

A Guide to Attracting and Retaining Top Employees



Attract and Retain the Top Talent

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Resources

Article #1: The Best Employee Incentive is Recognition

<http://www.pcq-services.com/the-best-employee-incentive-is-recognition/>

In the current economy, many employers have had to scale back on bonuses and commissions while prodding their employees to do more for less. If you don't have an employee incentive program built into your budget, you're in luck. Fortunately, there is mounting evidence that the best employee incentive programs have nothing to do with monetary prizes, but instead involve the relationship that employers build with their workers. That's not to say that a bonus or gift incentive isn't appreciated, but it is wise to look for ways you can connect with your workers to help them be at their most productive.

Show you care

Many employees respond best when they feel their company cares about them and their ideas. Unhappy employees are less likely to perform at their best. How do you show you care? Sure, monetary incentives are great, but after a while that Olive Garden gift card gets a little stale. Make a genuine effort to show that you not only care about your employees' work projects, but that you also care about them. It's simple really. Take the time to make small-talk and express an interest in your employees' family life and extracurricular activities. Praise workers who have done a good job, and remember that a little bit of kindness goes a long way. Employees who feel that their company cares about them will typically return the favor and care about their company. The worker who cares about his or her company is also going to care more about his or her job duties and will consequently perform better. It's a common sense principle that is too often overlooked.

Give attention to your employees' goals

Investing in your employees' success will give you great returns. Take an active approach and talk to employees about their goals. Create an atmosphere that is conducive to employee growth by making time outside of annual reviews to find out what employees really want to do and what they're working toward.

You may find that some of your workers are great at the projects you've assigned to them, but they also have innovative solutions to other issues that have arisen in your business. You may learn that they consider what they're doing now to be a stepping stone, and that's okay. Promotion is a huge incentive. By helping your employees reach their goals, you will be bettering your company. You can always hire someone else to fill entry-level positions that ambitious employees may vacate, but you can't always re-create the chance to mold a manager from the ground up.

R-E-S-P-E-C-T

You're a busy person, but so are your employees. There are few things as disheartening to staff as to work extremely hard on a presentation and then to look around the conference room only to notice that the manager is busy on his or her laptop or mobile device. Unplug during meetings, and give your employees the full respect and attention they deserve. That also goes for not answering emails or the phone when you're in the presence of one of your employees.

Show appreciation

Finally, use manners. A simple "thank you" for a job well done is a great way to show employees you care and you noticed their hard work. You can thank employees in the presence of others, but that isn't necessary. A genuine show of appreciation can go a long way toward helping an employee feel recognized and re-energizing their desire to do a job well.

Article #2: Helping Employees Live the Brand

http://blogs.hbr.org/cs/2011/03/helping_employees_live_the_bra.html

Want to keep your employees committed to your mission? You could learn something from the Altria employees who come to the University of Richmond's MBA program, which is near Altria's headquarters in Richmond, Virginia. I have noticed that not only can they recite the company's Mission and Values (most have cards in their cubicles or offices with these written on them), they also can tell you how each action they take is impacted by the company's Values, and how their positions roll up to support the Mission. This clarity extends to understanding Altria's companies' brands as well.

Somehow, while constantly adapting to evolving consumer culture, retailer pressures and regulatory constraints, Altria employees remain actively committed to the firm's corporate mission and engaged with the DNA of each of its brands. Intrigued, I talked with Brendan McCormick, Altria's V.P. of Communications, to understand the extent to which Altria's internal communications strategy leads to the clarity I have witnessed in Altria employees. Here are four lessons I took from that conversation:

Lesson 1: "Living the Brand" starts with the interview. Prospective employees know it's a tobacco and wine company, so those who are offended by the production or sale of such products don't apply. But from the very beginning, Altria emphasizes the importance of how it conducts its business, thereby helping all prospective employees understand Altria's place in society. I haven't met an Altria employee yet who can't say clearly why he or she works there. And the answers are surprisingly similar. Not because they've blindly adopted the corporate line, but because they were attracted to it in the interview and live it on the job. *Are your company's mission, vision and values relevant to first-time job seekers and current employees as well as Wall Street analysts and other external stakeholders?*

Lesson 2: Encourage conversations about values. McCormick admits that Altria wasn't always open to discussions of how society felt about cigarette companies. But leaders realized that if the company wasn't talking with current and prospective employees as well as other stakeholders about problems with its products and how it does business, it wasn't going to survive. By incorporating discussions of mission, vision and corporate values in the recruitment process and early in the training and development of employees, Altria gives everyone across its family of companies a consistent benchmark against which actions and plans can be judged. This makes it possible for even the most junior employee to engage in a grounded conversation with anyone in the company about specific actions, coordination across functions, or overall corporate direction. *Do your mission, vision, and values empower employees at all levels to actively engage in strategic conversations?*

Lesson 3: Peer-to-Peer training allows formal internal communications to focus on "reminding" and "encouraging." When Mike Szymanczyk first assumed the role of CEO, he personally introduced the Mission and Values to employees. He and his senior leaders have subsequently introduced the Mission and Values to companies that have joined the Altria family of companies. This was necessary to demonstrate the importance senior leadership placed on them and the fact that they were going to apply to every employee consistently across the entire family of companies. Now, peers present these to new hires and current employees. It's a "see, do, teach" approach that gives each employee the confidence to use the Mission and Values in their daily work lives. This also relieves Brendan's communications group of the responsibility

for teaching; instead, they just remind and encourage. *Are your employees given opportunities to teach your mission, vision and values to peers?*

Lesson 4: Missions, Visions and Values are business tools, not "branding" tools. I figured the best way to launch the conversation with Brendan would be to ask about "branding Altria." But he quickly asserted that Altria's actions were not a branding exercise; instead, the company wanted to create a culture and environment where it could succeed. As he said, "Marketing can't get ahead of the facts." Altria is not about to change its name to BC (beyond cigarettes) anytime soon. Basically, you can't tell people you are something you're not. Getting employees to "live the brand" requires a mission, vision and values that are genuine drivers of business performance. *Is your mission, vision and values something written on a card, or how your people work every day?*

Article #3: How to Get Employees Excited About Your Business Vision

<http://www.inc.com/guides/2010/08/how-to-get-employees-excited-about-your-business-vision.html>

Most entrepreneurs dream of a staff that puts in long hours, devises creative ideas, and generally goes above and beyond their job descriptions. Here's how to make it happen. It's no secret that, as a business owner, your venture is your baby. It's needy, it's frightening, and you're completely devoted to it. If only you could make your employees feel the same way. Well, at least the devotion part.

