

Instructions

How to complete the Performance Analysis Worksheets

THERE ARE 10 INDIVIDUAL WORKSHEETS that describe many components of Administrative Management Jobs. Your job may, or may not, include all these components. If you find a section that does not apply to the work you do, omit it.

Each Performance Analysis Worksheet describes specific areas of your job in six different ways:

These worksheets are designed for you and your manager to use together. To get quality results, schedule a minimum of three uninterrupted hours to complete the process.

- primary services and activities you provide
- individual tasks you perform
- customers you service
- contributions you make toward organizational goals
- expertise you apply
- continuing education recommendations

Space is also allocated for documenting performance development strategies.

You will analyze the amount of time you currently spend in each area of your job, your current performance level, and your future objectives. There are also 10 questions at the bottom of each Worksheet that will help you set measurable objectives. A good suggestion, which came from one of the case study managers, is to define new objectives in just one or two areas per review period. This is hard work!

Step-by-Step The numbers ❶ ❷ ❸ ❹ ❺ ❻ ❼ ❽ are marked on each job analysis worksheet to help guide you through the process.

STEP ONE—Get prepared

- 1.1. Read the entire workbook before sharing it with your manager. It is essential you present the information to your manager with confidence and are familiar with the concepts and terminology.
- 1.2. Refer to the project's website www.officeprofessionals.org for additional background information.
- 1.3. **Schedule 3 hours of uninterrupted time to meet with your manager.** Make sure you each have copies of the workbook and you *both* clearly understand what you want to achieve by going through this exercise.

STEP TWO—Schedule time for yourself

- 2.1. Schedule 2 hours of uninterrupted time for yourself, **before** meeting with your manager.
- 2.2. You will complete your part of the workbook first.
- 2.3. It helps to have a colleague available to assist with feedback, articulation, and interpretation.

STEP THREE—Begin Completing the Job Analysis Worksheets (Managers begin here)

- 3.1. Locate the first Job Analysis Worksheet, **Administrative Services Manager**.
- 3.2. Look for the ❶, ❷, and ❸ in the top right corners of the first three boxes in the chart. These are occupational descriptors that describe one component of administrative management jobs.
- 3.3. Review the services provided, activities, skills, abilities, and continuing education recommendations.

STEP FOUR—Analyze the tasks you perform

- 4.1 Locate the two columns with ❶ at the top in the Tasks Performed area.
- 4.2 Review all the tasks listed.
- 4.3 Mark the ones you perform, **from your perspective**, under the column heading **You**.
 - 4.31 **Managers** will mark answers, from their perspective, under the column named **Mgr**.

STEP FIVE— Finish analyzing tasks on all the Worksheets

- 5.1 **Repeat steps Three and Four with the other nine Job Analysis Worksheets.** Remember that if you find a Worksheet that does not relate to the work you do, omit it.

STEP SIX— Calculate time you spend doing these tasks

- 6.1 Find the **Time Spent Worksheet** located after the 10 Job Analysis Worksheets. These descriptor titles are identical to those found on the Job Analysis Worksheets.
- 6.2 Estimate the percentage of time you currently spend in each area of your job.
- 6.3 Enter your answers in the first column under **Current Time Spent/You**. It's easiest to use percentages that are divisible by 5. If an area listed does not pertain to your job, enter 0.
 - 6.31 **Managers** will mark answers, from their perspective, under the column heading **Current Time Spent/Mgr**.

STEP SEVEN— Study your answers and set objectives

- 7.1 Briefly study your answers.
- 7.2 Think about all the components of your job. What is most important for you, which parts do you like best, what do you like least about the work you do, and which areas do you want to learn more about?
- 7.3 Based on these thoughts, think about how **you** would like to structure your job.
- 7.4 Estimate the percentage of time you would like to spend in each area of your job over the next 12 months
- 7.5 Enter your answers in the third column under **12-Month Objective/ You**. It's easiest to use percentages that are divisible by 5. If you want to eliminate an area, enter 0.
 - 7.51 **Be honest with yourself when completing Step Seven!**
 - 7.52 Areas of reflection for managers: what components of your assistant's job are most critical to you and your organization; how can you help target her strengths; how can you assist in areas that are challenging her; and how can you help with her professional development? **Managers** will mark answers, from their perspective, under the column heading **12-Month Objective/Mgr**.

