**Quarterly Review Meeting**

A leader's ability to conduct effective quarterly meetings significantly influences our commitment to prioritizing our internal partners. We recognize that a leader's responsibilities are often driven by the needs of their partners, making much of the role reactive. Quarterly review meetings offer a proactive opportunity to evaluate performance, establish meeting flow, and develop strategies that positively impact careers. These INDEPENDENTLY run meetings also provide a chance to correct any misguided coaching given during the quarter. Let's explore the purpose, your role, and key details to ensure a successful meeting.

**Objective:**

Build trust and impact career progression through effective communication of culture, performance, and strategy with partners that are meeting baseline standards.

**Your Role as a Leader:**

As a leader, your role in these meetings is pivotal. You are the facilitator, the strategist, and the coach. It is your responsibility to accurately evaluate your partner, guide the conversation, ensuring that it remains focused and productive. Your leadership will set the tone for the meeting, making it a space where partners feel valued, heard, and motivated to contribute their best.

**(Need an Image/Flow of Evaluations, Determine Meeting Flow, Meeting Execution & Follow Up)**

**Step 1: Evaluating Against Our Baseline Standards:**

To ensure that these meetings are productive and meaningful, it is crucial to evaluate partners against our baseline standards, as outlined in the DBO Manual. These standards should create an outline and tone for the meeting.

1. **Attitude:**

Attitude plays a significant role in a partner’s overall performance and their impact on the team. This evaluation is subjective, but it is essential to maintain high standards. An attitude score below 7 out of 10 is considered unacceptable. Leaders should observe and assess partners’ attitudes towards their work, colleagues, and the organization, noting any areas that require improvement.

1. **Performance**

The performance of your partner is NOT subjective. Rezult provided you with training and many tools to objectively evaluate the performance of an individual. The correct knowledge and use of Performance Manuals, IDPs, Weekly Activity Reports, KPIs and GP Graphs provide a detailed snapshot of performance. This data should clearly define both effort and efficiency.

KEEP IT SIMPLE: Gross Profit OR great effort on our best practices.

1. **Culture**

As a leader, your primary responsibility is to build and lead a team that emulates our company culture. Think of culture as the compass of your vessel, guiding every action and decision. Your team’s culture is a summation of everyone’s individual impact on the culture, and it is essential to ensure that this impact is consistently positive and aligned with our organizational values.

Everyone’s actions contribute to the overall culture. Therefore, it is crucial to evaluate whether these actions are consistently helping or hurting the team’s culture. We are looking for both consistency and growth. Are team members consistently demonstrating behaviors that align with our values? Are they showing progress in embodying the culture we strive to create?

**(Need an Image of Attitude, Performance, Culture)**

**Step 2: Determining Meeting Flow from Evaluation**

Effective quarterly meetings must be tailored to the specific needs and statuses of each team member. This personalized approach ensures that the meeting is relevant and productive for each individual, addressing their unique circumstances and fostering their growth and development. Here's how to determine the flow for different types of performers:

1. **New Hire / New Position:** For individuals who are new to the team or have recently transitioned into a new role, the focus should be on education and understanding the purpose of the meeting. Explain the 'whys' behind these evaluations and meetings to ensure they understand how their performance is measured and why it matters. This foundation helps new members integrate seamlessly into the team and align their efforts with organizational goals. *(1.5 Hour Meeting)*

*Meeting Flow:*

1. *Objective Overview*
2. *Standard Meeting Guideline*
3. *IDP Overview*
4. *KPI Overview*
5. *Responsibility of Team Member*
6. **Positive Progression (Standard 1-5):** For team members showing steady and positive progression, the meeting should follow a standard structure. Evaluate baseline standards, provide feedback on their current performance and culture, and set new goals to continue their growth. Celebrating their successes while identifying opportunities for further improvement keeps them motivated and engaged. *(1 - 1.5 Hour Meeting)*

*Meeting Flow:*

1. *Accountability of Strategy Goals from Previous Quarter (Celebrate or Challenge)*
2. *Evaluation and Communicate Performance (Effort & Efficiency)*
3. *Evaluation and Communicate Impact on Culture*
4. *Set Deliverables for Quarterly Strategy*
5. *Current and Career Path Discussion (Why are you here?)*
6. **Stagnant / Under Performance:** When dealing with stagnant or underperforming partners, the focus should shift to discussing culture and identifying challenges. Understand the root causes of their performance issues and explore how their actions impact the team’s culture. Provide constructive feedback and create a plan to address these challenges. Emphasize the importance of cultural alignment and consistent effort to improve their performance. *(15 Minutes – 1 Hour Meeting)*

