

April, 2000
San Francisco

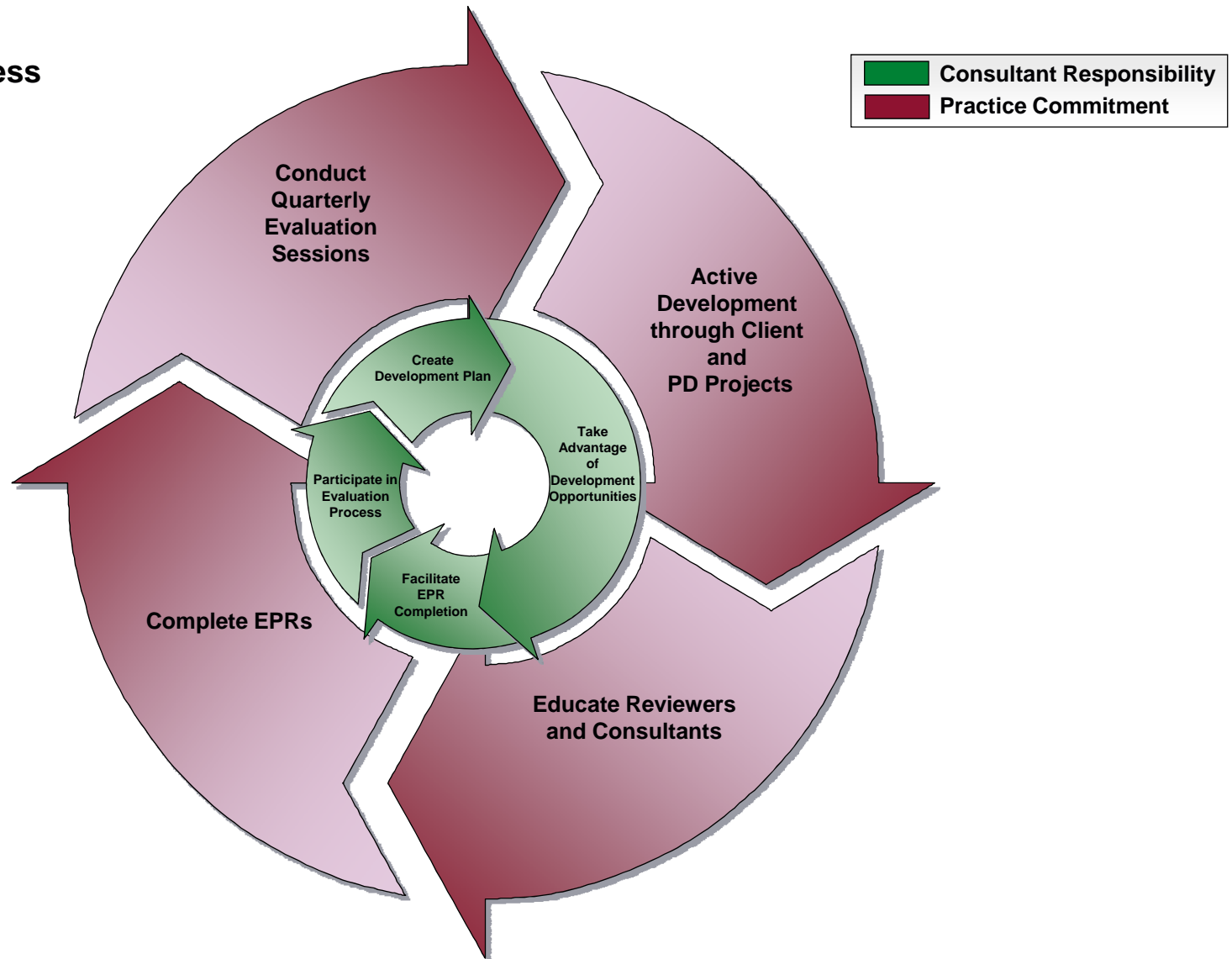


Northwest Strategy Practice

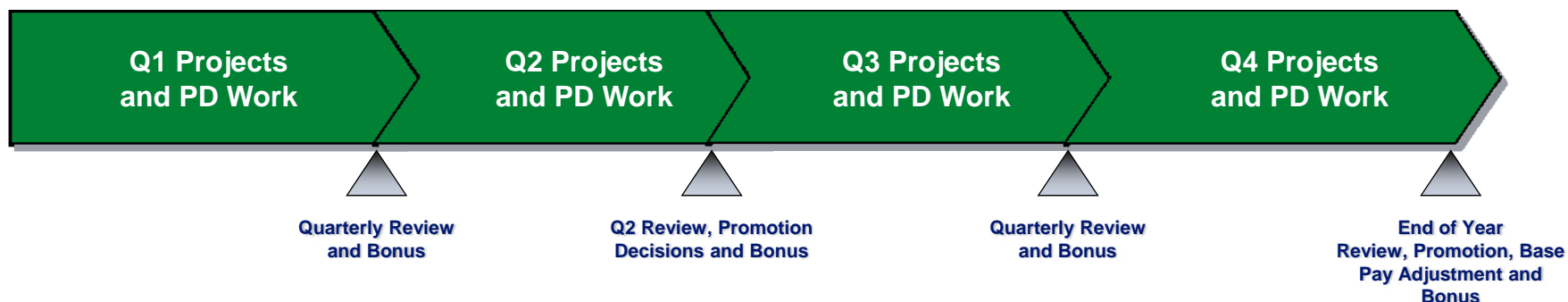
Consultant Performance Management Overview

Performance Management Process

Endstate Process



Anticipated Annual Process



Key Attributes and Activities

- EPRs completed at the end of EACH project
 - Long form for client projects
 - Short form for PD efforts
- Quarterly reviews based on coaches' summary of all EPRs during quarter
 - End of each project
 - If no project completed, coach requests interim project review from manager
- Q2 and Q4 reviews include promotion decisions
- All consultants have the option to provide feedback to other team members (managers and colleagues) using the same EPR criteria and forms
 - May provide feedback informally
 - May share feedback with project partner or team member's coach after discussing with team member

Performance Management Tools

Self Appraisals

Purpose

- Allows consultant to outline his or her accomplishments in light of the development plan and to highlight his or her involvement in firm and client development activities

Inputs

- Consultant perspective on performance
- Coach perspective (for development plan)

Responsibility

- Consultant

Timing

- Prior to each coach/consultant preparation conversation for Quarterly Review Session

Skills Criteria

Purpose

- Provide consistent expectations and measures for performance at each level

Use

- By consultants to determine development objectives
- By project managers and partners to evaluate team members
- By all team members to provide feedback to one another
- By coaches to assist in development planning and staffing

Evaluation Performance Review (EPR)

(Long Form)

Purpose

- Record consultant performance on a project along specific skill criteria inputs

Inputs

- Consultant performance

Responsibility

- Project Manager(s)

Timing

- End of consultant tenure on project
- Prior to review sessions (if necessary)
- Checkpoints at beginning and mid-point of project

(Short Form)

Purpose

- Capture consultant performance on PD work

Inputs

- Consultant performance

Responsibility

- Project Manager(s)

Timing

- End of PD work

Coaching Worksheet

Purpose

- Used as a tool for coach to consolidate and record consultant performance

Inputs

- Performance and development plan as outlined by Project Managers and consultant

Responsibility

- Coach and Project Manager(s)

Timing

- Prior to quarterly Review Sessions

Evaluation Summary

Purpose

- Consolidates consultant performance evaluations for use in Review Sessions and as a feedback mechanism for consultant

Inputs

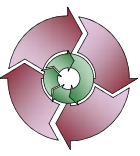
- EPRs and Coach data collection
- Evaluation Committee comments