The first step to getting employees pumped about the company's direction is to examine what employee engagement is. Peter Stark, a management consultant and the author of *Engaged! How Leaders Build Organizations Where Employees Love to Come to Work*, defines it as a state in which, "employees are connected both at the head and the heart and they are willing to give what I call discretionary effort, meaning willing to do whatever it takes to get the job done." A lack of employee engagement can manifest in the form of poor customer service, low morale, and missed business opportunities.

On the flip side, if you can sell your employees on the company's future and the importance of their role in it there are numerous advantages. "People are more likely to generate their own ideas, to contribute with enthusiasm, to keep slogging when it becomes unpleasant, and also to experience a sense of camaraderie and togetherness," says CV Harquail, author of the blog authenticorganizations.com.

Keep reading to learn how to measure employee engagement, communicate your vision to employees, and scale engagement as your business grows.

How to Get Employees Excited About Your Business Vision: Clear Communication

The crucial first step of sharing your business vision with the company in order to get people to buy in seems like a no-brainer, but especially at the lower echelons of the org chart employees are often clueless to the machinations of the top brass, and it's bound to hurt engagement and productivity.

"There's a lot of leaders out there that take the employees, blindfold them, spin them around 10 times, and then want them to go hit the tail on the donkey and they can't do it," Stark says. Workers need to have a sense of how their roles interweave with the larger goals of the company in order to take pride in the importance of their work and to do the best possible job on every project. Stark advises tapping as many methods of communication to reach out to employees as you can, including e-mail and phone blasts, [Facebook](#), [Twitter](#), and even texting.

But sometimes it takes more than communicating through different media and helping employees relate personal goals to company goals. Stark notes that some people will be swayed by rhetoric while others want cold hard facts before they buy in and you have to cater to both groups.

"You say, 'do I have to be the charismatic leader who's going to get up and give a speech in front of the company?' There's a bunch of employees who're going to hear that and are going to hear that charismatic, dynamic speech and say this is BS," Stark points out. For the skeptics breaking down quarterly efforts and the results they achieved and where they could be improved will go farther than a joke-filled speech.

Dig Deeper: How Poor Communication Hurts Morale
How to Get Employees Excited About Your Business Vision: Keeping an Open Ear

But wait, you've been so busy talking to your employees that it's easy for their voices to get lost in the shuffle. "Make a commitment to listen to your employees when they talk about the product and to listen to your employees when they talk about what's going on in their organization," Harquail advises. The best news for the state of your employees' engagement is if they're constantly complaining.

"People, when they complain, are actually showing you that they're engaged, oddly enough," she adds. "The challenge is to take those complaints and those glimmers of pride and enthusiasm and actually hear them" and turn them into suggestions for change.

Dig Deeper: How to Handle Employee Complaints
How to Get Employees Excited About Your Business Vision: Measuring Engagement

You've just come out of an all hands staff meeting, your speech went off without a hitch, but did it help get employees engaged? It can be hard to step back from your intimate perspective of the business and try to accurately gauge how your employees feel about it.

While Harquail points out that there are a slew of tools consultants use to measure engagement, she feels that, rather than taking a quantitative approach, the best tool is simply to observe the human interactions that go on every day at your company. The level of engagement is revealed in "the very subtle things," she says. "It's the feeling, it's the spirit, it's the warmth, it's the level of concern in people's voices. That's the stuff that's the indicator of engagement.

However, there are times when the tools at a consultant's disposal come in handy. Stark's consulting firm, for instance has run 250 organizations through its engagement survey, which asks employees questions such as "Do you feel that your supervisor respects you?" "Do you have a clear sense of what your personal goals and responsibilities are?" and "Does your supervisor give you praise and recognition?"

Stark then created a benchmark of the top 25 percent of companies and charted how they

responded to the queries differently than their less successful competitors. The biggest distinction they noticed is that, while intradepartmental (within a department) teamwork didn't differ much between the best of the best and the rest, interdepartmental (involving different departments) teamwork spiked 15 percent among the most successful companies.

"Why would that make a difference to an employee's engagement?" Stark asks. "Because it makes it a lot easier for them to get their job done."

Though probing employees with a battery of questions can yield some answers some times, a high tech experiment can reveal even more. Harquail referenced a study where 80 employees at a Bank of America call center in Rhode Island were given "sociometers" that measured which co-workers they spoke to every minute for a month. The MIT researchers conducting the study found that employees who talked to their co-workers more were working faster without a dip in their approval ratings and feeling less stressed. The center decided to stop staggering employee coffee breaks to allow them to communicate more often and more organically and they estimated productivity gains of about \$15 million a year.

"They were venting steam about bad call situations that they had, and they were also sharing advice with each other about how to do [their jobs] better," Harquail explained.

Dig Deeper: How to Get Feedback From Employees

How to Get Employees Excited About Your Business Vision: Are All Businesses Created Equal?

