

# HOW TO USE THIS GUIDE

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## What this guide is about

Study after study has shown that clear expectations improve employee performance. But creating goals 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 any kind of work, even for white-collar and other hard-to-measure positions.

This guide is designed to help you learn how to create employee goals 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.

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## 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 performance measures for his/her position.

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## 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 40 sets of example performance measures, a summary of the key steps of the process, and worksheets to help you create your performance plan.

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**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 results of your position.
- Create measures for each result.
- Set goals for each measure.
- Plan how to track each measure.□

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**How to use the guide**

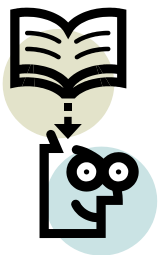
Your Situation	What To Do
You are helping others to develop performance measures.	<ul style="list-style-type: none"><li>• Learn the techniques before trying to help others learn them. Use the exercises and your own job as practice material for learning the skills.</li><li>• Guide the employees and managers 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.</li></ul>
You are completing this guide alone.	<ul style="list-style-type: none"><li>• 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.</li></ul>
You are in a workshop on Performance Measurement.	<ul style="list-style-type: none"><li>• Complete the exercises as directed by your facilitator.</li></ul>

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**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.

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**What to do next**

1. Read this entire guide and draft a performance plan, including results, weights, measures, goals 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.
  - If you are using GoalTutor, an online or CD-ROM-based performance planning workshop, complete the exercises as directed by the narrator.
  - If you are in a live workshop, ask your facilitator for help with any of your work.
2. Once you have completed your draft, meet with your supervisor to discuss and finalize your plan.