*Meeting Flow:*

* 1. *Determine and Communicate Baseline Standards to Keep Position*
  2. *Investigate Core Reason for Under Performing & Set Defined Parameters to Coexist*
  3. *Discussion about Change in Ongoing Support and Quarterly Meeting Moving Forward (If Transitioning)*

1. **High Performer:** For high-performing individuals, the meeting should focus on support and career development. Acknowledge their exceptional contributions and discuss potential career advancement opportunities. Identify ways to further support their growth, such as additional training or new responsibilities. This approach not only retains top talent but also encourages them to continue striving for excellence. *(15 -30 Minute Meeting)*

*Meeting Flow:*

* 1. *Review Quarter Results*
  2. *Determine What Type of Additional Support they Want/Need*
  3. *Discuss Any Specific Change in Career Goals (May not need if they want to stay in position.)*

**Step 3: Executing An Effective Quarterly Meeting**

**POSITIVE PROGRESSION**

As leaders of a group or individual we must truly evaluate and communicate the details effectively in our quarterly meetings. For those showing focus, dedication and skill at accomplishing goals this is an opportunity to celebrate achievements, redirect efforts, evaluate strategy and begin the process of moving the goals further to allow for future growth. This presents you as their leader with a tremendous opportunity to collaborate with them and strengthen the team.

1. **Accountability of Strategy Goals from Previous Quarter: (10 mins)**

Strategy goals are created by the office leader and refined by individual producer every 13 weeks. The main purpose of IDP goals is to create immediate focus (exclusively for a 13-week timeframe) centered on areas of **metrics** and **culture** in support of our baseline standards**.** Goals are created and documented on the ‘Metrics and Culture’ tab of the IDP. Your role as a leader is to determine if these strategies were accomplished by the producer. To accomplish this, the leader must review the performance against these goals. Using KPIs, Activity Reports, Meeting Notes, and GP Graphs should paint a fairly clear picture if goals were accomplished.

Rezult Group to add (Image of a IDP ‘metric and culture tab’)

Reviewing and discussing these goals should give you an accurate view of how engaged and disciplined they were in the quarter which generates mutual trust**. Important, these goals are evaluated on a pass or fail basis.** There should not be any subjectivity. These goals are created to be definitive and therefore should be evaluated the same.

In addition, you should be investigating the ‘How’ or ‘Why’ depending on performance. How an individual is achieving or not achieving goals is important in your future leading and coaching that individual.

***‘Yes, the goal was achieved.*** *Your follow up:* ***‘Great, congratulations, how did you accomplish that?’***

***‘No, the goal was not achieved.*** *Your follow up:* ***‘Why were you not able to accomplish this?”***

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**(Need an Better Image for Setting Goals & Achieving/Not Achieving them)**

The answers to these questions will set the tone for the type of meeting you will run. The point of this exercise is to definitively determine ***growth*** or ***no growth***. At this point you should know which applies for this quarter.

If strategy goals and tasks have been accomplished, the meeting will be a celebration of achievement. Both for them and for you. You have identified and helped lead a person to growth. Congrats! There are still likely areas to focus on and discuss as the meeting progresses. But overall, you have a positive team member and should feel confident in your investment of them.

If goals are not met, you have some maneuvering to do. Maybe some direct conversations, maybe a change in strategy, maybe a change for that team member. It is your job to figure out the best way to make the most positive impact for them and your team. The rest of the meeting will hopefully make those decisions clearer. What should be clear is we cannot miss strategy goals consistently.



1. **Evaluate and Communicate Performance (Effort and Efficiency)**

Team member performance is a combination of focus, efforts, and efficiency performed throughout the quarter. Your job as a leader is to determine if your team member has CONSISTENTLY performed at a high enough level. GP Graphs, IDPs, and KPIs will provide should provide you enough objective data to accurately pinpoint performance.

**Gross Profit Goal:** (5 mins)

GP is a picture of the results of the team members’ performance. The majority of the time, GP reflects performance. This review should be straightforward, simply reviewing the GP graph to make sure the proper conclusions are being drawn.

