

The dreaded appraisal

Both sides of the appraisal interview



video artsTM

A Video Arts production featuring
Bryan Murray, Dawn French, Robert Lindsay,
Hilary Crowson and Tilly Vosburgh.



The dreaded appraisal

Both sides of the appraisal interview

Published in 2000 by Video Arts Group, trading as Video Arts Limited

Tel: 020 7400 4800 Fax: 020 7400 4900

email: info@videoarts.co.uk

Sales tel: 0845 601 2531

Visit our website at: www.videoarts.com

© Video Arts Limited 2000

Written by: Pat Mitchell, Mitchell Management Training

Designed by: Design Revolution, Brighton

WARNING

It is unlawful to copy this programme or any portion thereof unless specified otherwise or with the prior consent in writing of the copyright owner. This programme is supplied subject to the condition that it shall not, by way of trade or otherwise, be lent, re-sold, hired out or otherwise circulated without the prior consent in writing of the copyright owner.

Titles in this series:

Absence minded: managing absenteeism

An inside job: meeting internal customer needs

Building the perfect team: Belbin's team role theory in action

Can you spare a moment?: counselling skills for managers

Demanding customers: customer care made perfect

Does the team work?: improving effectiveness through teamwork

First among equals: leading a team

Going to a meeting, part 1: messing up a meeting

Going to a meeting, part 2: meeting menaces

How am I doing?: the performance review

How to lose customers without really trying: keeping the customer satisfied

I wasn't prepared for that: overcoming the fear of making presentations

I'd like a word with you: the discipline interview

If looks could kill: the power of behaviour

It's your choice: selection skills for managers

Meetings, bloody meetings: making meetings more productive

More bloody meetings: the people side of meetings

Negotiating - tying the knot: a skill for life

No complaints?: complaints and the customer

Not my type: valuing diversity

On the receiving end: making call centres more effective

Performance matters: the importance of praise

Performance matters: the need for constructive criticism

Project management: leading a project team

Report writing: the art of writing a good report

Selecting the perfect team: utilising internal and external resources

Sell it to me! parts 1 & 2: essential skills for a salesperson

Straight talking: the art of assertiveness

Talking to the team: how to run a team meeting

Team spirit?: how to be an effective team member

Telephone behaviour: the rules of effective communication

The balance sheet barrier: the basics of business finance

The best of motives, parts 1 & 2: informing and involving

The dreaded appraisal: both sides of the appraisal interview

The grapevine: communicating in a world of change

The helping hand: coaching skills for managers

The paper chase: cutting back on paperwork

The unorganised manager, parts 1 & 2: damnation and salvation

The unorganised manager, part 3: divine intervention

The ultimate change show: managing change

The ultimate stress show: managing stress

Who sold you this, then?: effective after-sales service

You'll soon get the hang of it: the techniques of one-to-one training

Contents

4-5 Video-based training from video arts

6-8 Introduction

9-11 What the pack contains

12-26 Course leader's guide

GTW-1-GTW-18 Group training workbook*

SSW-1-SSW-28 Self-study workbook*

OHP-1-OHP-9 Presentation 'slides'/OHPs*

Certificate*

*Copies of these resources are also available in electronic formats to allow you to customise them to your specific requirements and to print the required number of copies from the master for the sole purpose of the training envisaged by the programme, and not for any commercial purpose.

Video-based training from Video Arts



Congratulations on choosing **The dreaded appraisal** from Video Arts to help develop the skills in your organisation. Video Arts is recognised as the world leader in video based training, with over 30 years' experience in staff development. With more than 300 programmes on video/e-learning covering all the essential skills of business, you can remain confident that training with Video Arts is the most effective way to improve the skillset of the people within your organisation.



Praise and encouragement are vital for employee motivation.

Why train?

Train hard, fight easy - Marshal Zhukov

These days, it is difficult for organisations to become successful and stay that way. The pace of change is faster, competition is tougher, customers are more demanding, innovation is more prized, but harder to achieve.

Part of the response has been to create leaner, flatter, more flexible structures, but structures don't run organisations and create success, people do - intelligent people, energetic people, reliable people and, most of all, people with the right mix of up-to-date knowledge and skills.

That means people who are trained, not for a lifetime's work, not just once in a while, but as a central, continuing part of their working lives.

Why use video based training?

