

# Focused Action Research Based Goal Pursuit: The Secret Sauce in Great Performance Review



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## INTRODUCTION

The importance of both performance review and goal pursuit for a range of activities such as strategic planning, focusing and aligning thinking, professional development, motivation, learning, creating a sense of completion and achievement, and enhancing personal and organizational performance is widely articulated (Armstrong, 2000; Asplund & Blacksmith, 2013; Gordon, 2006; Kouzes & Posner, 2007; Locke & Latham, 2013; Vorhauser-Smith, 2011). For many people, however, these two activities individually and collectively are often associated with feelings of: time-wasting; pointlessness; constraint about being pinned down; hierarchical imposition and control; poorly conducted reviews by management; isolation in commonly individualistic processes; and confusion about the processes (see for example, Bird, 2015; Forrester, 2011; Myrna, 2009; Perillo, 2006).

It is my belief, borne out of extensive experience in a performance reviewer (with over 120 senior leaders in organizations) and researcher role, that performance review can have many positive employee and organizational improvement outcomes. I hasten to add that this experience has indicated practical process elements in performance review that are make or break in contributing to creating meaning, acceptance and impact. Most of those elements are linked to the approach adopted for pursuing goals within performance review and it is this specific topic that I wish to emphasize in this chapter.

I begin by presenting an overview cycle to establish the broader performance review context before paying specific attention to the Focused Action Research Goals (FARG) approach (adapted from Piggot-Irvine, 2015) embedded within the cycle. The FARG approach is designed to address some of the earlier noted constraints via inclusion of simple, flexible, iterative (cyclical and on-going), collaborative and evidence-based decision making elements. In addition, the FARG approach strengthens strategic alignment of individual, team, and organizational aims.

The next section of the chapter provides background to three key principles underpinning the overview cycle and embedded FARG approach: shift in depth, lift in challenge, and authentic collaboration. Shift in depth is more likely to occur when performance review and embedded goal pursuit involve the use of evidence/data to support any conclusions drawn, where reviewees become informed through examination of best practice ideas linked to specific goals selected, and when there is detailed planning to show improvement steps and timelines. Lift in challenge is frequently associated with the term high goals and, as these terms imply, the goals should stretch the reviewee. Authentic collaboration is enacted when reviewees are engaged with others in ways where not only support, clarity and mentoring are provided but also strong feedback, honest dialogue and critique. It involves striving for shared (bilateral) control in performance review through employment of a non-defensive (productive), dialogical, orientation on the part of reviewers and reviewees.

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The final section of the chapter explores thinking from the neuroscience and neuroleadership fields linked to goal pursuit in particular. Areas of the brain involved in goal pursuit are discussed alongside interpretation of relevancy of findings to practical application and potential limitations associated with interpretation. Note that deeper discussion of many of the topics discussed in this chapter is provided in my recent book (Piggot-Irvine, 2015).

## **PERFORMANCE REVIEW: AN OVERVIEW CYCLE**

In keeping with my earlier writing (Piggot-Irvine & Cardno, 2005) I consider performance review (also variably described as performance management and appraisal) as an activity "... intended to benefit both the individual and organisation by leading to affirmation that performance expectations are being met, and to the identification of areas for improvement" (p. 12). Essentially, it includes clarifying expectations of performance and development goals, supporting reviewees (through development) to meet those expectations and goals, and monitoring and reporting on achievement of performance expectations and goals. Armstrong (2000) described it similarly and determined that it requires the following five fundamental activities: role definition; a performance agreement (or contract); a personal development plan; managing performance throughout the year; and a performance review (pp.17-18). The process has an overarching strategic function which Armstrong (2000) suggested "is an integrated process that delivers sustained success to organisations by improving the performance of the people who work in them and by developing the capabilities of individual contributors and teams" (pp.1-2).

The overview cycle which I have adopted for performance review (Piggot-Irvine & Cardno, 2005) reflects Armstrong's activities and function via inclusion of the following range of essential components:

- The development and negotiation or clarification of a set of performance expectations (a job description).
- Jointly set (in a partnership between the reviewer and reviewee) goals for development that are elaborated in a performance agreement.
- Coaching, mentoring and support for professional development to achieve expectations and goals.
- Reviewee evidence gathering to demonstrate achievement of performance expectations and goals.
- Reviewer and reviewee regularly meeting for support, monitoring, data gathering and dialogue about achievement against the performance expectations and goals.
- A review of performance and achievement on the basis of evidence.
- Formal reporting of achievement.

The activities, specifically designed to fulfil dual purposes of accountability and development, are shown in the overview cycle provided in Figure 1.

Although this cycle was developed over a decade ago, in my experience it is only recently that the appeal of the dual accountability and development purposes seems to be gaining favour beyond a more frequent adoption of checkbox and high accountability processes. Getting the right balance of accountability and development in performance review is difficult and, in my opinion, is intimately associated with the way in which goals are pursued. It is this specific activity, shown as amplified in bold in Figure 1, on which I will now elaborate.

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