Job well done? Better ways to assess tech employees

As IT responsibilities evolve, managers strive for better ways to measure techies' contributions

Mary K. Pratt

April 1, 2013 (Computerworld)

How many lines of code did you write this quarter? By how many hours (or days or weeks) were you behind in delivering your latest project? Was it over or under budget, and if so, by how much? How quickly were you able to get your last program to testing?

For many years, those were the metrics by which IT employees were judged when their performance reviews rolled around.

These days, IT managers acknowledge that writing fewer lines of code can be more efficient, that time and budget creep can be acceptable if it means getting a project done right the first time and that quickly moving a program to testing doesn't necessarily indicate a job well done.

What's more, as IT shifts from being a service provider to a strategic business partner, managers are looking for a different skill set from their workforce.

"What we value is high performance of our services and strong execution on our projects," says Joel Jacobs, vice president and CIO at The Mitre Corp., a not-for-profit science and engineering organization in Bedford, Mass., and McLean, Va.

Jacobs is clear about his expectations, and he wants to make sure each of his IT staffers is working to those objectives. The question now: How to determine if that's the case? If the days are gone when technologists were measured on straightforward, quantifiable metrics that reflected the heads-down development-focus of the typical corporate IT department -- what should replace those metrics?

"We have to decide what we measure, and that's true in any part of the organization, not just IT," says Jacobs.

As part of the current overhaul of how Mitre evaluates its workers, including those in IT, the company evaluates the impact of what people produce alongside more traditional measures such as being on time and under budget. "What we're trying to measure is

Importance of informal feedback

How important is regular, high-quality, informal feedback to your success in your role?

Extremely important 49%

Important 44%

http://www.computerworld.com/s/article/print/9237928/Job_well_done_Better_ways_to_assess_tech_employees?taxonomy...
performance against our plans for existing services and new capabilities," Jacobs explains.

**Wanted: Better IT assessment**

Throughout the industry, managers like Jacobs are wrestling with the question of how to best measure and monitor tech workers' job performance in the face of evolving responsibilities.

Consider the findings of an October 2012 survey of 3,500 IT professionals and leaders by TEKsystems Inc. The IT staffing and consulting firm found that only about half of the respondents in either group say their managers are great at performance management.

"[Performance management] is definitely challenging, and that's why you see it not happening," says TEKsystems marketing director Rachel Russell.

But any organization that wants to maximize the value of its workers will want to make sure assessments do, indeed, get done, Russell says. Performance management, of which evaluation is an important part, is "basically how an organization leverages people to achieve what it's trying to achieve," she says. (See [Key IT performance metrics](#) for specifics.)

"If you have a set of goals and if you only ever talk about them formally once a year, as many companies do, you're not going to be set up for success," Russell explains. "The more you talk about them, the more ingrained they are with your staff and managers, and the more likely you are to achieve those goals."

The TEKsystems survey found that 83% of IT professionals say that formal feedback is either extremely important or important to their success. About half of employees say they receive formal feedback once or twice a year, with 37% of IT professionals reporting that they get formal feedback on at least a quarterly basis.

Survey respondents say they value informal feedback even more, with 93% of IT professionals agreeing that regular, high-quality informal feedback is important to their success.

Yet, only 14% of IT professionals and 12% of IT leaders say that informal feedback is given when performance deviates from expectations, according to the survey. Moreover, 15% of IT professionals and 8% of IT leaders say that informal feedback isn't given at all.

And when informal feedback is given, it's not always very good; the survey found that only 43% of IT professionals and 49% of IT leaders rate the quality of informal feedback as excellent or very good. Some 27% of IT professionals actually rate the quality of feedback as poor or very poor.

"Employees are hungry for the informal conversations so the goals that the organization has are top-of-mind for employees and they know when they're meeting them and when they're not," Russell says.

**Assessing value to the business**

Neutral 6%

Unimportant/extremely unimportant 1%

Source: TEKsystems' survey of 3,500 North American IT professionals.
The process should start by knowing and clearly articulating those goals and how each IT worker helps reach them, says Dan Roberts, president of Ouellette & Associates Consulting Inc. in Bedford, N.H. Those defined goals should shape the metrics that are then used to evaluate technologists, he says.

"The skill sets and competencies are changing, so we have to assess our people in new ways, provide new frameworks, to see where they are with these new core competencies," Roberts says. "More and more they're being measured around relationships, how they're perceived by the business."

One of Roberts' clients, the IT department in a large pharmaceutical company, has a report card that considers business-unit satisfaction levels, which it then uses to assess how well IT teams are delivering on stated goals. "The metrics are changing from the heads-down technology metrics," he says. "Now it's on business results and the business value they're bringing to the organization."