Non-profits have notoriously high employee engagement. How else can you explain the dedication people show to their personal and organizational goals in the face of that sector's equally infamous salaries? But even if your business isn't saving the rainforest or building orphanages you can still cultivate a sense of pride in your employees and a belief in the importance of your missions.

Harquail gives the example of a company she's worked with that reclaims unused gas from construction sites, then cleans and filters and repackages it for resale. Not the work of Mother Teresa, but it's also not the work of greedy financiers. What's important, Harquail explains, is that "the way that this small business constructs their task is what they're doing is a really valuable benefit to the environment."

She says critics could easily downplay this narrative and question how substantial an environmental impact the company's work actually has but it still gives employees "big picture perspective that makes it matter to them."

Dig Deeper: Why is Business Writing So Awful?

How to Get Employees Excited About Your Business Vision: Maintaining Engagement as Your Business Grows

When you're making your first hire you have more time and energy to persuade them of the unassailable merit of your business vision and see if their ideological background matches your own. As your company grows however, and you relegate a portion of those decisions to an HR department or a manager, it becomes harder to both find that match for and make that pitch about your vision.

"I'm fond of saying that 70 percent of an employee's level of engagement or excitement about

the job or the company they work with is in direct relation to their immediate supervisor," Stark relates. "People come to the company because they need a job and an immediate paycheck; they usually leave the company because of the supervisor." If you make sure to hire quality supervisors who can create an atmosphere where employees feel valued, it should reduce your growing pains and turnover.

Dig Deeper: How to Build an Onboarding Plan for New Hires

How to Get Employees Excited About Your Business Vision: Is Employee Engagement Exploitative?

Is Employee Engagement Exploitative? Not inherently, but it can easily be abused by employers who seek to strengthen the commitment of their employees without giving them anything in return. Harquail says that this incentive can take a financial form such as a future bonus or raise, but just as easily it can come from giving employees the opportunity to shape the product or service and in other ways have a greater influence on the direction the company is taking.

"It's one thing if you're engaged in something that somebody else has already defined and constrained," she explains, "but it's another thing if you get to participate and get involved in it in a way that you can help to create."

The engagement of the employees and whether or not they feel exploited depends heavily on the attitude of the founders and the top executives. Why are they in business? "If the person is doing this business because they want fame, they want money, they want influence it's unlikely that members of their organization are going to want to get engaged."

Stark, however, contends that there is a difference between motivating and manipulating employees. "I believe in my heart that when people feel that they've made a significant contribution, or done really great work, most people go to bed feeling better about themselves," he says. But like Harquail, he feels there must be some degree of exchange of power and information if a company wants to boost employee engagement. "The only time you're ever going to get points for being honest or trustworthy is when it costs you something," he opines.

Article #4: How to Recruit Top Talent

<http://www.entrepreneur.com/article/78598>

Having trouble attracting quality applicants? Your business's culture may be to blame.

Hiring and retaining the best talent is as tough as it's ever been, with projections through 2012 indicating that, for the first time in U.S. history, the number of younger workers entering the labor market won't be enough to replace those who are leaving. By 2006, one in six workers will be over the age of 55, while the 25-to-34 demographic will have shrunk by nearly 9 percent, according to a study by the National Association of State Auditors, Comptrollers and Treasurers. Despite this workforce trend, it's still possible to attract more talent than your company needs. Consider Southwest Airlines, which, according to one company insider, recently received more than 50,000 applications for 500 available positions! Cultivating a company culture that attracts top talent, such as Southwest's, is just one of five best practices the top 10 percent of U.S. companies have in common. And it's a practice your company can adapt.

Try following these four tips for creating a desirable company culture:

1. **Put your employees first.** Researchers agree that the best way to hire and keep top talent is to create a company culture where the best employees want to work, a culture in which people are treated with respect and consideration at all times.
A classic, big-business example of someone who used the power of respect is David Packard, co-founder of Hewlett-Packard. Packard always showed unfailing respect for everyone who worked for him. He defined the HP culture and positioned his company as an enduring preferred employer. He also exemplified the pacesetting leadership style by setting high performance standards for himself--and his employees followed suit.
2. **Maximize your best employees.** Although you may not be able to fill every position in your company even if you have a strong corporate culture, researchers say that one sure way to maximize your best employees is to place them in positions of great influence.
For example, when unemployment in the Washington, DC, area dropped below 2 percent, David Grissen, Marriott International's eastern region executive vice president, met with his managers and decided to focus the company's hiring efforts on front desk employees because of the enormous impact they have on hotel guests. The resulting "Front and Center" hiring initiative brought together managers of every Marriott hotel in the region to improve the company's recruiting, selection and orientation programs for front desk positions. Potential employees for these positions must now undergo a minimum of four interviews and achieve a high score on a standardized evaluation metric.
3. **Stay involved and use emotional intelligence.** Research indicates that one of the worst employment moves a small-business owner can make is disengaging from the hiring process. After all, it's your culture, your company and your leadership--why allow someone else to make your hiring choices?

And when you're in the process of hiring a new employee, remember to carefully assess your applicants' emotional intelligence (EI) along with their intellectual capability. Research shows that an IQ assessment doesn't predict job success nearly as accurately when used alone as it does when combined with assessments of the cognitive and social abilities that comprise someone's emotional intelligence. An EI evaluation offers a strong indication of how well an applicant may fit into your organization.

Staying flexible is also important. If an employee you hire proves to be a good fit for your company but not for the specific position filled, try moving them to another position that capitalizes on their strengths and experience. Employees who are a good fit organizationally can be hard to find.

While there's no guarantee that putting your employees first, maximizing your best workers, staying involved and assessing emotional intelligence during the hiring process will fill every open position in your company, solid research of the top 10 percent of U.S. companies clearly indicates that it's the most successful way to go.

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Mini - motivations...