Video is familiar. Television is how most people find out what is going on in the world. It is not surprising that this is a medium they are comfortable to learn from when they are being trained.

Video makes demonstration easy. We can show situations being handled badly. We can contrast that with how to handle them well.

Video is flexible. It can be the cornerstone of a course run for a group by a specialist trainer. It can quickly provide simple, clear lessons for a team whenever it is convenient for them. It can bring interest and enlightenment to a self-study programme.

Video injects realism. It lets us present those being trained with emotional, as well as rational, problems to solve. Ask a group '*how would you deal with an angry customer?*' and you will get a tidy, textbook answer. Use video to confront them with an angry customer and you will get a much more realistic reaction.

Video provides variety. Different people learn in different ways and none of us has an infinite attention span. Video provides us with a powerful means of injecting variety into our training.

Why use Video Arts' programmes?

Winston Churchill once said that he loved to learn, but hated being taught.

That is the secret of successful training: how to help people who want to learn. We do it by combining:

A storehouse of professional knowledge and expertise, developed over 25 years and drawing on some of the best minds in the business.

The highest possible production values, both in the videos we produce and in the support material that goes with them.

The magic ingredient - humour - which can make a delight of the dullest subject.

Introduction

Appraisal, when it is done well, is a powerful tool for improving communication between managers and managed. It strengthens organisations by its focus on performance and improvement. It motivates individuals by acknowledging their strengths and achievements and giving them an opportunity to discuss how their jobs can be done better.

Done badly, on the other hand, appraisal is at best an irritating chore. At worst, it is a depressing and unpleasant experience for both appraiser and appraisee which can do serious damage to their working relationship. It is not surprising that many people dread it.

The dreaded appraisal is a video-based training programme to help appraisers get the most from appraisal by preparing and structuring the discussions properly and handling awkward situations (and people!) correctly.

Objectives

Those who work their way through **The dreaded appraisal** training programme will:

- Understand the purpose of appraisal
- Be able to prepare an effective appraisal discussion
- Be able to begin the discussion positively, structure it as it unfolds and end it by agreeing the actions which arise from it

- Know how to cope with awkward situations which appraisers sometimes encounter, in particular:
 - encouraging a shy appraisee to explain what is bothering her
 - criticising someone who can be very touchy
 - getting an abrasive character to focus on his own performance, rather than blaming shortcomings on the company
- Identify specific actions which they can take to improve their appraisal discussions

Using The dreaded appraisal

- **Dual use.** The programme can be used either as a conventional training course with a small group or for self-study by individuals. The pack contains guidance and appropriate materials for both uses
- **Resources on disk.** Most of the support materials, such as OHPs and the workbooks, are supplied in electronic formats. This makes it easy for users to customise to their specific requirements and allows them to print as many copies as they need for group or individual use

The target audience

The programme is designed principally for all managers whose responsibilities include appraising their staff. Since a good appraisal is always a two-way process, those who will be on the receiving end of appraisal will also benefit from it.

The course leader

The person leading a group through the programme does not have to be a professional trainer. Line managers will be able to deliver this course with confidence by using the materials and detailed guidance provided.

Further resources

Other titles available from Video Arts that will help you improve the internal customer care skills within your organisation include:

- **Performance matters: the importance of praise** Giving praise where it's due can bring amazing results in terms of increasing the quality and quantity of people's work, providing it's properly applied
- **Performance matters: the need for constructive criticism** Criticism is a legitimate means of preventing the recurrence of mistakes and improving staff performance. Help your managers understand why criticism is an important management tool and how they can use it effectively

- **The dreaded appraisal CD-ROM** This comprehensive CD-ROM course enables managers to get the skills of the appraisal right by completing interactive exercises and interviews
- **The appraisal interview: lessons for both parties in the appraisal** This programme from Melrose helps to ensure that both appraiser and appraisee take equal responsibility for getting the most out of their meeting
- **Constructive appraisals** This self-development workbook explains why appraisal is so vital and shows how to choose and implement an effective system
- **The appraisals pocketbook and Managing your appraisal pocketbook**
From the Management pocketbook series

What the pack contains

The dreaded appraisal video

The video is in three parts.

1. Introduction

This is a three-minute introduction to the topic of appraisal, presented by the scriptwriter of the programme, Sir Antony Jay. He outlines why appraisal is important and describes the challenges it offers to both appraiser and appraisee.

