



# The Power of Our Voices



# Emplicity Workshop

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## Performance Appraisals

# Welcome

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## Leadership Team



# Training Agenda

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- Introduction
- Ground Rules For Today
- Training Objective
- Presentation
- Review The Form
- Questions

# Ground Rules

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- ✓ Participate!
- ✓ No Cell Phones
- ✓ Learn
- ✓ Keep An Open Mind
- ✓ Relate To Your Work Environment
- ✓ Take Notes
- ✓ Ask Appropriate Questions

# Training Objective

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**To provide you with the training and tools you will need to successfully complete performance appraisals for your employees.**

# Why....

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.....Do We Need A  
Performance  
Review Process????



# Why Do We Need A Performance Review Process

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- To provide feedback to employees regarding their specific skill level, work quality and productivity.
- To encourage constructive communications between employees and managers regarding job performance.
- To identify areas where an employee is successful, and areas that need improvement and to identify the performance gap (if any).



# Why Do We Need A Performance Review Process

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- To enhance employee morale by fostering employee participation in goal setting and future development.
- To assist the company in identifying individuals with promotion potential and establish opportunities for future career development.

# The Process

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- Annual performance reviews are just that- a review of previous performance.
- Receiving an annual performance review does not mean “salary review” or an increase.
- Managers will write a review for each employee during the month designed by the Company.
- Managers will deliver an appraisal to each employee the following – reflecting the prior year.

# Consistency Is Crucial

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- To be effective the “appraisal process” must be used properly and consistently.
- Managers must take an active role in the process; Managers need to commit to conducting timely and accurate appraisals.

# **The Goal Of The Appraisal**

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**Is to have a positive  
impact on future  
performance!!!**

# Writing The Performance Appraisal

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- Schedule un-interrupted time to focus on just writing the review.
- It usually only happens once or twice a year.... so make it count.
- Start by making a list of major job responsibilities.
- Then review the employee's successes & challenges.
- Write it over a couple of days.

# Writing The Performance Appraisal

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- Review your work to make sure that you are not taking out the stress of your day in the review.
- Pull from your notes to site specific examples (performance log).
- Employees in the same job category should be measured similarly.



# What To Put In...And What To Leave Out

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- Focus on performance objectives.
- Site specific examples from customers or co-workers that show that the employee went above and beyond.
- Use language that will motivate the employee to change the behavior for the better.
- Create action items.
- Stay away from addressing small issues that have only happened once.
- Stay away from non performance issues (i.e. absenteeism due to LOA's)
- Stay away from attacking the person, focus on the behavior.

# Common Mistakes

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- To perceive the appraisal as an isolated event rather than an ongoing process.
- Rating personality instead of work performance.
- Using statements that are too general.
- Not investing enough time to make them a valuable tool.
- Only reviewing the last few months instead of the entire year.
- Inflating the scores.



# Remember The Goal....

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**To have a positive impact on future performance!**

- The performance review is a “business report” about an employee’s job performance.
- It helps you make decisions about pay and other important employment matters.
- It communicates how you expect the employee to perform in the future.
- Employees are likely to feel more satisfied with their appraisal result if they have the chance to talk freely and discuss their performance.

# Pre- Meeting Preparation

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- Give the employee the “Employee Self-Performance Evaluation Form” to complete & return.
- Allow yourself time to review the employee’s comments from their self-performance evaluation that you read prior to writing the Performance Appraisal.



# Set The Employee Meeting

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- The review should be conveyed during a face-to face meeting between the manager and employee.



- Choose a time & place when you will have quiet uninterrupted time.
- Give the employee advanced notice.
- Allow them to give input on the time and place.

# The Employee Meeting

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- Briefly review & explain the process.
- Be calm & be prepared.
- Thank the employee for completing their self appraisal on time.
- Review the Performance Appraisal form you completed with the employee.
- Address any performance gaps.
- Summarize future goals.
- Wrap-up, thank the employee.
- Have the employee sign the form, give a copy to the employee and the original to HR for the personnel file.

# Delivering Bad News

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- Addressing performance issues can be the most difficult part of being a manager.
- It requires planning and patience.
- It is usually better to do sooner than later with as little emotion as possible.
  - Prepare yourself
  - Don't joke around or beat around the bush
  - Give employee's the opportunity to speak
  - Make an effort to be encouraging and empathetic
  - Set deadlines for change

# How To Document Behavior That Needs IMPROVEMENT:

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- What is the performance standard?
- How is it not being met?
- What needs to be done to correct the performance issue?
- What suggestions do you have to help the employee succeed?
- What are the consequences for not improving performance?

# Use Specific Examples

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- Use the comments sections of the review template to illustrate the score/rating given with specific examples.
- Carefully select examples that concentrate on performance, not personality.
- Specific examples may help the employee understand the reasoning behind the rating given.

# Constructive Feedback

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- Telling an employee that something is wrong with his/her performance is one of the most difficult things you will ever do.
- If it is done **correctly**, the employee will learn and grow from the experience.
- If it is done **incorrectly**, the employee will be de-motivated, hurt or even angry.



# Constructive Feedback Should Be:

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- Done as soon as possible.
- Kept confidential.
- A two way conversation; ask the employee to explain the situation.
- Allow the employee to fix the problem.
- A teamwork approach to help avoid future problems.
- Objective - NOT personal.

# Delivering The Good News

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- Failing to recognize employees for doing what they are supposed to do is one of the most costly management mistakes we can make.
- When employees do things correctly and don't hear from management, they slowly begin to feel unappreciated and taken for granted.
- Over the long term, productivity drops and turnover increases.

# How To Document Behavior That You Want To CONTINUE:

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- What is the performance standard?
- Specifically, what is the employee doing correctly?
- Why is it the right way to do it?
- Express appreciation for a job well done.

# Unscheduled "on the job" Feedback

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- There should be constant communication regarding an employee's performance.
- The formal review is not meant to take the place of valuable informal communications.
- Managers should make sure that there is a constant flow of communication conveying praise or constructive feedback.

# The Form

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## Let's Review The Performance Appraisal Form



# The Appraisal Form

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Let's review this together

# Performance Rating-

## Page #1

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- Assign a score to each section:
  - I. Alignment with Organization Mission
  - II. Position/Job Knowledge
  - III. Initiative and Leadership
  - IV. Work Relationships
  - V. Communication Skills
  - VI. Dependability/Reliability
  - VII. Quality and Timeliness of Work
  - VIII. Innovation and Flexibility
- Similar positions should be measured the same.
- Provide examples of performance for anything that rates a “1” or a “3.”

# Overall Rating and Evaluator's Comments

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- Write in answers to the Goals and Objectives sections.
- This is your chance to address the employee in your own words regarding their accomplishments, strengths and recommended actions.
- List specific position goals and staff development opportunities.



# Manager and Employee Statements

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- Both the manager and employee will have an opportunity to write in a statement regarding the appraisal meeting.
- The entire form should be given to the employee to complete before the meeting: self-review.
- Managers should read it over before the meeting.

# KEY POINTS To Remember!

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- Remember the goal.....
- Be prepared.
- Be accurate.
- Be on time.
- Be consistent.
- Use specific examples.
- Use constructive feedback.

# Questions

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# Thank You For Your Participation Today!