<http://www.fuel-my-motivation.com/employee-motivation-techniques.html>

Motivation Story #1

A crow was sitting on a tree, doing nothing all day. A small rabbit saw the crow, and asked him, "Can I also sit like you and do nothing all day long?" The crow answered, "Sure, why not."

So, the rabbit sat on the ground below the crow, and rested. All of a sudden a fox appeared, jumped on the rabbit and ate it.

Lesson: *To be sitting and doing nothing, you must be sitting very, very high up.*

Motivational Stories Lesson #2

A turkey was chatting with a bull. "I would love to be able to get to the top of that tree," sighed the turkey, "but I haven't got the energy."

Well, why don't you nibble on some of my droppings?" replied the bull. "They're packed with nutrients."

The turkey pecked at a lump of dung and found that it actually gave him enough strength to reach the first branch of the trees. The next day, after eating more dung, he reached the second branch. Finally after a fourth night, there he was proudly perched at the top of the tree. Soon he was promptly spotted by a farmer who shot the turkey out of the tree.

Lesson: *Bullshit might get you to the top, but it won't keep you there.*

Motivation Story Lesson #3

A little bird was flying south for the winter. It was so cold the bird froze and fell to the ground in a large field. While it was lying there, a cow came by and dropped some dung on it. As the frozen bird lay there in the pile of cow dung, it began to realize how warm it was. The dung was actually thawing him out!

He lay there all warm and happy, and soon began to sing for joy. A passing cat heard the bird singing and came to investigate. Following the sound, the cat discovered the bird under the pile of cow dung, promptly dug him out, and ate him!

Lesson:

1. *Not everyone who drops shit on you is your enemy.*
2. *Not everyone who gets you out of shit is your friend.*
3. *And when you're in deep shit, keep your mouth shut.*

Motivation Story Lesson #4

The boy rode on the donkey and the old man walked. As they went along, they passed some people who remarked, "It was a shame the old man was walking and the boy was riding." The man and the boy thought maybe the critics were right, so they changed positions. Later, they passed some people who remarked, "What a shame, he makes that little boy walk." They decided they both would walk! Soon they passed some more people who thought they were stupid to walk when they had a decent donkey to ride. So they both rode the donkey! Now they passed some people that shamed them by saying, "how awful to put such a load on a poor donkey." The boy and man said they were probably right so they decided to carry the donkey. As they crossed a bridge, they lost their grip on the animal and he fell into the river and drowned.

Lesson: *If you try to please everyone, you will eventually lose your ass.*

Outstanding Videos on the Purpose and Motivation:

http://www.youtube.com/watch?v=u4ZoJKF_VuA

--Simon Sinek at a Ted Talk, Simon Sinek – “Start with Why”, or the “Law of Diffusion of Innovation” - How Great Leaders Inspire Action - It's important to understand that this isn't about a particular company like Apple though it is a good example. Why are they so innovative? This is about how your brain functions and how emotions are more powerful than logic. It's a study in Neuromarketing and brand attachment. What else is at play here? There is a pattern, they all think in a similar way – Martin Luther King, The Wright Brothers etc. Its called the “Golden Circle” – which explains why others are more inspiring than others. Think from the inside out – its about thinking differently – challenging the status quo. *They buy why you do it.* Its about how our brains process information – both how we “feel” and what we think. How is someone loyal? Goal is get people to believe on all levels what YOU believe. Click above to view more.

<http://www.youtube.com/watch?v=u6XAPnuFjJc>

--RSA Animate The surprising Truth about what motivates us. This lively RSAanimate, adapted from Dan Pink's talk at the RSA, illustrates the hidden truths behind what really motivates us at home and in the workplace. To motivate – you get more of the behavior you want if you punish you get less of it. Once you get above rudimentary cognitive skill...the rewards don't work with simple incentives as would be assumed. For simple straight forward tasks...with clarity did well. But the more complicated the task with more conceptual thinking...the worse people did. FACT: Money motivates at work...but it needs to be enough to be motivating. Pay enough so people aren't worried or thinking about the money then it works, but what works the best? Top three things to motivate employees: autonomy, mastery and purpose are the three top factors to motivate people. It's about being satisfied and rewarding in the accomplishment itself. People doing highly technically challenging work, of whom already have jobs and do this extra technically sophisticated work on their own time....why? Click above to view more.

The Employee Development System

Purpose

To improve employee results and performance in a specific area, in a way that promotes the Employee's professional and personal growth, and enhances the employee-manager relationship. It provides a value –added to the employee and manager, creating a mutually respectful relationship.

Benchmarks

1. Identify employee goals (*are they in alignment with the company goals/values?*)
2. If there are issues blocking the commitment – identify and address them. What are they having problems with?
3. Create a plan. Set goals or metrics for employee development or advancement – do they need a mentor? Training? More opportunity of autonomy?
4. Get employee's commitment to meet milestones.
5. Outline ways to assist with roadblocks. (i.e. where to get help and/or support)
6. Set a date for re-evaluation and re-evaluate the employee's performance and results.

Standards

- Performance and any development issues to boost an employee's already satisfactory performance to a higher level (employee development).
- Assist in addressing any frustrating the employee may be having and bringing it to light to move on in developing them with the company.
- Begin a documentation process for employee tracking in development in writing.
- This can be used to improve benchmarks, reporting loops, standards, and time frames.
- Accountability. The consequences of the employee not following through on his or her commitment to improve puts all responsibility on the employee.
- Commitment to the company and a plan the employee has agreed to will be followed up by the manager at regular Employee Development Meetings or at meetings specifically scheduled for this purpose (The employee's performance will be re-evaluated to determine if improvement is being achieved. If the employee is adhering to the plan, both in substance and in spirit, but if the improvement is not satisfactory, a revised plan should be developed and implemented).