Responsibility

- Coach

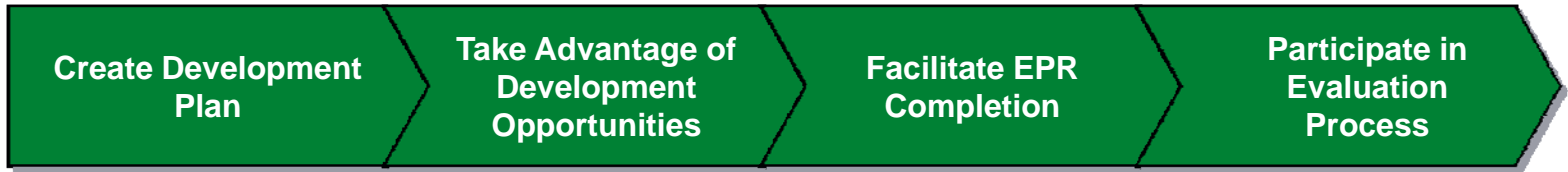
Timing

- Prior to and upon completion of each Review Session

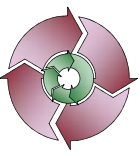


Development

Consultant Responsibility

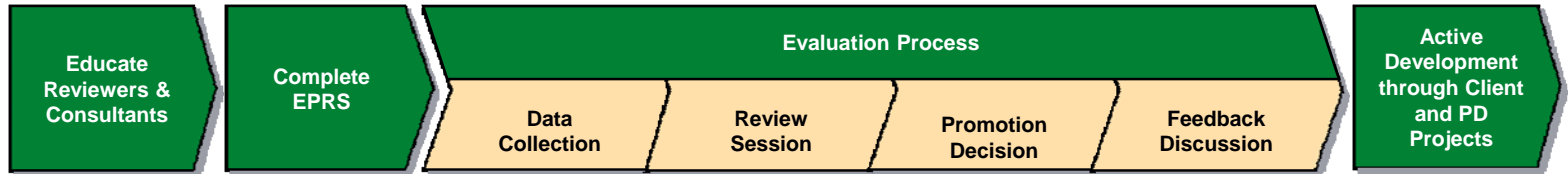


Objective:	<ul style="list-style-type: none"> Outline a set of clear measurable action items by which consultant can measure progress throughout the year Provide a platform for coach/consultant conversations 	<ul style="list-style-type: none"> Empower consultant to impact career development while ensuring client needs are met 	<ul style="list-style-type: none"> Ensure that consultants receive EPRs for all assignments (client and P.D. work) 	<ul style="list-style-type: none"> Maximize data reviewed in evaluation sessions
Action Steps:	<ul style="list-style-type: none"> Review evaluation feedback Hold coach/consultant conversation Generate concrete action steps for development plan 	<ul style="list-style-type: none"> Hold open discussion with staffing Engage in developmental conversation with Project Manager at beginning and midpoint of project Attend training sessions when offered (i.e., Access, presentation skills, financial analysis) 	<ul style="list-style-type: none"> Solicit EPR and evaluation discussion from project manager at the end of all engagements Comment on review as appropriate 	<ul style="list-style-type: none"> Complete self-appraisal and upward review Meet with coach to syndicate data
Tools:	<ul style="list-style-type: none"> Self appraisal (Development Plan) 		<ul style="list-style-type: none"> EPR form (Long and short) 	<ul style="list-style-type: none"> Self-appraisal



Process

Practice Commitment



Objective:

- Reinforce process and standards
- Educate reviewers
- Ensure that EPRS are completed for all engagements (Client and PD)
- Guarantee objectivity/ thoroughness of process by gathering numerous data points on each consultant
- Measure consultant performance against absolute standards
- Generate list of promotion candidates
- Promote stellar consultants to the next level
- Provide input to compensation committee**
- Communicate review and proposed development plan to consultant
- Provide consultants with appropriate development opportunities while balancing client need for consultants with appropriate skills and experience

Key Success Factors:

- Communication is consistent across all levels
 - Orientation
 - Training
 - EMT
- Coach education with partner oversight and responsibility
- Beginning and midpoint developmental discussion with consultant
- End of engagement notification mechanism
- Responsible project managers
- Dedicated syndicating role
- Timely and thorough completion of all materials
- Dedicated and insightful coach
- Complete and detailed knowledge of each consultant
- Practice-wide understanding of evaluation metrics
- Complete and detailed information on each consultant
- Complete and detailed information on each consultant
- Clear link between compensation and performance
- Dedicated and knowledgeable coach
- Calibration comments on evaluation summary
- Consultant flexibility
- Staffing flexibility
- Client opportunities

* In New York, review sessions will be followed by cross-unit calibration

** Typically a year end event

Overview

Educate Reviewers and Consultants

Orientation

NCT

EMT

Purpose:

Introduce evaluation process, roles and responsibilities

Re-emphasize evaluation process roles and responsibilities

Introduce coaching skills and responsibilities as part of the manager imperative

Description:

Session covering:

- EPR form
- Coaching role and assignments
- Evaluation process overview

Session covering:

- EPR form
- Skills definition and exemplary behaviors
- Evaluation summary sheet
- Evaluation process, consultant responsibility and firm commitment
- Role of the coach
- Development plan creation
- Receiving feedback

Session covering:

- Coaching skills
- Giving feedback well
- Do's and don'ts of EPRs and Evaluation Summaries
- Coaching as a personal developmental tool

Timing:

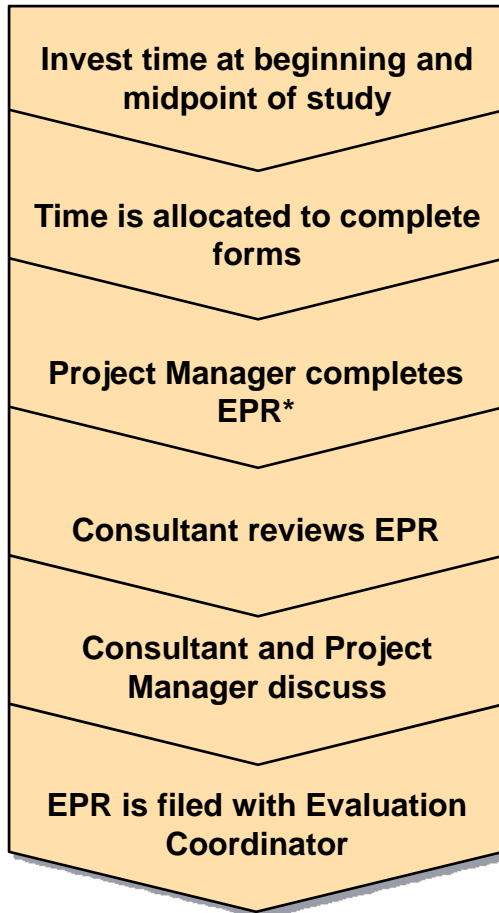
First week of consultant's career at marchFIRST

