INSIGHT 008

DESIGNING PERFORMANCE SERIES

What the Review Can See

Kimberly Miller, EdD | Author | Executive Advisor | Speaker

Sit in that first quarterly review for a minute, the way your managers did, because that afternoon is where this story actually turns. The CFO is walking through Teresa's spending line by line, asking fair questions in front of her peers, and Teresa is answering each one well, while Paul, who runs a steady branch, has just returned his fund untouched and you are thanking him for keeping his costs tight through a hard quarter, and the whole room is watching both of them at once.

You put money where the decisions are this year and gave each branch manager a discretionary fund, approved by finance and backed by you, to keep a customer whole without asking anyone first. For years the hardest calls had kept ending up on your desk and this was the fix. Teresa used hers in the first month, flying a replacement part in overnight when a supplier missed a shipment, and later bringing in a temporary crew for a week when a new contract started early, which is the work this fund was built for. The part that came in overnight was for the hospital account, and they were back up the next morning.

By the end of the second quarter nearly every fund returned full. But the problems it was built to fix remained. A customer still waited most of a week for a part that could have arrived overnight, and the few calls that reached you opened with a manager asking whether you are comfortable before they touch the money. One manager called about work his best customer needed done that week. He had the fund, and he had the authority to use it, and he still wanted to hear you say it was all right first. It is easy to read that as people needing time to trust money that still feels like the company's, and some of that is probably right. Nobody in that room was wrong.

Go back to that first review and look at what it could see. That review had a line for every choice Teresa made with the money, while Paul received thanks for the funds left alone. Both responses are reasonable and appropriate. But there was no line item for the week the hospital account would have waited if Teresa had held back, and nobody asked about it.

Your managers took an accurate lesson from that afternoon, because spending the fund meant walking through each choice in front of the room, and leaving funds alone earned appreciation while the cost of waiting landed with customers, and no one in that review ever looked at it. Nobody set out to teach that, and the fund is every bit as real as the day you announced it, which is why each one that comes back full is an honest record of that afternoon.

Whatever the review can see is what people learn to protect.

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An Insight from Kimberly Miller, EdD

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