Note: This is a team (collaborative) approach. It's just as important to get employee feedback as it is for you to communicate the company goals. This also gives you, as the employer the opportunity to be supportive of your employees in an effective and productive manner. It's a way for the employee to take on the responsibility of producing the result, and offers the manager's guidance in exploring ways to do it.

First Employee Development Meeting Agenda Example – Aligning Goals

Employee Name_____

Meeting Date_____

Discuss Ground Rules for Our Relationship

- What you can expect from me
- What I expect from you
- What you need from me

Provide Overview of Employee Development Meetings

- Purpose - To promote employees' professional and personal growth by working together to overcome obstacles in the way, and to provide a place to be vulnerable, to take risks, and to learn so that employees can be their best and achieve results they can be proud of. (*Ask yourself: Do metrics need to be put into place? Is this clear?*)
- Logistics - Participants: manager and individual employee
Frequency: Weekly? Monthly?
Duration: 30 minute check in or one hour? Lunch?
Location: Manager's office, conference room or out of the office?
- Content
Performance coaching, work issues, personal issues, interpersonal issues, administrative issues. Clarify any roadblocks, issues and address them head on.

Review Current Work Elicit Employee's Primary Aim

- What you don't want
- What you do want
- Ideas in the way of getting what you want
- "Busting" ideas in the way
- Statement of employee's Primary Aim

Schedule Regular, Ongoing Employee Development Meetings

Employee Development Meeting Agenda Example

Employee Name _____ Meeting Date _____

- Key Objectives (this Meeting And Action Items For The Next Meeting) As Well As Items Carried Over
- Review Work in Progress (Mentoring Possibilities?)
- Identify and Resolve Work Issues And/Or Personal Development Issues
- Other Items To Discuss
- Confirm Or Schedule Next Employee Development Meeting

Creating & Assigning Effective Employee Objectives

Policy:

Selecting and stating clear, measurable short-term objectives provides both manager and department member with a focus for moving forward successfully. Effective managers begin planning by selecting and stating the long-range goal and short-term objectives. They then select appropriate materials, strategies and methods, and evaluation techniques to teach and measure the accomplishment of the objectives that lead toward achieving the goals. When department members understand clear and measurable goals and objectives, they become aware of what their manager expects them to accomplish, and how it relates to the overall mission of the Company.

An effective Objectives Creation & Assigning System:

- Provides analysis of an employee's job performance as it relates to specified objectives
- Is useful as a development tool to improve the employees understanding of objectives, and the employees overall performance
- Helps establish and clarify new performance objectives
- Supports the strategic goals of the Company

Ideal system to use:

- To assign **SMART** (**S**pecific, **M**easurable, **A**ttainable, **R**elevant, and **T**ime-bound) objectives for a given period
- To evaluate accomplishments and milestones associated with each assigned objective
- To utilize the evaluation results of the assigned objectives
 - To create new objectives that enable the employee to move toward achieving specified goals

Procedure:

- Study the employee's most recent past evaluation before creating newly assigned objectives for which the employee will be assigned and evaluated on.
- Use **SMART** (**S**pecific, **M**easurable, **A**chievable, **R**elevant, and **T**ime-bound) objective-setting guidelines when creating newly assigned objectives

Employee Performance Improvement Plan

MEMORANDUM

TO: _____
FROM: _____
DATE: _____

RE: Performance Improvement Plan

I. INTRODUCTION

This Plan addresses certain concerns we have with your performance. It is our hope that you will take the steps outlined herein to improve your performance.

II. CONCERNS

We have outlined below certain specific incidents in which you have demonstrated poor performance/poor behavior. For example:

-

III. PERFORMANCE OBJECTIVES

To remain employed with the Company, you must strictly comply with the objectives below over the next [insert reasonable period to complete objective, e.g., 60 days]. [We have also included suggestions that we hope will help you achieve these objectives.]

The performance objectives are as follows:

-

Again, we intend to strictly monitor your performance over the next [60] days for compliance with these objectives. Failure to meet any of these objectives during the [60]-day period could result in disciplinary action, up to and including immediate termination. Further, we expect sustained improvement in your performance. Should you successfully meet your objectives over the next [60] days, followed by a subsequent decline in performance, you may be terminated without further notice and opportunity to improve.

Please note that this document does not change your status as an at-will employee, and even if you successfully meet your objectives over the next [60] days, your at-will status would not change. Since you are an at-will employee, either you or the company can terminate your employment at any time, with or without cause, for any reason or no reason at all.

IV. YOUR COMMENTS

If you have any comments, please list them below (attach additional sheets if necessary):

[NOTE: WE SUGGEST YOU DELETE THE QUESTION BELOW UNLESS THE EMPLOYEE HAS GIVEN YOU REASON TO THINK SHE MIGHT BE ENTITLED TO A REASONABLE ACCOMMODATION FOR A DISABILITY]

Question 1: Do you need a reasonable accommodation from the company to meet the objectives described in this Performance Improvement Plan or to otherwise perform your job (please check yes or no)?

- Yes
- No

If you checked the “yes” box in response to Question 1, above, please describe the accommodation you need (attach additional sheets if necessary):

If you checked the “yes” box in response to Question 1, above, please explain why you believe you need an accommodation (attach additional sheets if necessary):

[NOTE: WE SUGGEST YOU DELETE THE QUESTION BELOW UNLESS THE EMPLOYEE HAS GIVEN YOU REASON TO THINK SHE MIGHT BE ENTITLED TO A LEAVE OF ABSENCE OR REDUCED WORK SCHEDULE BECAUSE OF A SERIOUS HEALTH CONDITION]

Question 2: Do you believe that you need a leave of absence or a reduction in your working hours on account of any serious health condition you are experiencing (please check yes or no)?

- Yes
- No

If you checked the “yes” box in response to Question 2, please complete the Leave of Absence Request Form that you will be provided.

