



Continuing Education



Performance and team management

Learning Objectives

Explain how to set effective goals and objectives.

Describe ways to deliver and develop performance appraisals.

Describe the stages of team development.

Identify standard methods of communication used within teams.

Explain how to plan and conduct meetings, and describe ways to manage conflict.

This final article in a three-part series discusses performance and team management. Topics include: setting goals and objectives, appraising performance, developing teams, communicating within teams, conducting team meetings, and managing conflict.

Bruce A. Berger, Ph.D., professor and head of pharmacy care systems, Auburn University, Auburn, AL; and Martha Reeves, Ph.D., visiting assistant professor, marketing and management program, Duke University, Durham, NC, served as consultants for this article for the Certified Medical Representatives Institute Inc.

An effective manager sets department goals based on the overall mission of the company, and then works with each employee to develop individual goals or objectives. This process helps employees obtain better performance results.

A goal can be defined as an end that an organization or individual strives to attain. Goals are often in the form of statements that declare intended results. For example, a healthcare representative may have the goal of building relationships with new physicians and clinics. However, such a general statement may be difficult to monitor and measure.

An objective is the object or aim of an action or actions. The stated objective often includes specific behaviors or actions in support of the goal, along with a timeline for accomplishment. The previous example of a goal can be restated as an objective as follows: "By October 5, I will call on 10 new prescribers at targeted offices to establish rapport, create mutual name recognition and make the most of information-gathering opportunities." A manager could monitor and measure how well a representative is achieving this objective by requesting the names of new prescribers who have been called upon, as well as some information on each. Therefore, objectives are more useful

than goals in obtaining results.

Although it is important for the employee to have input in the choice of his or her objectives, the manager should prioritize or "weigh" the objectives, listing them in order of importance to departmental and organizational goals, and specifying the percentage of time that should be spent on each. Setting milestones helps ensure that the objective is completed in the previously established time frame.

Objectives that will be most effective in helping improve the employee's performance will pass the SMART test. That is, each objective should be:

- **Specific:** states exactly what result is expected.
- **Measurable:** quantifies the goal.
- **Attainable:** can be accomplished in a reasonable time frame.
- **Relevant:** is a good use of the employee's time.
- **Time-bound:** determines when the outcome must be achieved.

Appraising performance

Performance appraisals give managers the opportunity to provide feedback that their workers strongly crave, and allow management the chance to learn more about employees' points of view. Evaluation of employee performance for productivity improvement

RECEIVE CREDIT AND RECOGNITION

Continuing Education in Pharmaceutical Representative aims to provide reps with information to help them meet the needs of the people they serve and to contribute to reps' personal and professional development. Every third issue includes a self-assessment quiz covering the previous three Continuing Education articles. The quiz for this article appears in this issue. Reps who correctly complete the quiz and return it to the CMR Institute with a nominal handling fee will receive a completion recognition form showing that they have successfully completed the three-part educational series and earned .25 CEU (2.5 contact hours). The CMR Institute also will send a letter of recognition to reps' managers upon completion of a quarterly series. A Certificate of Achievement will be awarded to any representative who successfully completes four quizzes or has obtained 1.0 CEU.

Note: The Continuing Education quizzes are not part of CMR Institute's certification program and do not count as credits toward the CMR® designation.

About the CMR Institute:

The Certified Medical Representatives Institute is an independent non-profit educational organization established in 1966 to provide a source of professional development and certification for pharmaceutical representatives. The Institute provides an up-to-date, approved continuing education curriculum designed to expand and enhance internal company training and development in a cost-effective manner. The curriculum concentrates on providing a general knowledge base and avoids such areas as selling skills and specific product education.

© 2004 The Certified Medical Representatives Institute Inc., Roanoke, VA 24014. All rights reserved. No part of this article may be reproduced by any method or in any form without written permission from the CMR Institute. Reprints of this article are available from the CMR Institute. Request Continuing Education article MP-3.

should not only be done through formal periodic reviews, but also on an informal, ongoing basis. By conducting informal in-process evaluations, a manager can catch any performance problems early, before they have a chance to grow. If the employee's performance meets or exceeds expectations, the manager can reinforce the behavior by providing positive feedback.