Within six months of joining the firm

Beginning of manager's career

Activities

Complete EPRs



Key Process Activities

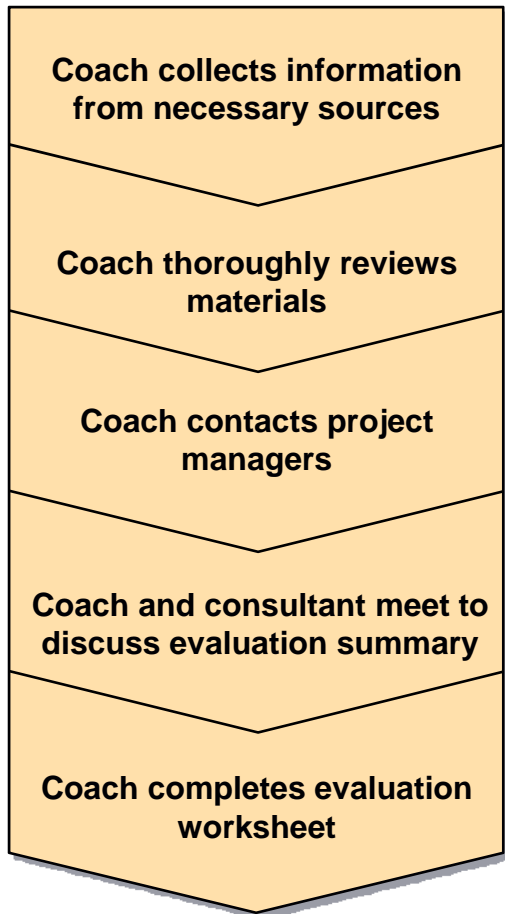
- Project Manager prepares ground by having an initial meeting and midpoint discussion with **each** consultant about development
- Project Manager reinforces the importance of completing EPRs and upward reviews
- Project Manager completes detailed EPR using most recent Evaluation Summary and concrete examples
- Project Manager solicits input from partner and colleagues and incorporates into EPR
- Project Manager allows consultant to review EPR independently
- Project Manager holds discussion with consultant providing insightful feedback and suggesting development objectives
- Consultant's comments are added to EPR
- Consultant signs EPR
- Project Manager files EPR with local Evaluation Coordinator

* Note: It is the Project Manager's responsibility to complete an EPR for each consultant for any project including PD work



Evaluation Process

Data Collection



Key Process Activities

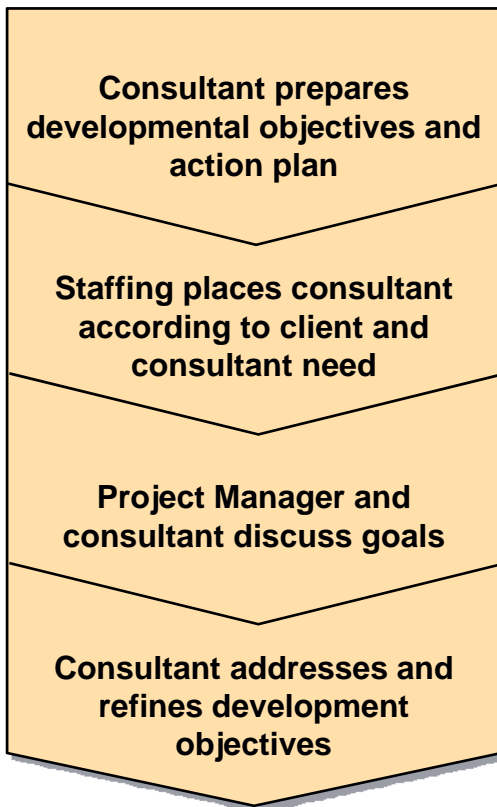
- Evaluation Coordinator provides consultant file containing:
 - Past and current EPRs
 - Evaluation Summary
 - Evaluation worksheet
 - Past Self Appraisals including development plans
 - Upward reviews (if applicable)
 - Client recommendations
- Coach reviews all material in detail to gain a comprehensive understanding of the past six months performance
- Coach contacts consultant's project manager(s) to clarify any issues or recent updates to performance
- Coach discusses EPRs with project managers
- Coach gains in-depth understanding of consultant skill level and performance
- Coach discusses Evaluation Worksheet and summary with consultant
- Consultant provides Self Appraisal for inclusion in Evaluation Worksheet
- Coach and consultant prepare preliminary development plan
- Using all data sources coach completes Evaluation Worksheet with exemplary skill behaviors for presentation in Review Session