I have read this Performance Improvement Plan in its entirety.

[Employee] _____ Date _____

[Manager] _____ Date _____ [HR Rep] _____ Date _____

Principles of Good Working Relationships

What Makes Working Relationships Work?

Unless you're a sole proprietorship, you've probably seen the effects of working relationships that *don't* work. Even the most cordial, pleasant, and diligent employees occasionally become annoyed, frustrated, or angry with their co-workers.

Working relationships that *do* work are characterized by open and respectful communication, accountability, and trust. These three characteristics go hand in hand; it's very difficult to have any one of them without the other two. Think about it. How can you trust someone who can't or won't be accountable for what they commit to? Yet, how can you be accountable for getting a result if you're not getting all the information that impacts the work you're doing?

Many business owners, managers, and perhaps even you, think there's not much you can do to improve the quality of communication, accountability, or trust in an organization.

People either possess these qualities, or they don't. After all, you can't make someone a better communicator, more accountable, more trustworthy, or more trusting, can you?

Yes, you can.

Although you can't force someone to be better at these things, you can create an environment where these qualities are valued and where systems are in place to promote and help cultivate them. This can be accomplished by setting out principles for the way people work together. Principles of working relationships between management and employees are cornerstones of our company's rules of the game. They help build and sustain a working environment based on respect and trust through our direct communications with one another and taking personal responsibility and accountability for ourselves and our actions.

Management and employees include these elements:

- The manager and employee have agreements about what work is to be done and how and when it is to be done. Often, these agreements are expressed in documented business systems.
- Any changes in the work requirements are made only after mutual agreement between the manager and the employee.
- The employee takes on full accountability for performing the work and achieving the results as agreed, and the manager is accountable for providing the employee with the resources and guidance needed.
- Exceptions are reported immediately. The employee is accountable for notifying the manager, and any other affected people, in writing if the work will not be performed or the results will not be achieved as agreed.
- The manager also notifies the employee if commitments made by the manager cannot be achieved.
- The manager can assume the work is being performed as agreed unless otherwise notified.
- Periodic check-ins between the employee and manager, called "reporting loops," are the main vehicle for keeping each other informed about how work is progressing.
- Failure to notify of exceptions or missed due dates is not acceptable.
- Relationships built on trust are developed as managers and employees keep their commitments and successful results are achieved.

Principles of Good Working Relationships Implementation Checklist

This checklist will help you transform the ideas in this process into action and into results in your business. Check off each policy you will implement and write in the implementation date. Set a follow-up date (for example, in 3 or 6 months) to review each policy and its impact; write in your comments on the worksheet at that time.

POLICY	IMPLEMENTATION DATE	FOLLOW-UP COMMENTS
<p style="text-align: center;">MANAGEMENT BY AGREEMENT AND MANAGEMENT BY EXCEPTION</p> <ul style="list-style-type: none"> <input type="checkbox"/> We get agreement when discussing work to be done. <input type="checkbox"/> We notify the other party 		
<p style="text-align: center;">GUIDELINES FOR WORKING RELATIONSHIPS</p> <ul style="list-style-type: none"> <input type="checkbox"/> We understand the difference between line and staff relationships. <input type="checkbox"/> Everyone has only one primary manager. <input type="checkbox"/> People refer staff requests to their manager, when appropriate. <input type="checkbox"/> The owners adhere to line and staff relationships. <input type="checkbox"/> People respect each other's time, space, and need for concentration. <input type="checkbox"/> When a manager is absent, temporary accountability moves to the next position up the line. <input type="checkbox"/> Service systems are developed and implemented for staff support functions. 		
<p style="text-align: center;">DELEGATION AND REGULATION</p> <ul style="list-style-type: none"> <input type="checkbox"/> All delegations are given in writing and with a due date. <input type="checkbox"/> We get agreement before a delegation is considered final. <input type="checkbox"/> We use reporting loops to review and direct work. <input type="checkbox"/> We give timely and direct feedback. 		

Job Description (Blank Template)

Position Title:

Reports to:
Updated:
Position Type:
Classification:
Work Location:

Position Summary:

Hours:

Qualifications:

Essential Job Functions:

Area	Responsibility	Satisfactory Performance Metrics

Statement of the Position Holder:

I accept the accountabilities of this position and agree to produce the results, perform the work, and meet the standards set forth in this position agreement.

Signature: _____

Date: _____

Printed Name: _____

Statement of the Position Holder's Manager:

I agree to provide a working environment, necessary resources, and appropriate training to enable the accountabilities of this position (results, work, standards) to be accomplished.

Signature: _____

Date: _____

Printed Name: _____

Job Description Example – Operations Manager

Position Title: <<Your Company>> Operations Manager

Reports to: Joe Smith

Updated: Date

Position Type: Full-time, permanent employee

Position Summary:

The accounting/operations manager is responsible for the initial scheduling and optimization of resources within the accounting department. He/she is responsible for the training of the accounting department staff relative to our accounting services and the company’s brand promise. He/she is responsible for the aiding in the development of content relative to new product and service lines and quality assurance of existing and future product lines.

Hours:

Monday - Friday, 40 hour work weeks

Qualifications:

- 1-3 experience in operations and accounting.
- Excellent administrative, organizational, prioritizing, and follow-up skills.
- Detailed-oriented, self-directed and autonomous.
- Excellent computer skills with Microsoft Office and Excel.
- Maintain confidentiality of all corporate, financial and legal matters of company and clients.
- Experienced QuickBooks user, understand GAAP principals and financial statements.
- Driving to client locations, having a professional appearance, demeanor, and presentation style.
- Be pro-active, in tune with client’s needs, identify vulnerable areas, and develop processes to strengthen those areas.
- Open to new ideas and change, with the goal of always improving processes.