The manager should schedule the formal performance appraisal meeting with the employee at such a time and place as to avoid interruptions. During the meeting, it is important to:

- Be specific; research suggests that specific information positively influences future performance effectiveness.
- Be nonjudgmental; describing the behavior and not the person informs the employee about what behavior to stop or continue in order to improve performance.
- Provide feedback at a time when the employee is not disturbed or distracted; changing a behavior or recognizing effective behaviors requires the employee's full attention.

Collecting evidence throughout the review period will make it easier for the manager to show the employee – if necessary – a negative pattern of behavior. The types of information that the manager can gather include:

- Objective data – quantifiable information, such as call reports, listings, dollar volume of sales, number of calls per day or quarterly reports.
- Significant incidents – positive and negative events related to the employee's objectives or performance factors (such as an incident in which an employee demonstrated good problem-solving skills and technical knowledge).
- Observations – anything that the manager has noticed that is relevant to performance.

Developing teams

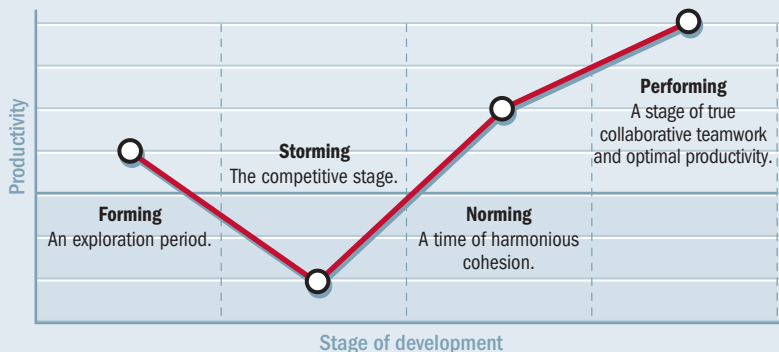
Successful managers understand the stages of team development and apply appropriate strategies at each stage to increase the overall effectiveness of their teams. There are predictable steps or stages that all teams go through before they reach peak productivity and efficiency. The Tuckman model is often used to understand the stages of team development. Tuckman's four stages are:

- Forming – an exploration period.
- Storming – the competitive stage.
- Norming – a time of harmonious cohesion.
- Performing – a stage of true collaborative teamwork and optimal productivity.

To move from forming to storming, effective managers get to know each team member, are directive, build a shared purpose and mission for the team, and continuously develop personal roles within the team. To move from storming to norming, effective managers communicate team goals and missions; move the team toward achieving a few goals; acknowledge

Figure 1

Productivity curve for teams in the Tuckman model*



*Adapted from Dufrene, 2002

struggles and encourage each member to express differing opinions, ideas and feelings; manage conflict; and establish norms. To move from norming to performing, effective managers share leadership with members, set goals that are specific and measurable, encourage members to take risks, celebrate and share individual and team successes, seek feedback from external groups, and evaluate the team against performance goals.

When the team is in the forming stage and needs leader direction, the manager assigns responsibility and drives the team process. As the team evolves and becomes more cohesive, leadership and assignment of project responsibilities are shared among the team members. Earlier in the process, members of strong teams may discuss as a group what role each member will play, may naturally gravitate to certain roles and may fulfill multiple roles that rotate as the need arises.

Decision making and problem solving that are done by team consensus – usually in the advanced stages of team development – lead to a higher quality of decisions and solutions, because when a variety of perspectives and opinions are taken into account, more creative and effective answers are generated. Also, when team members are involved in decision making and problem solving, they are more likely to accept the plan, feel ownership and accountability, and share responsibility for the attainment of the overall goal.

Communicating within teams

Skillful and ample communication is key to successful teamwork and outcomes. Methods of communication used within teams include:

Memos. In most offices, traditional memos have been replaced by less formal e-mail. However, memos are the method to use when the message you are sending to teammates is especially important. In general, memos should be short and to the point, although not so brusque as to be rude.

Progress reports. These documents report on the status of a long-term project, usually at fixed intervals such as weekly, monthly or yearly. Typically, progress reports:

- Tell what has been completed since the last progress report.
- Document how closely the team is adhering to the schedule and budget.
- Describe any encountered problems and attempted or potential solutions.
- Outline future plans.

Newer methods that enable communication with geographically dispersed members or virtual teams include:

E-mail. E-mail is a message transmitted over a computer network most often connected by cable, telephone lines or satellites. It is used by both virtual teams and teams that are in the same location.

