

# Performance reviews and appraisals

## Overview

Performance reviews and appraisals are an essential tool in managing staff and team performance effectively. This one-day workshop has been designed to help managers implement their organisation's performance appraisal system effectively. It focuses on how to prepare for appraisal meetings, how to get the most out of the meeting itself, and how to ensure that the appraisal informs and supports performance management on a day-to-day basis. Particular attention is paid to setting SMART objectives.

## Learning objectives

This is a skills- and confidence-building programme which will help participants to:

- Understand the benefits of performance appraisals and how they support the management of performance on a day-to-day basis
- Prepare and conduct positive and meaningful performance appraisals and review meetings – including the setting of SMART objectives
- Monitor and measure performance objectively and consistently against defined objectives / targets
- Implement the organisation's performance appraisal system in a positive and proactive way, with a full understanding as to how their role as a manager fits into the bigger picture

## Audience

All those with line management responsibilities who have to carry out performance appraisals.

## Format

This one-day course is highly participative and uses individual and group exercises to illustrate problems and develop a best practice approach in dealing with them. Group discussions and feedback are used to develop learning points and to enable participants to relate examples to their own situations. The programme is generally tailored around the client organisation's performance appraisal system.

Participants will be sent a welcome pack in advance of the session which will include some pre-course work as well as asking them to reflect upon their own experiences and challenges in this area. Participants will also be asked to familiarise themselves with the organisation's performance appraisal system relating to this area and to bring copies of any relevant documents to the course for reference throughout.

## Special feature

This programme can be run in a variety of formats, with variations on the theme including a half-day programme just on objective-setting, a half-day programme focused on the one-to-one, and full or half-day versions of either programme for staff (as opposed to their line managers).

## Expert trainer

This programme is delivered by **Rachel Hicks**, our lead trainer in this area. See her profile [here](#).

## Workshop outline

### 1 Introduction

- Programme objectives and benefits from attending
- Participants' experience and confidence in this area
- Personal objectives

### 2 Effective appraisals

- Participants' experiences of conducting / receiving appraisals
- What makes them successful or unsuccessful?
- Purpose and benefits of appraisals
- Appraisals and performance management

### 3 The process

- Your performance appraisal system
- The performance management cycle
- Documenting the appraisal
- Roles and responsibilities

### 4 Preparing for a performance appraisal

- Preparing to hold a performance appraisal
- Assessing performance and gathering evidence
- Determining future objectives
- Identifying development needs

### 5 The performance appraisal meeting

- Structuring the meeting
- Encouraging participation

### 6 Setting objectives

- Goals, objectives and outcomes – what are they and why do we use them?
- Start with the end in mind – what needs to be achieved and / or delivered and how will you know?
- Making objectives SMART
- *Exercise – are these objectives SMART?*
- Practical tips – diagnostic questions to help set objectives, verbs to use, verbs to avoid, etc
- Making SMART objectives even SMARTER

### 7 On-going review

- Monitoring, measuring and reviewing performance
- Providing support and effective feedback
- Developing your staff to improve performance

### 8 And finally...

- Open forum – remaining challenges and 'what if' scenarios
- Action planning – identifying how participants will transfer this learning into the workplace and what else they may need which will help them to do this effectively
- Review and close

For a no-obligation discussion about running this programme for your organisation on an in-house basis, just give us a call on **01582 463462**.