Essential Job Functions:

Area	Internal Role/Responsibility	Satisfactory Performance Metrics
Maintenance of Clients		
Accounting Client Work	<ul style="list-style-type: none"> ▪ Set up, oversee, and when necessary assist with the following client accounting functions: <ul style="list-style-type: none"> ○ Assist with implementation of budgets, financial goals/controls, various reports, etc. ○ Maintain GAAP compliance accounting practices. ○ Address any unusual accounting problems if possible, or ask for assistance if necessary. ○ Maintaining/improving client accounting checklists. ○ Maintain client’s books using accounting software’s features and functions. ○ A/P and other bookkeeping functions according to 	<ul style="list-style-type: none"> ▪ Follows and utilizes the <i>Company’s Procedures & Guidelines</i> for accounting functions. ▪ Provide required reports and financial statements to clients as needed. ▪ Submissions and communication to/with clients are clear and consistent. ▪ Current copies of accounting files on Company server. ▪ All accounts are maintained in accordance with GAAP as applicable to the client’s business. ▪ Update/utilizes Company’s Client

Area	Internal Role/Responsibility	Satisfactory Performance Metrics
	Company's procedures. <ul style="list-style-type: none"> ○ Set up and process payroll. ○ Reporting: P&L, balance sheet, vendor balance detail, customer balance detail, payroll, etc. ○ Consistently back up files. 	Specific Procedures & Guidelines internally and at client site. <ul style="list-style-type: none"> ▪ Updates and maintains the following checklists according to procedure: <ul style="list-style-type: none"> ○ Bookkeeper Checklist ○ Manager's Checklist ○ Annual Checklist ○ Year End Checklist
Production & Service Scheduling and Management		
Resource Management - Scheduling	<ul style="list-style-type: none"> ▪ Objective is the retention of long-term, quality clients and optimize profitability for the Company through the development and implementation of productions, and service delivery systems in accordance with our marketing message and contractual obligations. Ensuring that clients' expectation and the company's financial standards are met or exceeded. ▪ Review and optimize employee calendars and schedules within the accounting department to deliver optimal performance of profitability and employee retention. ▪ Maximize Company's profitability by efficient and effective scheduling of resources. ▪ Schedule senior staff and appropriate personnel for regular client QBR's. ▪ Update HR to ensure proactive hiring system is on track for continued expansion of Company's services. ▪ In conjunction with Sales and Accounting Management team, identify Company's team members who will carry out client fulfillment functions and who will be maintaining primary responsibility for the client (client leads), and accurately document. 	<ul style="list-style-type: none"> ▪ Confirm appointments to avoid last minute cancellations – for efficient scheduling to accommodate travel schedule. ▪ Consistent weekly verbal or e-mail communication regarding completed work and new suggestions of upcoming work to accounting staff. ▪ Prepare assigned reports on schedule. ▪ Continuous Improvements to system procedures. ▪ Operational responsibilities are delegated appropriately. ▪ Assigned Company's staff to begin work with a good understanding of the new client's needs and the scope of services engaged. ▪ Consistently scheduled and repeatable client QBR's Schedule reports to management.
Training Management and Support		
	<ul style="list-style-type: none"> ▪ Objective is to support the acquisition and retention of quality clients that support the strategic objective by developing training systems and training of individual staff members to ensure the delivery of Company contractual obligations to clients. ▪ Maintain and improve training system for 	<ul style="list-style-type: none"> ▪ Staff is well trained. ▪ Successful completion of training checklists. ▪ Well documented training procedures and systems, with consistent updating as needed for training improvements. ▪ Accurate documentation all

Area	Internal Role/Responsibility	Satisfactory Performance Metrics
	oncoming employees. <ul style="list-style-type: none"> ▪ Schedule training for employees on production calendar. ▪ Provide reporting for training to upper management. ▪ Make recommendations and make improvements to training modules as appropriate. 	communications. <ul style="list-style-type: none"> ▪ Consistent follow-through and follow-up.
Quality Assurance Management		
	<ul style="list-style-type: none"> ▪ Objective is the retention of long-term, quality clients through the development and implementation of quality control systems. ▪ Meet contractual obligations to ensure clients' expectations are met or exceeded. ▪ Report to department heads when issues or opportunities are identified. 	<ul style="list-style-type: none"> ▪ QBRs assigned and/or performed regularly (quarterly) for every existing client. ▪ Subsequent follow up action items are communicated and followed through on by appropriate staff.
Meetings, Administrative, and Internal Responsibilities		
Reports/Admin/Meetings	<ul style="list-style-type: none"> ▪ Update your calendar. ▪ Update/Submit time sheet weekly. ▪ Submit expense reimbursement (time frame?). ▪ Lead weekly Accounting Meetings. ▪ Check emails at least twice a day. ▪ Weekly update meeting with Accounting Director. 	<ul style="list-style-type: none"> ▪ Report any difficulties with too much or too little work load. ▪ Submit timesheets/reimbursements on time. ▪ Be part of the team and contribute to the group with ideas, questions, updates, etc. ▪ Respond to emails within 12 hours.
Meetings and Presentations	<ul style="list-style-type: none"> ▪ Prepare meeting times with client to make presentations or recommendations regarding implementation of new company systems. (I.e. progress and transitions – new accounting procedures, etc.) 	<ul style="list-style-type: none"> ▪ Presentation materials are clean and effective and professionally designed and presented for professional experience for client.

Statement of the Position Holder:

I accept the accountabilities of this position and agree to produce the results, perform the work, and meet the standards set forth in this position agreement.