Teleconferences and videoconferences. The teleconference, or conference call, is a meeting of three or more people, some of whom are in

different locations, who communicate via telephone. A videoconference is an interactive meeting in which participants in distant locations can see one another.

Computerized discussion groups and online meetings. Computerized discussion groups provide a forum for members to converse by adding their own contributions to the remarks of teammates. Members receive a continuously updated transcript of the dialog, allowing them to respond to anybody on the team at any time. Online meetings allow team members to use the Internet to create their own private chat room, where they exchange written messages in “real time.”

Groupware. Groupware is a form of software that automates information sharing between two or more remote users. One form of groupware – a group authoring system – allows different members to comment on each other’s writing with ease. This type of program keeps track of the edits made, who made them and when. Today, most word processing software programs have the same capabilities as groupware for editing team writing projects.

Conducting team meetings

To use meetings as an effective tool for managing teams, managers need to know not only how to run them, but also when to call them and how to follow up afterward.

Three basic steps to follow when planning a meeting are:

Identifying the meeting’s purpose. People hold meetings for three basic reasons: to share information, to solve a problem or make a decision, and as a social function. Weekly (or regularly scheduled) team meetings can be an important tool for informing members about new developments, progress each member has made on the project, and the coming weeks’ assignments.

Determining whether a meeting is necessary. Holding a team meeting is probably not justified if, for example, the matter could be handled just as well over the phone or via a memo, e-mail or fax.

Preparing an agenda. A complete agenda contains several kinds of information, including:

- A list of topics and attendees.
- The meeting’s starting and ending times.
- The meeting’s location.
- Necessary background information.
- A brief explanation of each item.
- Goals for discussion of each item.

During the meeting, effective communication skills should be employed so that the time is used efficiently, the tone is constructive and high-quality ideas are offered. An effective manager ensures that all important business is covered in a way that utilizes all the present members’ talents and keeps the meeting focused. The meeting should be concluded in such a way that members feel good about the team and clearly understand how to follow up on any

Article Summary

- An effective manager sets department goals based on the overall mission of the company, and then works with each employee to develop individual goals or objectives.

Effective objectives will pass the SMART test.

- Evaluation of employee performance for productivity improvement should not only be done through formal periodic reviews, but also on an informal, ongoing basis.

During the performance appraisal, it is important to be specific and nonjudgmental, and to provide feedback at a time when the employee is not disturbed or distracted.

Collecting evidence throughout the review period will make it easier for the manager to show the employee a negative pattern of behavior.

- The Tuckman model is often used to understand the stages of team development.
- Standard methods of communication used within teams include: memos, progress reports, e-mail, teleconferences, videoconferences, computerized discussion groups, online meetings and groupware.
- To use meetings as an effective tool for managing teams, managers need to know not only how to run them, but also when to call them and how to follow up afterward.

Basic steps to follow when planning a meeting include identifying the meeting’s purpose, determining whether a meeting is necessary and preparing an agenda.

During the meeting, communication skills should be employed so that the time is used efficiently, the tone is constructive and high-quality ideas are offered.

The meeting should be concluded in such a way that members feel good about the team and clearly understand how to follow up on any responsibilities or assignments.

- Conflict is part of life and should be expected as teams develop.

The manager can help resolve or manage conflict through education, communication, problem solving and involvement.

responsibilities or assignments. The manager should not assume that even a satisfying meeting was a success until he or she has followed up to make sure the desired outcomes were actually achieved.

Managing conflict

Conflict is part of life and should be expected as teams develop. Effectively working through conflicts can result in stronger work relationships and encourage the development of creative solutions. Avoiding or ignoring conflict can result in damaged relationships and inhibit the expression of potentially valuable opinions.

The manager can use several strategies to help resolve or manage conflict:

- Education – ensure that all members understand the facts involved and that both the manager and the other team players understand each other’s position.
- Communication – enthusiastic repetition of the team’s overall goal will help members commit to the team and the decision to find solutions consistent with the goal.
- Problem solving – examine each person’s goals and search for alternatives that will satisfy the largest number of mutually held goals; have members participate in the problem-solving process by brainstorming or role-playing as a group.
- Involvement – involving members in problem solving and decision making will help build cohesiveness and lessen the chance that members will rebel against or challenge the team leader.

The next series will focus on the value of pharmaceuticals.