Note: Evaluation Worksheet is prepared by Evaluation Coordinator with information from most recent EPRs

Objectives

Active Development Through Client and PD Projects

Key Process Activities



- Using the outputs of the feedback discussion consultant prepares prioritized outline of developmental needs and action plan for conversations with staffing

- Consultant outlines for staffing prioritized developmental needs
- Staffing outlines opportunities available
- Consultant is staffed

- Project manager and consultant meet to discuss goals of project and consultant developmental objectives

- Select developmental objectives addressed through duration of assignment
- Consultant has ongoing conversations with coach to discuss developmental objectives

Coaching Role

- **Objective**
 - Ensure that all consultants have an active and knowledgeable representative and advisor for career development
- **Responsibilities**
 - Participate in development plan creation
 - Advise consultant on staffing and training options
 - Summarize performance from EPRs, firm involvement, self-appraisal, etc. for quarterly review sessions
 - Represent the consultant's performance in Review Session along with current Project Manager(s) and/or Partner(s)
 - Provide constructive feedback
 - Serve as sounding board throughout the evaluation process, regarding staffing issues, and for any career issues or opportunities

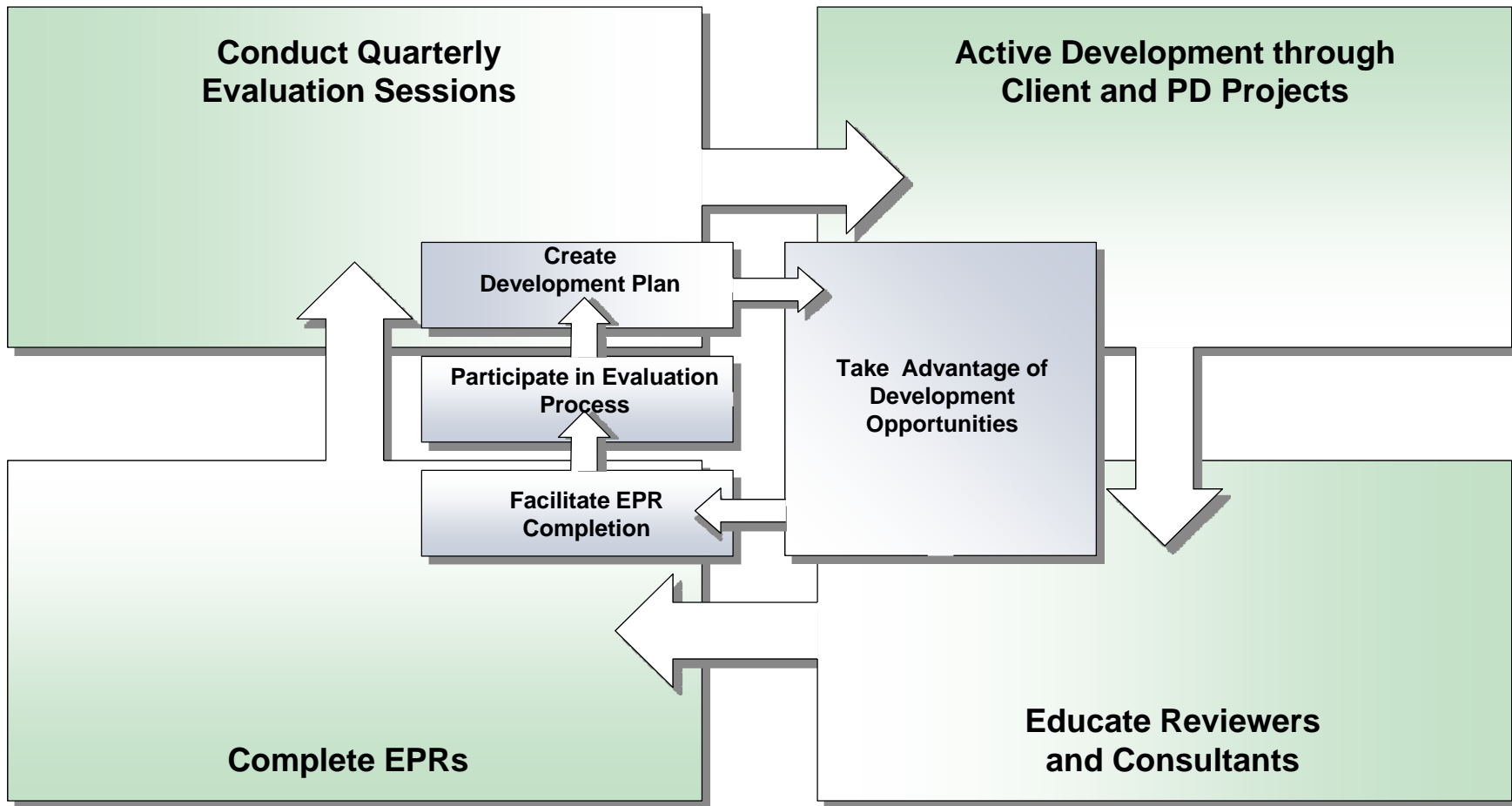
A coach is not an evaluator – a coach is consolidator of information. A coach does not have the power to promote. A coach can state and defend a position but does not have the power to promise or deny promotion