Stephen Olive, CIO at Philips Healthcare in Andover, Mass., says his 500-member IT department sees itself as a strategic partner, so he's judging success on what IT is doing for the business and what value it delivers. "That pulls you away from your traditional performance programs," he says.

While Olive still considers cost and schedule when thinking about employee performance, determining whether IT workers meet those standards is now a smaller aspect of how he evaluates their performance, he says. Like other managers, he now looks for and measures on more esoteric factors, such as teamwork and cooperative behavior as well as understanding business goals and how to achieve them.

Olive points to the rollout at his company of Salesforce.com, which recently went live to 750 users. The success of that IT project is being measured by managers' and users' testimonials on whether the application helps them do their jobs better or more efficiently, "and you share that with your IT employees, so they know we're making an impact on the business."

While Philips Healthcare does have a formal performance development process -- which includes an annual goal-setting session and a midyear formal review where managers meet with their workers and provide written feedback -- the company's ongoing, informal performance-review mechanisms are more likely to capture the business value Olive is after.

Managers use "assessors," key people surrounding individual IT workers, to gather feedback on that employee's performance, which can then be used to better evaluate his or her strengths and weaknesses, explains Jean Scire, senior director of information.
systems at Philips, who reports to Olive. Depending on the project, an employee's direct manager, a business unit colleague or the business unit lead on a project could serve as an assessor. Employees generally have two assessors, Scire says, and their comments are formally documented.

The frequency of gathering this type of feedback varies, but managers are expected to do so on an ongoing basis. The goal, she says, is to ensure that there aren't any surprises when the midyear and year-end formal meetings roll around.

Olive says these assessments help ensure IT workers are evolving to keep pace with changing job requirements.

The ongoing, informal evaluations allow managers to identify and coach staff members who aren't performing up to snuff or move them into positions that better fit their strengths. And it allows management to recognize outstanding work through both feedback and formal recognition programs -- both great for morale, he says.

Above all, the process ensures IT as a department is serving the business, Olive says.

"We want to align IT much more strongly to the business and have IT be a real strategic partner, and that requires a different type of IT than your traditional IT, which I characterize as being project-centric, where you're evaluating with internal perspectives, where you look at cost and time," Olive says.

"With this business alignment, how you evaluate [performance] is really about what you're doing for the business and what value do you add."

**Walking the walk**

CIOs and IT management consultants stress that this evolving approach to performance monitoring and evaluation requires a lot from managers. They must be interacting with workers and their business unit colleagues often enough and openly enough to hear and see when systems are making the desired improvements, when collaborations are happening as they should, when projects are progressing as intended -- and when they're not.

That means taking the time to talk to them about a job well done or soliciting nominations for the company's monthly excellence in IT recognition program or working one-on-one with an employee who's missing milestones to figure out why, Scire says.

"You have to know your employees well enough to have those open communications," she observes.

Mitre CIO Jacobs agrees. "We've been increasingly pushing our [managers] towards 'meaningful conversation' rather than compliance to a checklist," he says. "But even though it's a conversation, it's not just chitchat. There's a method to it -- a method that aligns to what our company is trying to achieve."

### Key IT performance metrics

The modern IT shop should look at the impact its staff has on the business and be evaluated...
accordingly, says Rachel Russell, marketing director of TEKsystems Inc., which last year released a performance management survey and a report, *Create a Winning Team by Leveraging a Performance Management System*.

To do so, IT departments should ask the following questions, Russell says:

- What is the impact of the individual's or team's work on the bottom line? Does it generate revenue or cut costs -- or both?
- How well does the worker or team satisfy customer needs?
- Is the individual or team delivering on operational effectiveness or efficiency -- or both?
- Does the individual or team have a positive impact on other workers and resources in the organization?

As for implementing a performance evaluation strategy that works, Russell advises IT managers to do the following:

- Set clear expectations on what you think qualifies as great performance, even if not all expectations are quantifiable.
- Determine and articulate the mechanisms for performance feedback, both formal and informal.
- Give feedback promptly. Great performance deserves recognition right away so employees are encouraged to do more, while poor performance warrants coaching and discussion so workers know they need to get better.
- Be precise and direct. Use examples of what went well and what didn't rather than giving ambiguous analysis.
- Be constructive. Russell advises: "Beyond just saying, 'This isn't what I wanted,' say 'This is what I would have wanted you to do instead.'"
- Deliver feedback face to face when possible, Russell adds, "so you can have a relationship-building performance-management conversation."

*Pratt is a Computerworld contributing writer in Waltham, Mass. You can contact her at marykpratt@verizon.net.*