* Where are you in relation to goal?
* How are you trending based on this quarter +/-?
* Are you paying attention to your graph? Know how to read it?
* What should is the next goal we need to hit (quarter / yearly)?
* What needs to happen for us to achieve this next milestone?
* Do you see the correlation between your other professional goals and GP?



**(Need a Better Image of Graph/Growth line for metrics)**

**KPI / Metrics Goals:** (10 mins)

This is an objective part of the meeting but still deserves a leader’s interpretation to make sure outbound effort is being understood, managed and direction appropriate. KPI’s accurately measure effort and efficiency of an individual and/or team’s performance.

KPI goals are determined based on years of empirical data (evaluated regularly) and created to guide individuals toward success by measuring both effort and efficiency in their job.

Rezult Group to add (Image of a KPI report)

**Activity (in the middle):**

This is the middle section of the metrics. Measures the amount of horsepower being delivered in certain areas and displays efficiency in a team member’s performance. Performance in these areas should guide you on how to assess and drive strategy.

**KPI Goals & What Story They Tell**

Metrics are designed to build upon one another. Example: Outbound calls leads to New Contact, New Contacts lead to New Meetings, New Meetings lead to Lunches, lead to Requirements, etc.

* Percentage of goal independently represents performance against required standard.
* An increase/decrease within chain of activity goal progression illustrates efficiency
* Use these efficiency markers to guild your focus for coaching and building strategies
* Explain how these are interconnected and insert this is future strategy (IDP)

Making these connections in individual metrics areas will reinforce the importance of growth in those areas and how they work together in further success. Below is a brief breakdown of how you should use the KPI to evaluate a team member.

**Overall Performance%:** Ideally would like to see at 100%+ but if not, there are still areas to explore.

**Effort**: These are positively due to personal effort (Outbounds, CC Entered, CN Entered, New Contacts, Job Applicants). These should be areas over 100% or they are just not giving effort or possibly understand how to document. Consider these a barometer of sheer effort.

**Conversion:** These are progressive activities (meetings, new meetings, lunches, AI’s, submittals…….) identify our ability to convert our efforts. A team member’s ability to convert on effort will determine how much effort one must have.

Example: What does it represent if a BDP is 100% of new contact goal, but 60% of new meeting goal?

Answer: The BDP is either not calling the right contact or they are not converting at a high level.

Solution: Change who the team members are calling or coach to more effectively overcome objectives.

**Value (?):** The primary purpose of effort and conversion is to attain opportunities for us to generate revenue. Reqs, submittals, interviews and fills are the areas where we add direct values to clients and consultants. This is the most important group of KPI’s and the one that every individual should be progressing to. If a producer is getting stuck here:

* Do they know how to have proper business conversations?
* Are they asking for ‘the business’?
* Know how we generate revenue, what the ultimate goal is?
* Are we talking to / meeting with the right individuals?

**Efficiency (the outside boxes):**

These are the outside graphs also represented in the KPI’s. The graphs take the production displayed in the middle and place then into ratios of efficiency. Thus, correlating to phases of the recruiting cycle and sales cycle.

As a leader, your responsibility is to provide coaching around best practices, create strategy in IDP, and aid in focus through weekly meetings to drive efficiency up. This way, your team members and entire group will experience more success.



**(Need an Image that shows Efficiency)**

**Fill Ratio (sales support):**

These measurables will quickly give you insight into the quality of business being developed. If this metric is % is not achieved, you may need to dive in the positions themselves and decide the following:

* Are there enough positions to give a true representation (see req goal)?
* Are we scoring positions accurately?
* Are we recruiting positions effectively and effectively?
* Is there one or more clients who are dominating the efficiency data

**Requirement Quality (sales):**

NEED DATA ON REQUIREMENT QUALITY

**Candidate Accuracy (recruiting / sales support):** Associates mostly with the phase in recruiting of ‘ID Perfect Candidates’. Anything under goal here could indicate a problem with acumen or the ability review a requirement and be able to find skills and experience that matches

**Time to Submit (recruiting / sales support):** Associates mostly with the phase in recruiting of ‘Sourcing Candidates’. A simple formula; the days in the quarter divided by the number of submittals in that quarter. Across the totality of the quarter this efficiency should give you a general understanding of how quickly this person can move through the processes and drive for results (submittals).

