

Drop the questionnaire and jump just straight into development

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The trend is clear: The classic questionnaire-based leadership evaluations are being challenged and, in many places, they are on the decline. 58 percent of managers in an international study believed that performance measurements are not worth the time they take (see note 1, 2, and 3 below), which is the same thing I am seeing when more companies are starting to ask questions about the common ways of measuring a leader's performance. Are we actually measuring what creates the most value? Are we pointing people in the right direction with respect to the general goals? Or are our big, complex measuring systems actually just expensive systems that mostly contribute to frustrations and complicated overviews that we don't act on anyway?

The question that more and more organizations are asking themselves is: How can we make our leadership evaluations clearer and hence more usable with respect to management development? One of the ways we can do this is to think in terms of new ways of evaluating - e.g. through dialog.

Let's skip the grand data analysis and jump straight to the development

In the classic quantitative leadership evaluation, we use vast quantities of resources to prepare analyses, send out questionnaires, ask the organization to answer them, and then wait for results that we can then analyze and send out to the organization. Only then does the development (perhaps) begin. Now what if we just jumped directly to the development?

This was the ambition in Skive Municipality, where 120 leaders and 4,500 employees have just held "Development Dialogs", which replaced their quantitative leadership evaluation. Today, the leadership evaluation is void of numbers and graphs. Right away, after a brief preparation, leaders and employees start talking about what is important to them with respect to leadership - and right away, they talk about what they should do about it. With these simple tools a lot of changes are made to the common way of performing a leadership evaluation:

1. We are now directly talking about what is important to us, without big preliminary costly analyses.
2. We are talking as a group without anonymous comments.
3. We are working together to find a solution - it is not just the leader's responsibility to establish good management and well-being - it is something we have to do together.

By performing the leadership evaluations through a controlled dialog which involves the discussion of 1) what is actually important to all the employees with respect to management and 2) what needs to be changed, through clear speaking and listening positions, with everything written down to be recapped later. Even now we have made a quantum leap: Invitation for evaluation dialog -> Jump directly to talking about solutions.

In a different organization, an employee said the following after a leadership evaluation dialog: "It is definitely easier for me to be able to say things to my leader after having this dialog. If there is something I think she needs to do better, well, the dialog lets me know that it is OK for me to go and say it, and I would not have done that before." The point is that the actual dialog, beyond evaluating leaders, contributes to establishing trust towards each other.

Some departments will consist of many employees, and so the dialog process must be adapted so that departments with 5 employees as well as those with 80 can manage to provide the leader with feedback in a short time span. This exercise has just been carried out in Skive Municipality, where all leaders and employee representatives responded: "YES" to the question: "Did you have the opportunity to talk about what was important to you with respect to management and satisfaction?" in the subsequent evaluation of the concept. This is a very clear indicator that it is possible to get straight in to the core - even in a very diverse organization with many different kinds of leaders and employees.

There are of course several concerns associated with the shift from using a questionnaire to using dialog as the primary tool. The two most frequent are 1) that leaders are concerned that the employees will not be honest in the dialog and 2) that you cannot do without the grand data overview. Let us try to delve into these two impediments:

1. Impediment: Talking to each other requires trust - what if we don't have that?

This is one of the concerns I most often hear from leaders who are considering taking the plunge. We would like to start by talking to each other about good leadership and cooperation instead of putting check marks on an anonymous questionnaire, but do we do not dare.

In connection with the evaluation, it is inevitable that different feelings, like insecurity, will arise when having your leadership evaluated - or entering into dialogs on difficult subjects as an employee. Therefore, it is critical that security is established for the evaluation from before it takes place. There are several things we can work on:

1. That the leaders send a clear signal to their employees that they will take the development seriously after having received feedback. This will often lead to the employee wanting to participate in the evaluation and hence also answer honestly (see note 4 below)
2. That everyone has a clear picture of the subsequent process and follow-up since it must be clear for the employees why they need to put in the time and energy to answer honestly (see note 5 below)

As a minimum, the leaders must communicate the evaluation in a constructive way at a staff meeting in preparation for the upcoming evaluation process. The purpose here is for the leader to provide insight into why he/she is personally looking forward to the process - and how the follow-up will take place.

