XM Performance: Leading through others, quarterly counseling

Process for Quarterly Semi-Formal Performance Reviews

Prepare:

1. Develop Score Card Measurements for this position that tie to the business objectives of Revenue Growth, Costs Reduction, People Development, etc.
2. Take notes for yourself and outline your perception of their performance.
   a. What are they doing well? (Always start here)
   b. Key areas that **need improvement.**
   c. Capture their ideas for improving the business.
   d. Set measurable quarterly goals.
3. Set the time for the appointment, let them know that you will be discussing the topics in #2 above. Ask them to write out their ideas for a-d, 45-60 minutes should be fine.

Action:

1. Review the **business DNA** (Purpose, Values, Vision) and highlights of business plan. Outline reasons for any upcoming changes.
2. Facilitate conversation around the four topics in #2 above. Take notes through the discussion.
3. Collaboratively create a **plan of action**. Document what they commit to.
4. Let them know that you will be providing them with a document that records the highlights of the conversation. You will ask them to improve it for accuracy.
5. Once the final document is agreed on, **sign it and date it together.** They are committing to their best efforts to reach the goals; you are committing to assist in achieving them.

Follow up:

Use this document and the key measurements to have 1-1 checkup meetings for progress on their score card 1 or 2 times per month. The real leverage comes when you have the second and third Quarterly Business Review meetings working through obstacles, setting up opportunities, and holding them accountable to lead and produce results through their teams.

Crystal Clear, 2025 Q1 Review (Sample)

Making Positive Progress:

- Ability to learn, connect, and grow are awesome. We will continue to invest in you as long as you keep driving towards key results.
- We are making great progress in taking tasks off the list of “Things only Rick can do.”
    - Networking and finding the right prospects to bring to our monthly breakfast event
    - Tracking email data, driving improvements in the process and content
    - Finding opportunities to bring people to us (Two mixers at the Office)
    - Negotiating for a speaking engagement at Business Insight Series
    - Managing the website upgrades with minimal guidance
    - Discovery and experiments with new digital tools (Meet up, etc.)
- Our monthly breakfast is making great progress in attendance and high-quality experience
- Helping me stay on task with my work in the midst of our busiest Q1 ever
- Work ethic is so strong, able to handle a lot of freedom from structure and control and still deliver

Need additional attention:

- Don’t get bored with the details, we need your focus on completing our routine tasks with exceptional quality every time.
- Keep pushing yourself to be able to talk about what we do at a higher level than last year.
- Activity does not equal accomplishment, keep maturing and evolving your work to produce the key marketing results we need for growth in 2025.

Key Xcelerator Goals:

Our goal this year is to develop you into a potential Director of Marketing for 2025 and beyond. Several deliverables will prepare you and determine your readiness.

1. Monthly Breakfast groups: 10 new people every month
2. Email lists: Breakfast group goal 220, company goal 450. Due June 30
3. 15 meetings with Qualified Prospects for Rick, breakfast, lunch, coffee, focus on Monday and Tuesday afternoons, feel free to set the dates at the office
4. Develop the Logistics plan for New Delhi trip
5. Close 5 new speaking engagements opportunities
6. Begin outlining the playbooks for M&E administrator, guide your replacement