Next Steps

- The first integrated practice review session to be held at the end of June (Joint NW and SW effort)
- Each consultant now has an assigned coach -- meet with coaches regarding development, staffing, performance, etc. . .
- Ensure that each consultant receives an EPR at the end of EACH project
- Provide feedback to other team members using criteria and forms if you wish
- Direct questions or concerns to:
Management

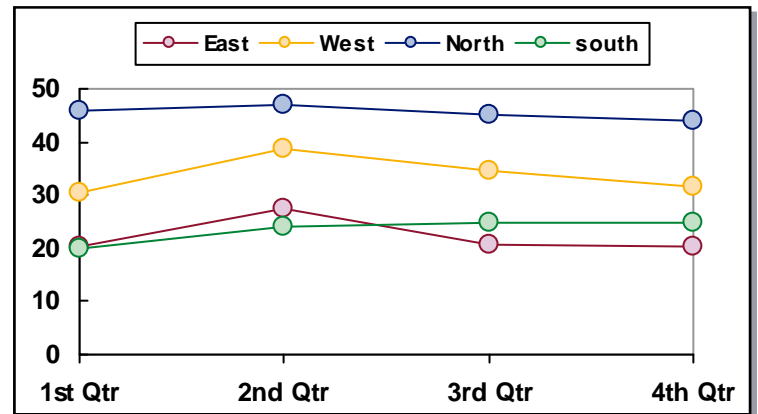
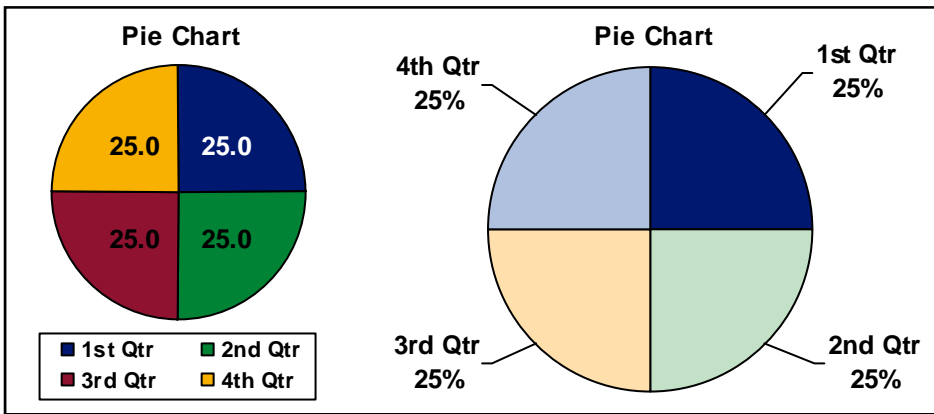
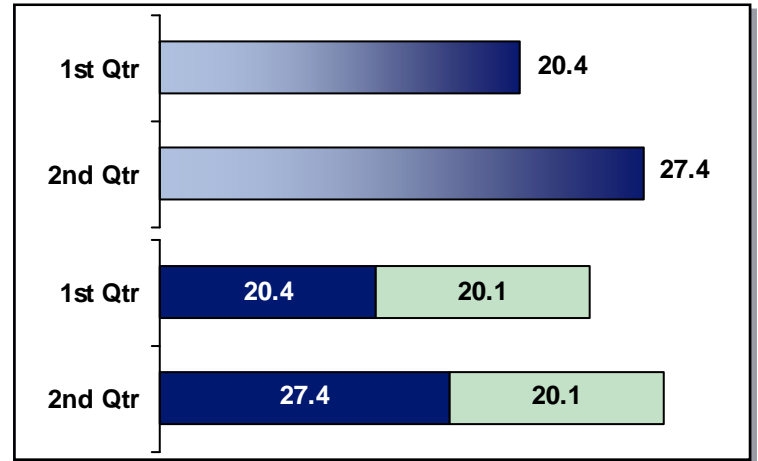
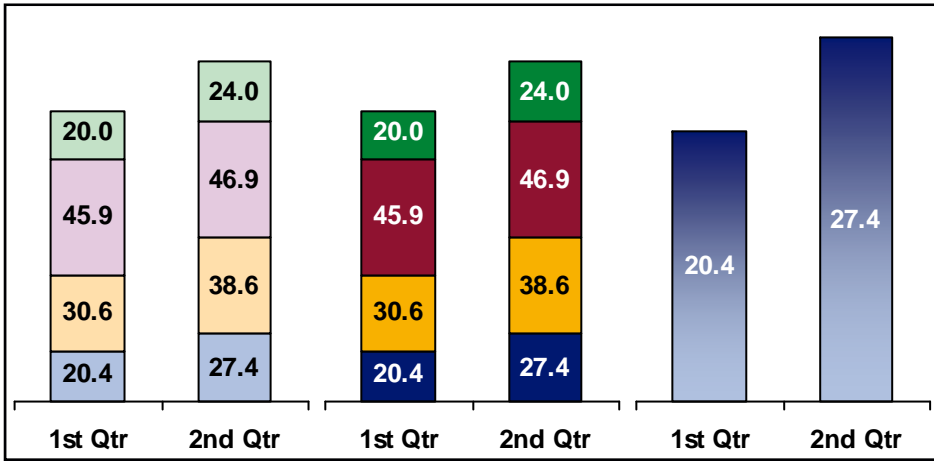


