them every day. This new system is far more consistent with them than anything we've had in the past. Personally, a huge key to success was my awareness of these trust skills and the struggle to put them into action...as opposed to building a bottom-up system using a top-down approach.

ANDREA

You're half-way through your first year with the new process. What kind of feedback are you getting?

GARY

We're making real progress. We've got a lot of smiling faces around the office.