

Use Objective Criteria to Measure Performance

“If you can’t measure a goal, then don’t set that goal,” states Jeanne Murphy, Growth Strategist and President of Strategic Solutions. “Performance must be measured on an objective basis. You can’t just go on gut feel. Feedback needs to be objective, specific, and accurate – something you’ve either seen, heard, or read [data].”

“Employees want specifics and numbers. Just saying *you’re doing a good job this month* isn’t effective. Instead, they’re eager to hear something like *asking questions to find out more about that member’s situation really helped you uncover important ways to help her*,” Murphy says. “If people don’t know precisely what you like, they can’t repeat that performance to get another pat on the back. When I talk with employees – whether exempt or non-exempt staff – one of the greatest displeasures they have is being evaluated on subjective criteria.”

Evaluate Sales and Service

Measuring sales and service is equally important. “Sales without service won’t cut it in a credit union. It doesn’t lead to building long-term relationships,” Murphy says. “Some employees are exceptional at product selling. They crank out the numbers right and left. But are members happy? Do members feel like the employee gave them extra value? Or do members feel like they got shoved into something they regret buying?”

Besides tracking sales numbers, be sure to track member satisfaction at the employee level. Every transaction that occurs can be linked to a specific individual. Third-party providers (or your in-house technical experts) can randomly select members for surveys conducted through post cards, phone, online forms, etc.

To track satisfaction by employee, ask members *did the employee...*

- *help you to feel welcome and put you at ease?*
- *ask you questions to more fully understand your needs and situation?*
- *recommend solutions that seemed appropriate for your situation?*
- *help you make decisions from the options presented?*
- *let you know what the next steps would be?*
- *thank you for your business?*

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