A leader I worked with established trust in the evaluation process with a very clear example, where he presented a short anecdote to his employees: *“I once received feedback that I was too controlling in my management. First I thought: NO! That certainly isn’t true! I felt that they were criticizing my personal leadership style - and that was hard to accept. As time went by, I started being able to see that this could be something I should look into more thoroughly. Over time, more employees would increasingly go quiet when I asked for input. After all, I was the one that set the course and made the final decision. It occurred to me that I needed to find a balance, where I could manage while being supportive. This is feedback that really changed me as a leader, and I can now see that it has changed out cooperation for the better. I need feedback on an ongoing basis to be the best leader who can guide us forward, together. I want to be the good leader you deserve! Help me to become that leader together with you.”* This not only informed the employees that they should answer honestly and share their opinions during the dialogs on good leadership and collaboration - it also conveyed to them that this was a leader who really meant what he was saying!

2. Impediment: Can we do without the grand data overview?

In most cases, top management loves numbers because they give them a sense of overview and control. However, this is a false sense of confidence if the numbers do not reflect reality in the organization. With a qualitative body of data obtained through dialog, you get a more in-depth picture of what is actually happening in the organization right now. The common organizational data from the qualitative evaluations is built on the basis of data concerning general themes in the individual dialogs, which are then reported from each department. If you still want to have central figures, you can also choose to incorporate individual, brief scale-based questions into the question framework, e.g. “How good is your leader from 1-10”? What you can otherwise conclude from a classic qualitative overview following the dialogs is which themes are prevalent in the organization. Here, you can choose to design the evaluation so that the themes provide an expression of which strengths and challenges exist in management - not on a scale, but just as headlines. These headlines can be then used by the organization for making decisions concerning which themes should be worked on going forward so as to develop leadership, cooperation and satisfaction. Can we do without the nuances and “make do” with the overview? Do we dare to let go of the illusion of control that the annual quantitative management evaluation, with its fixed question framework, gives us? This is a central question to ask yourself if you are considering moving from questionnaires to dialogs.

Can we jump directly from numbers to dialog just like that?

Organizational cultures are different, and for some, moving from numbers to dialog would represent a far greater leap than for others. In such cases, it goes without saying that the existing culture must be examined. However, the experience we have thus far supports the notion that it is certainly possible. When you are about to start on your qualitative evaluation, you can start with:

1. Purpose! Which decisions would you be able to make on the basis of the evaluation? What should we actually use our leadership evaluation for? Should it contribute to a grand overview of all nuances in leadership across the management chain at different levels? Should it provide a strategic overview of how competent our leaders are at supporting and implementing our strategy? Is it a strategic development tool for the organization which should contribute to prioritizing resources in HR for the next development activities? Or is it a personal development tool that should generate learning and development with individual leaders? For the leader groups? Contribute to trust between leaders and employees? Ensure control by following up on whether leaders do what is expected of them? Or something else?

2. The method: If you want to get away from the questionnaire, consider which qualitative method best fits our organization. Perhaps we shouldn't beat around the bush and just put good leadership on the agenda between leaders and employees in a joint dialog. Perhaps the right method prior to this is to have a person observe the leader in his/her day-to-day management in order to be able to use this data together with the dialog and be able to draw examples from this. Perhaps the right form consists of interviews of employee and leader groups (where the leader that is being evaluated can choose to be present). Or perhaps the solution for us consists of ongoing whiteboard meetings, where we talk about everyday leadership and cooperation.

So let us consider if we can drop the big, expensive and complex leadership evaluations in favor of evaluations that get closer to the leadership while using fewer resources and which generate greater leadership development and results, with lower complexity, for the cooperation in the individual department.

FACT

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On a day-to-day basis, Stephanie works with many different evaluations and advises companies about how they can structure their evaluation processes so as to create the best foundation for improved behavior on the basis of the evaluations. Typical customers are large private and public organizations, where work is performed with qualitative and quantitative forms of evaluation. Stephanie publishes regularly on leadership evaluation and contributes to the knowledge development in this field.

Notes:

1. (Nabaum, Barry, Garr & Liakopolus, 2014)
2. Denmark is not the only place where this trend is appearing - in another international survey, 89% of the companies responded that they were either in the process of or would change their performance management system within the next 18 months (Sloan, Tsuchida & Parent, 2015).
3. Furthermore, a survey performed by HK found that 40% of the 500 respondent managers considered leadership evaluations to be a useful tool for their own development only “to some degree” - whereas 11% answered “to a high degree”.
4. (Bracken, Timmreck, Fleenor & Summers, 2001)
5. (Haustein, Facticeau & Schmidt, 1999; Woehr & Huffcutt, 1994)