

Documentation

Document, document, document! It's all HR seems to think about. And it seems annoying to spend the time to document. But, good, sound documentation can save you and your company a lot of time, a lot of headaches, and a whole lot of money.

Get the Point Across

What to document?

Document performance reviews, recognition and feedback, notes taken during meetings and disciplinary documentation.

When to document?

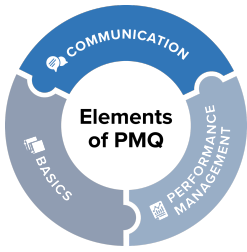
Document everything as soon as possible before you forget the specifics.

Where to document?

Documents may be stored in a talent management system or on paper. Make sure that paper copies are in locked drawers and electronic copies are in password-protected folders. Documents will be stored and disposed of in alignment with organizational policy. Depending on location and industry, this may vary.

HR Guidance

Review your organization's policies on employee records, business records, training materials, HRISs and customer information. Look for information about access, storage and retention period. Contact your HR or IT partner with questions.



Key Tips for Informal Observations

Provide Specific Examples

Stay away from using phrases describing someone as “too emotional.” Believe it or not, that little utterance could be considered gender bias (as a female stereotype). Instead, detail exactly what happened: “you were heard yelling in the hallway at another employee.” Then talk about why that matters to the business, “any type of yelling or disturbance in the hallway is disruptive to the work of the team, and is especially disruptive to the relationship between you and the other employee, making it difficult for you to work together.”

Don't Make it Personal

Focus on results, not the person. Keep your conversation focused on your team and organizational goals and results. If you're talking about relationships between two people, talk about it in terms of how it relates to the business and how it detracts from your team reaching its goal.

Never Say Never or Always

These absolutes are, well, never absolute. When you use words like never or always, it sounds like you are exaggerating for effect. All it takes is one tiny little example to the contrary to prove you wrong. It's best to steer clear of these two word bombs.

Ask and Listen

In the earlier yelling example, you can follow up with a question like, “Would you agree?” or “What do you think?” then be quiet for a full eight seconds. (Here's a trick: usually people will get uncomfortable with eight seconds of silence and say something.) If the employee says nothing, note that, and move on.

Clarify Expectations

Be specific and clear about what you expect going forward.