2. The dreaded appraisal

This is the main part of the video and lasts for approximately 25 minutes. It is divided into three sections, each of which demonstrates how to handle one of the following situations, first by showing it done badly, then by discussing what went wrong and finally by demonstrating how it should be done:

- an employee who has something very important she wants to say, but, because she is rather diffident, finds it hard to get across
- a touchy employee who has many real strengths, but needs to be helped to recognise her weaknesses and agree how she will work on these
- an antagonistic employee who is convinced that any shortcomings in his performance are the organisation's fault and not his

3. The appraisee preparation video

This four-minute video is aimed at those who are soon to be appraised. Using the three awkward characters from the main video, it encourages appraisees to prepare for the discussion by thinking about their work, how it has been going in the recent past, what current issues they want to raise and the direction they would like it to take in the future.

Course leader's guide

- An outline of a half-day programme
- How to prepare the programme
- A detailed session plan. This tells the course leader precisely what to do and which resources to use in each session of the programme

Group training workbook

This workbook allows those taking part in a group training course to record the conclusions they reach during the various sessions and the actions they propose to take as a result of the course. The workbook is supplied in an electronic format.

It also contains a copy of the course objectives and programme and a set of notes which summarise the main points of **The dreaded appraisal**.

Self-study workbook

This workbook, which is supplied in an electronic format, contains detailed instructions which enable individuals to work systematically through the programme. Users will find that they are prompted to record their answers to questions about what they have seen and to produce an Action plan.

The workbook also contains a set of notes which summarise the main points from **The dreaded appraisal**.

Links to NVQs

Both workbooks contain a checklist of material which those who have taken part in the programme should collect, such as examples of communications briefs on specific projects, to form a portfolio of evidence which they can use to support a claim for competence in elements of NVQs.

Presentation 'slides'/OHPs

These are master copies supplied in Microsoft® PowerPoint® on computer disk for printing on to acetate or for use as a computer-driven 'slide' show.

Certificate

One of the disks also contain a blank certificate which users can customise and issue to those who have completed the course based on **The dreaded appraisal.**

Computer disks

As explained above, the computer disks contain copies of:

- Group training workbook (Microsoft® Word®)
- Self-study workbook (Microsoft® Word®)
- Presentation 'slides'/OHPs (Microsoft® PowerPoint®)
- Certificate (Microsoft Word)

(Microsoft®, Word® and PowerPoint® are trademarks of Microsoft Corporation.)

Course leader's guide

Course programme

How to prepare the programme

Session 1 Introduction

Session 2 The purpose of appraisal

Session 3 The appraiser's preparation

Session 4 Getting people to open up

Session 5 Facing up to the problem

Session 6 Agreeing a plan for the future

Session 7 The appraisee's preparation

Session 8 Action plan



Course programme

This is a suggested programme for a half-day appraisal course.

You may choose to incorporate additional sessions to cover key points specific to your organisation or just take elements of the course and run a series of short sessions covering each aspect of **The dreaded appraisal** individually.

If you would like help in facilitating this course or in adapting it to your specific requirements, call Video Arts Training Services. An experienced training consultant can advise you or, for an agreed fee, design and run a course for you.

Video Arts Training Services can be contacted on:

Video Arts limited

Tel: 0207400 4800

email: info@videoarts.co.uk

The programme overleaf is an outline of the course.

Each session is covered in detail later in the Course leader's guide.



Appraisal should be about agreement not aggression.

Session no.	Session content	Approx. timing
Session 1	Introduction and objectives <ul style="list-style-type: none"> • Welcome and housekeeping • Objectives • Structure of the course 	<i>10 mins</i>
Session 2	The purpose of appraisal <ul style="list-style-type: none"> • Video: introduction • Discussion • Definition 	<i>15 mins</i>
Session 3	The appraiser's preparation <ul style="list-style-type: none"> • Small group discussion • Discussion summary 	<i>25 mins</i>
Session 4	Getting people to open up <ul style="list-style-type: none"> • Video excerpt • Discussion • Video excerpt • Summary • Exercise 	<i>40 mins</i>
Break		<i>15 mins</i>
Session 5	Facing up to the problem <ul style="list-style-type: none"> • Video excerpt • Discussion • Video excerpt • Summary • Exercise • Discussion 	<i>45 mins</i>
Session 6	Agreeing a plan for the future <ul style="list-style-type: none"> • Video excerpt • Discussion • Summary • Exercise • Video summary 	<i>45 mins</i>
Session 7	The appraisee's preparation <ul style="list-style-type: none"> • Video excerpt • Discussion 	<i>15 mins</i>
Session 8	Action plan <ul style="list-style-type: none"> • Action plans • Course summary 	<i>15 mins</i>
Total:		<i>3 hours 45 mins (including break)</i>