**Interview to Hire (recruiting / sales support):** Associates mostly with the phase in recruiting of ‘Screening Candidates’. Anything under goal here could indicate a problem with moving through AI’s, lockdown, referencing, candidate prep, etc. Further investigation, particularly if it happens over multiple quarters, may be needed.

**Successful Placement (recruiting / sales support):** Associates mostly with the phase in recruiting of ‘Retaining’. This is a formula, number of finishes in the quarter divided by number of successful finishes. Anything under goal could indicate a noncompliance with 360degree feedback or also even gaining commitment in the lockdown process, etc.

**3. Evaluation and Communication of Impact on Culture**

This portion of the meeting will and should be the longest and strongest section of your quarterly meeting. This stems from the belief that this is where you, as the leader, should make the biggest impact with your partners.

To start, does your partner know and understand Rezult Group’s culture? We must start this part of the meeting by evaluating the partners’ actions against each defined part of our company culture.

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When we look at our pyramid and evaluate our partners against the culture how do we start? Whether you give trust from the beginning, or your trust must be earned we have to ensure we are setting proper expectations for each business partner. All areas of the culture should be started low, typically between a one and a three with explanation, to allow for growth, goals and improvement as each partner progresses and becomes a stronger team member.

It is now time to detail every level of our culture and it all starts with trust.

1. TRUST

Everything starts with **TRUST**. Personal and professional trust are essential in every healthy culture. Your focus in this section of the pyramid is on professional trust. Trust and being trusted to think team first and perform at a high level is the foundation of our culture. What actions/responsibilities can impact or build professional trust with your partners?

**(Need a better Image/flow chart)**

After evaluating your partner from the quarter and considering the above-mentioned areas and actions that impact professional trust you will move to discussing individual business partners impact on your team culture. Every action should be viewed as helping to build culture or causing harm to culture. Below are examples for this section of your meeting:

**Example**: “John when it comes to professional trust, I believe there are some areas you need to grow. Your efforts from last quarter make me not trust that you are taking this seriously and here is why (insert areas performance was missed based on metrics data).”

**Example**: “Chuck you did a great job executing on the goals/strategies from last quarter. I can trust that you are (insert area performance was hit based on metrics data)! Great job Chuck!”

1. Communication

The next level of our culture to be evaluated is **COMMUNICATION**. While the foundation of our culture is trust, communication is key to every successful culture and relationship. We define communication as the ability to proactively have healthy unfiltered dialog and debate that creates transparency. We believe this fosters an environment that allows partners to focus on the task at hand rather than political positioning. What are actions/responsibilities that can impact or build proactive communication with your partners (individually)?

|  |  |
| --- | --- |
| RECRUITER | * RedZONE * Weekly Meetings * CAP * Target Recruit documentation (meetings, AI, Lockdowns, Lunches) * Recruiting Struggles * Issues with available tools (Target Recruit, Job Boards, ZoomInfo, LinkedIn, etc. * Submittals to BDM * Empire building/Negative Team communication |
| BUSINESS DEVELOPMENT MANAGER | * RedZONE * Weekly Meetings * TRANSITS * Requirements in Target Recruit * Target Recruit Documentation (Meetings, New Contacts, Lunches) * Recruiter Requirement Meeting * Sales Struggles * Issues with available tools (Target Recruit, Job Boards, ZoomInfo, LinkedIN, Indeed Alerts, etc. * Submittals to clients * Empire Building/Negative team communication |

Position Areas of Communication

**(NEED IMAGERY FOR THIS Table)**

The above-listed areas are outlined to allow you, as the leader, to identify the accuracy of how your partner consistently proactively communicates thus allowing you to determine how successful they are or are not in this area of the team culture. An example of this is:

**Example**: “John you are struggling with proactive communication [discuss specific example of area partner is falling short]. You must grow in this area so that you can be a better part of this team.

**Example**: “Chuck, you are doing a great job proactively communicating [discuss specific area partner is meeting or exceeding expectations]. This has a very positive impact on culture and builds trust with me and your team members. Thank you and keep it up!”

There is an old saying that actions speak louder than words. It is important to note how things are communicated and not only what is communicated during this time.