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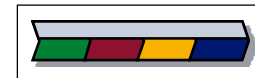


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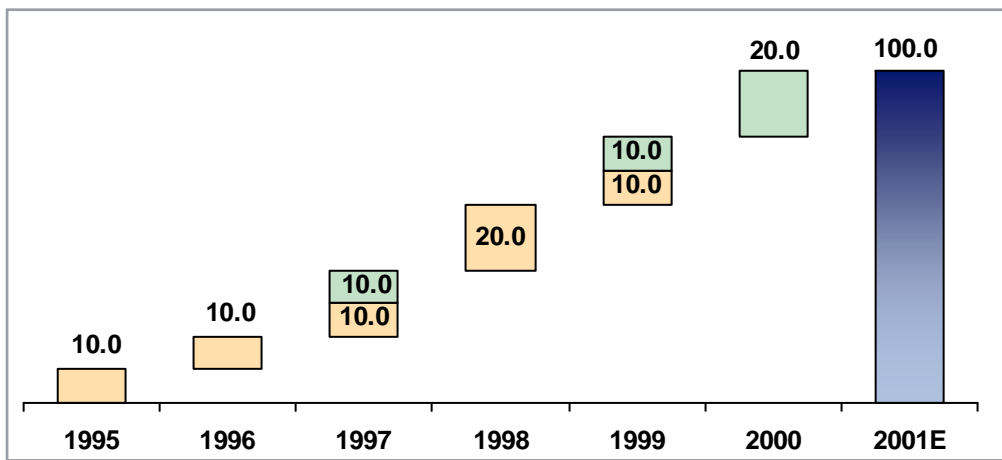
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Examples