Signature: _____

Date: _____

Printed Name: _____

Statement of the Position Holder's Manager:

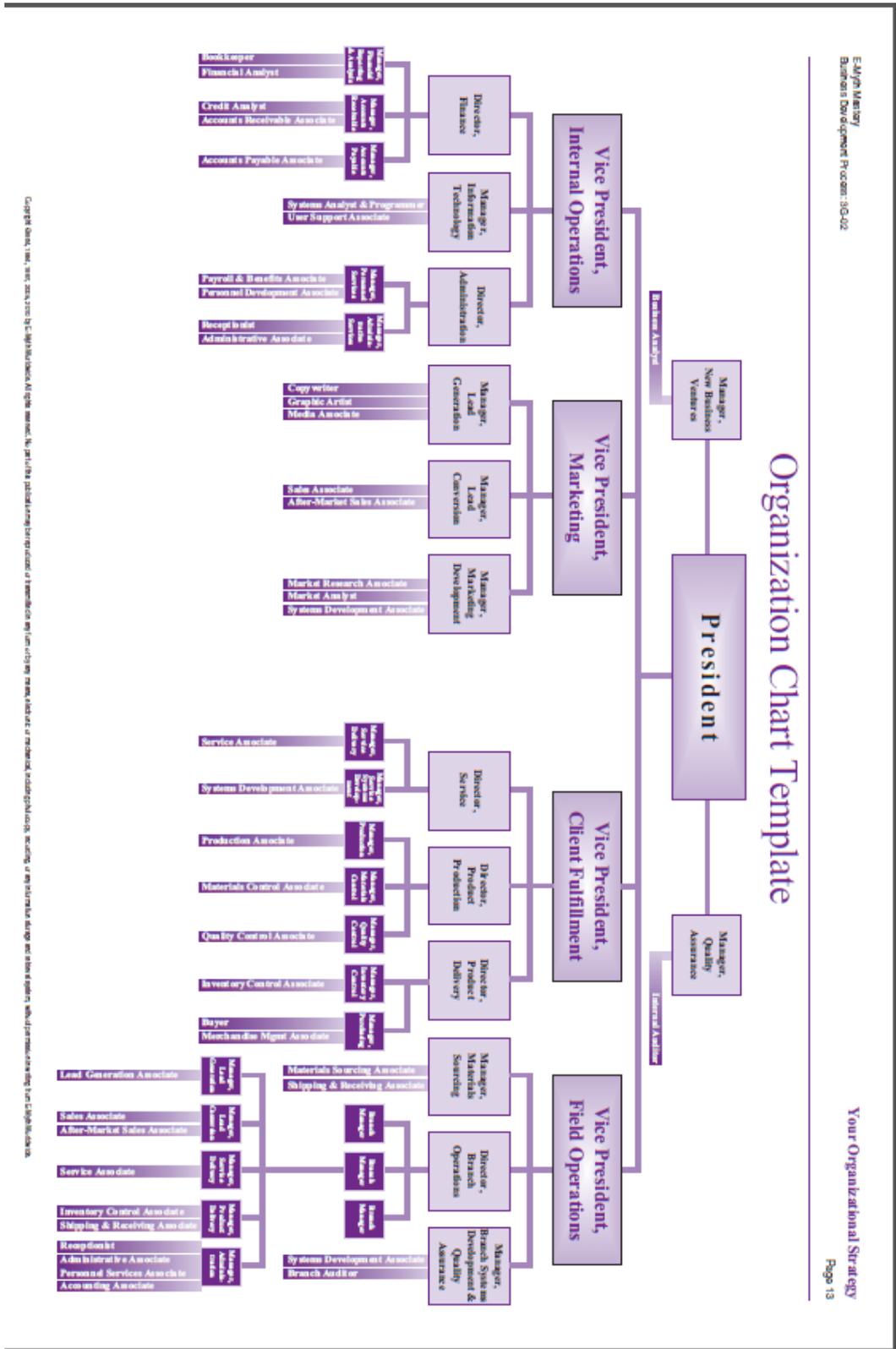
I agree to provide a working environment, necessary resources, and appropriate training to enable the accountabilities of this position (results, work, and standards) to be accomplished.

Signature: _____

Date: _____

Printed Name: _____

Org Chart - Example



About Pacific Crest Group

Pacific Crest Group was founded by a team of entrepreneurs with solid experience in accounting, finance, human resources and IT. We've built our business in the San Francisco Bay Area by adding staff with expertise in human resources and employee development, business development, and information technology.

Our services encompass both high level consulting that enables clients to make better decisions and achieve strategic goals, and outsourcing of back-office functions such as bookkeeping, HR, and IT administration that reduce costs and increase performance.

Our Mission

Our mission is to help your business become more successful in your terms. For some clients, this means dramatic financial growth; for others, it's about running more efficiently, or focusing on your customers instead of back-office administration.

PCG approaches financial and business management much like doctors treat patients. Certain circumstances call for the resolution of a specific isolated problem, while others require a more holistic approach that considers many aspects of a business' well being.

We eliminate obstacles to your success—for example, inadequate financial processes or cumbersome IT systems—and to enhance your most valuable resource, the people who work for you.

Beyond our unparalleled competency in accounting and HR, Pacific Crest Group's real strength lies in our ability to recognize organizational needs and opportunities for improvement. We know how to optimize and integrate your financial procedures, computer systems, and human resources matters, such that you can focus on what you do best and grow your business to its full potential.

What Pacific Crest Group's Human Resources Consulting Targets

Pacific Crest Group's consulting services target what is most likely your largest business expense – your employees – with the goal of helping you build the strongest, most productive team possible. From analyzing your compensation structure, to helping develop your leaders, to navigating high-risk situations with problem employees, our consultants work with you in a way that suits you and your business, not just the average business.

- Advanced Leadership Training
- Professional Development for EEs
- Establish Policies & Procedures, Standards for behavior
- Recruiting, Hiring, Terminations
- HR compliance and payroll

For more information about our company visit our website at: www.pcg-services.com or call us at 415-461-2586 for any questions.