**(Need a better Image/flow chart)**

1. Standards

The third level of Rezult Group’s culture is **STANDARDS**. Our standards allow us to clearly establish and hold ourselves accountable and others to the highest standard. Standards define everyone’s performance and commitment to being a great team member! To evaluate your partner against standards you simply evaluate them against three following questions:

**(Need a better Image/flow chart)**

Each leader should be able to answer yes to each of the above questions for all team members. If you cannot and do not see a clear path of growth for a partner, then they should not have a place on your team. In a fairly straightforward evaluation and, again, using your analysis of your business partners quarter you will provide your answers and explanations to the following:

**Example**: “John, let’s discuss our standards and my evaluation of you as a partner. Can you tell me our three standards? Great! Let’s talk through each one and my evaluation of you.”

1. Are you a good team member?
2. Do you come in with a good attitude?
3. Are you putting forth great effort on our best practices or above your gross profit goal?

Moving to the next level in our culture can be exciting or a place that you will continue to challenge your partners, Accountability.

1. Accountability

The fourth level of our culture pyramid is **ACCOUNTABILITY**. Each one of our team members is accountable to the next. Holding ourselves and others to Rezult Group standards is the final step in invoking true teamwork. The key to this part of the culture is that each partner is holding themselves accountable first and foremost. There is no need to worry about your neighbor if you are not doing your job.

Some examples to support this section of your culture conversation:

**Example**: “John, one of the things that I really need you to grow in this quarter is accountability. I appreciate you wanting to help others and get them on track but you have to make sure you are accountable to your own efforts first. An example of this is……..”

**Example**: “Chuck, I truly appreciate your effort this quarter and you did a great job keeping yourself accountable. I would like you to focus on helping those around you with their accountability. You did such a great job [insert example] can you help create accountability within the group by [insert example here]?”

When trust is there, proactive communication is easy thus making standards easy to achieve and accountability at an all time high!! Once an individual is hitting those areas at a 7 or higher than then final part or our culture happens: Results!

1. Results

**RESULTS**, the top of our culture pyramid, will follow if the team is accountable to one another. We accomplish individual success through collective efforts of the entire team.

One thing you will have to consider in this part section of your meeting is leading a partner that has shown you they cannot grow or that they have reached a ceiling of six (6) or below. A partner that does not have the ability to grow above a six cannot stay a part of your organization/team.

Again, this section of your quarterly meeting is designed to have the biggest impact on your team members. Every action and statement made by your business partner helps build culture or hurts your culture. You and your business partner should be able to write well, thought out, and concise goals after this section!

1. **Set Deliverables for Quarterly Strategy**

This portion of the quarterly meeting should start with knowing if pervious deliverables have been met and your confidence of what new deliverables and strategies should be assigned. *If previous deliverables were not met this section of the meeting will not take place.*

Goals must be SMART = SPECIFIC, MEASUREABLE, ACIEVALBE, RELEVANT, AND TIME BOUND and be written about the partner you are meeting with!

These goals are set by the leader and should be created from your evaluation of your business partner from the previous quarter. The writing of the actual goal and supporting task will be authored by the business partners and are signed off on by the leader once completed. *Note: This process should take no more than one week.*

1. **Current and Career Path Discussion**

This section of the meeting will always take place. During this time of your quarterly meeting, you are identifying and talking through why individual business partners are here!

There are two defined paths for this section of the meeting, positive and negative:

1. Positive:

If you have identified that your business partner is CONSISTENLY performing the responsibilities of their job and is making a positive impact on your team culture it is time to talk about individual progression and what they want in a career.

There will typically be two goals discussed in this section of the meeting, a long term goal and a short term goal. The short term goals will always support the long term goal. Your job, is to move the needle with your team member so that well thought out goals (discussed in previous sections) can help them achieve movement towards success over the next thirteen weeks!

The below image is a visualization to support and assist with natural progression, with partners who consistently meet standards, if needed.

**CAREER PATH:**

**(Need a better Image/flow chart)**

$5,000 Sr. Recruiter $10,000 Stock Holder Leadership

New Hire

BDP $5,000 $10,000 Stock Holder Leadership

1. Negative:

If you are questioning why the business partner is here or there is no consistent growth from the previous quarter, it is time to directly communicate that if goals are not met, they do not have a place on your team.