

Workflow: Operational Guidance and Execution

Toolkit 3.4

Daily Performance Review

target audience

Managers, supervisors, and team leaders.

what it is

A daily performance review is a short, routine, team session during which the manager, supervisor, or team leader examines the packhouse/department/section's performance over the last 24 hours, reflecting on:

- What are we doing well?
- What are we not doing well, can we reset the standard quickly, and do we need to do more to correct, train etc.?
- What is going to plan?
- What is not going to plan, and how are we reacting to this?
- What are the root causes of poor performance, and how do we address them?
- What are the targets and priorities for the day/shift ahead?

These daily meetings are characterised by:

- Regularity – at the same time, in the same place and where teams naturally meet up.
- Brevity – short (15-20 minutes maximum), and often people remain standing.
- Focused – structured, energetic, and focused on operational performance.

why it is important

If done well, the daily performance review:

- Enables managers/team leaders to learn, elicit input from their team, and communicate with them.
- Continuously reinforces standards and best practice.
- Embeds a culture of “we measure and we mentor”.

The daily performance review should answer the following questions:

- What does our day look like?
 - The operational impact/consequences of the past 24 hours.

- Significant threats that require action.
- Daily operational plan, schedule, and accountability.
- Are we improving?
 - Short-term issues, and
 - Long-term issues.
- Are we achieving our targets?
 - Performance review of key performance indicators.

Each employee should be clear on the status of the operation, what the priorities are, and his/her part in making that day/shift successful.

success factors

- **Assign a meeting facilitator** – Usually the packhouse or operations manager.
- **Clearly define “significant threats”** – In order to avoid disempowering the shift-based teams, it is vital to specify which operational threats should be escalated to the daily performance review for discussion vs. being handled by the shift teams.
- **Strive for efficiency** – A well-run daily performance review should take no more than 15-20 minutes.
 - Make it a stand-up meeting.
 - Establish a “90 second rule” – no discussion exceeds 90 seconds. If it does it is taken up by accountable people outside of this meeting.
 - Agree to a concise agenda, such as:
 1. Safety – 2 minutes.
 2. Review performance for past 24 hours – 3 minutes.
 3. Review all significant threats and allocate specific threats for more in- depth analysis – 5 minutes.
 4. Confirm the plan for next 24 hours – 3 minutes.
 5. Follow up on previous actions – 2 minutes.
- **Carefully consider attendees** – It is important to decide who should attend the daily performance review.
 - Will the participant be expected to provide information that the participants need to coordinate and prioritize their work?
 - Will the participant receive important information in the daily performance review that he/she cannot efficiently obtain another way?

If the answer to one or both of the above questions is “yes,” then the employee in question should attend the daily performance review. If the answer to both of the above questions is “no,” then the employee should not be required to attend.

- **Make use of visual management** – The daily performance review can benefit through the use of simple visual boards and other displays to succinctly convey information so that time does not need to be spent in the meeting to verbally cover certain items.

execution steps

1. Decide on the timing, location, format, agenda, and attendee list for the daily performance review.
2. A few weeks after the daily performance reviews have commenced, evaluate one of them against the criteria for effective daily performance reviews (Refer to the [Criteria for Effective Daily Performance Reviews](#) for more information), and align on improvement opportunities with the participants.

assessment questions

Please Note: There is no minimum / maximum number of questions you can add.

1.	Do you have a set location where your daily performance review takes place?
2.	Does your daily performance review take place daily, at the same time?
3.	Is the attendance well considered and appropriately inclusive?
4.	Do you have a structured agenda?
5.	Are only appropriately significant threats discussed at this meeting, and not issues that should be addressed by individual teams?
6.	Do you keep your meetings to a maximum of 20 minutes?
7.	Is the meeting facilitated by the same person for continuity and follow-through?
8.	Does the facilitator keep an up-to-date note/record book?
9.	Do the attendees each keep a notebook?
10.	Are visual score boards used and updated?

resources

1. [DOR Agenda Example](#)