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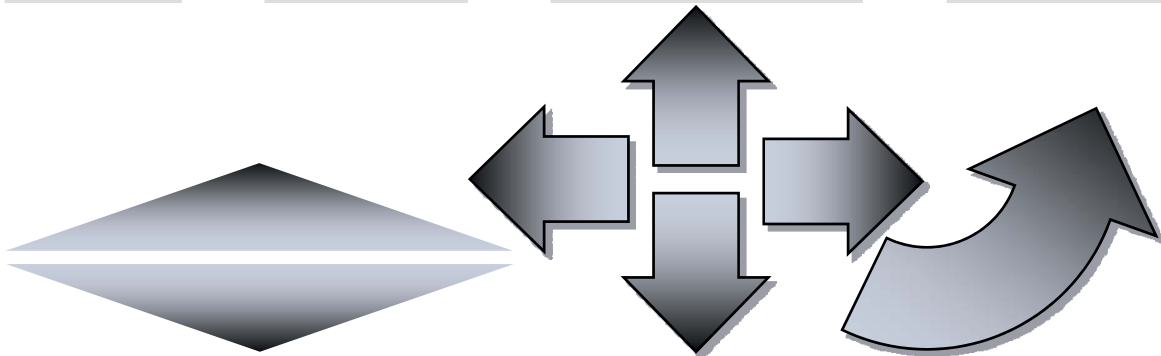
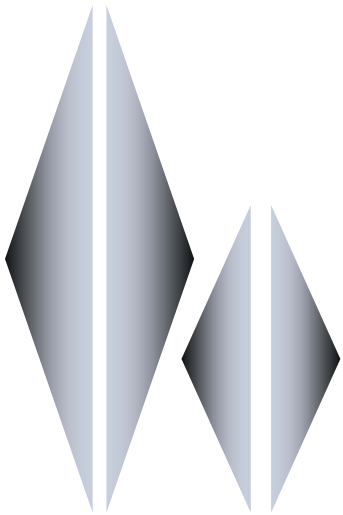
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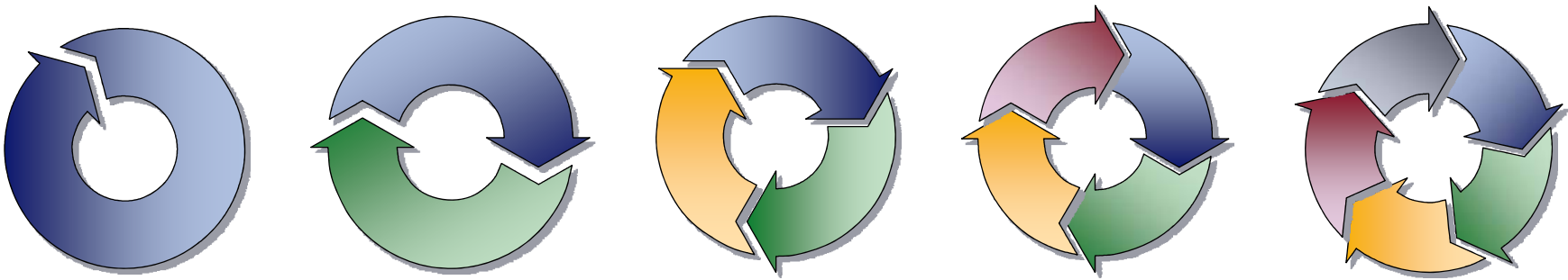
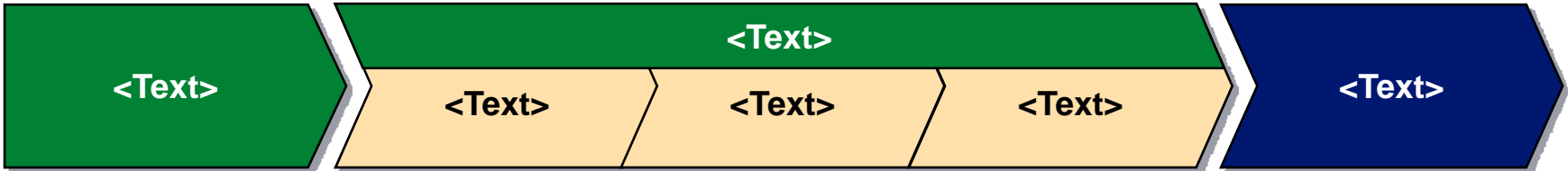
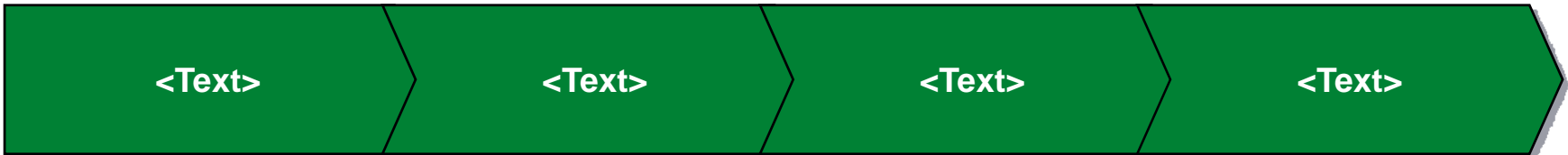
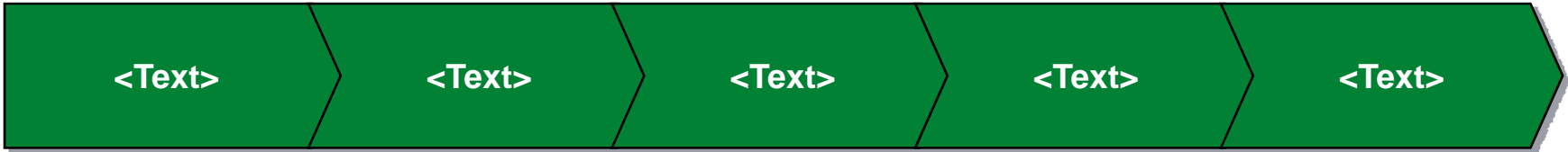
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- Illustrative
- Example
- Draft
- Discussion Draft
- Conceptual
- Estimated
- Preliminary
- Sample
- Proposal
- For Discussion
- Examples



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