STEP EIGHT— Transfer your Time Spent answers to the Job Analysis Worksheets

- 8.1 Locate the Time Spent Boxes (0 -100%) in column ❶ on the Job Analysis Worksheets.
- 8.2 Transfer your final answers from the Time Spent Worksheets into each corresponding box with the **You** heading in column ❶
 - 8.21 **Managers** will transfer their answers under the column named **Mgr**.

STEP NINE— Analyze your performance

- 9.1 Locate the Performance Rating boxes on the worksheets.
- 9.2 Determine, from your perspective, how well you're doing in each area of your job and record your answers. The performance codes range from 1-5. 1 denotes unsatisfactory performance and 5 denotes exemplary performance.
- 9.3 Determine, from your perspective, how well you'd like to be performing in 12 months in each area of your job. Record your answers.
 - 9.31 **Managers** will analyze and record their assistant's performance separately.

STEP TEN— Now it's your manager's turn!

- 10.1 Meet with your manager and make sure she understands the process
- 10.2 Have her complete **Steps Three — Ten**. She will probably take between 30 and 45 minutes to complete these steps.

- 10.3 While your manager is completing the analysis, review your own answers.

STEP ELEVEN— Meet with your manager to discuss the results. This will take between one—two hours.

- 11.1 **Compare perspectives** in the two columns labeled ④.
- 11.2 Record each other's answers, as a reference, in the appropriate columns in your own workbook. Keep an open mind and be prepared to discuss and substantiate your answers. Expect disparities.
- 11.3 As you discuss each cluster of tasks, review columns ⑤ and ⑥ to establish what customers are being serviced and what the contributions toward organizational goals are. These answers should help you determine the final negotiated answers in column ⑦.
- 11.31 Managers participating in the case studies concluded that most of the Subject Matter Expert's (SMEs) answers were correct. They also gave the SMEs substantial recognition for performing work in many important areas that the SMEs had not acknowledged on their own.
- 11.4 Negotiate your final answers and record them in columns ⑧, ⑨ and ⑩.

STEP TWELVE— Calculate competitive wages

- 12.1 Download the **Excel Wage Worksheet** onto your desktop. Refer to www.officeprofessionals.org for additional instructions.
- 12.2 Locate the % of Time Spent column on the Excel spreadsheet. The rows under the Occupational Title column match your Job Analysis Worksheets.
- 12.3 Enter the **% of Time Spent** data from your Job Analysis Worksheets into the appropriate row.
- 12.4 The spreadsheet will do an automatic calculation for you.
- 12.5 The **weighted wages** row will show you what you should be earning for the work you're doing.
- 12.6 The **base salary wage differential** row will tell you how those wages compare to average wages for Executive Secretaries and Administrative Assistants.
- 12.7 Compare these numbers with your actual base salary. Keep in mind that the salary statistics used for this wage worksheet are from a 1996-1998 labor survey. The figures are quite conservative for Silicon Valley.

STEP THIRTEEN— Develop a plan for improving performance

- 13.1 Review your Job Analysis Worksheets.
- 13.2 Select one or two areas of your job to include as part of your performance development plan.
- 13.3 On the corresponding Job Analysis Worksheets, locate ⑪ — **Performance Development Strategy**. Answer all the questions.
- 13.4 Reference other charts in the workbook if you need additional planning resources.

STEP FOURTEEN— Start tracking your performance

- 14.1 Transfer your performance development strategies to the **Performance Diary**, or other tracking tool, which will help you document your progress.
- 14.2 Keep track of your performance and make sure you have a firm date scheduled for your next performance development meeting.

Congratulations!

You have just completed a very challenging process.