How to prepare the programme

The video

Watch **The dreaded appraisal** and familiarise yourself with the characters, the lessons and the key sections of dialogue. Try to identify how the fictional situations shown in the video relate to your own organisation.

The session plan

Read the detailed instructions for each session so that you are clear what to do at each stage in the programme.

Varying the length of the programme

- **Compressing the programme.** If half a day is too long, you can cut the programme by about 2 hours by leaving out the exercises in Sessions 4, 5 and 6 and removing Session 7 - The appraisee's preparation - altogether
- **Extending the programme.** If you can devote more than half a day to the programme, you can include a role-playing session. The best place to put this is between Sessions 6 and 7 on the half-day programme

Briefs for four short role plays and an observer's checklist are provided on pages GTW-13 and 14 of the group training workbook.

Material for the participants

- You will need a copy of the group training workbook for each participant

Handouts and presentation 'slides'/OHPs

The packaging contains electronic formats of all the handouts and slides referred to in this manual.

They are supplied in Microsoft® Word® and PowerPoint® (Microsoft®, Word® and PowerPoint® are trademarks of Microsoft Corporation). You may customise these materials for your own requirements without infringing the copyright restrictions relating to this programme.

The exercise in Session 6

The instructions for this are as follows:

- Hand out copies of a job description of a typical employee in the organisation, or a job description for a role common to the majority of the delegates. Also hand out an imaginary description of the employee to be appraised, which describes any areas of weakness or strength in their performance that will need special discussion. Ask delegates, working in pairs, to draw up an agenda for the appraisal meeting
- Decide how you want to handle this exercise and prepare sufficient copies of the appropriate documents

Self-study workbook

There is also contained a self-study workbook. Individual users can either print out a copy of the workbook for themselves or save the file to the hard drive of their PC and work through the course on screen.

Equipment

You will need:

- a VCR/DVD player and a TV monitor or a computer with a DVD drive
- an overhead or LCD projector and screen
- a flipchart or white board

Room layout

All participants must be comfortably seated, able to hear you and to see you, the screen and the flipchart clearly. A U-shaped layout is ideal for groups of about a dozen people. If you have to run this course for larger groups than this, try to sit them at separate tables. This will encourage discussion and contribution.

If possible the training room should have:

- plain walls
- a high ceiling
- some natural light
- blackout facilities
- an adequate supply of sockets
- adjacent rooms for group work
- coffee/tea/lunch facilities

Joining instructions

Send out joining instructions to participants two to three weeks before the course. These should:

- Tell them where and when the course will take place, plus the start and finish times
- Include a copy of the course objectives and programme. There is a master of this on the disk
- Advise participants to think about their experiences of appraisal, both as appraiser and appraisee, and to identify what they specifically want to get from the programme. Ask them to bring a note of their objectives to the course
- Encourage them to arrange to discuss the course with their immediate boss, before and after they have taken part

Session 1: Introduction and objectives

10 mins

Welcome and housekeeping

- Welcome everyone
- Ask everyone to introduce themselves (if appropriate)
- Explain any housekeeping details (eg timing, catering, fire procedures)

Objectives

- Use OHP-1 to summarise the course objectives: **OHP-1**
 - understand the purpose of appraisal
 - prepare an effective appraisal discussion
 - begin the discussion positively, structure it as it unfolds, end it by agreeing the actions which arise from it
 - cope with awkward situations
 - identify specific actions to improve their appraisal discussions
- Use OHP-2 to explain how you will work together to achieve these. Stress the importance of using discussion to relate the general lessons from the video to participants' own working circumstances. **OHP-2**
- Give out the Group training workbooks. Ask participants to make a note of the specific objectives they identified before the course in the space provided on page GTW-4. **Workbooks**

Structure of the course

- Use OHP-3 to remind them of the outline programme. (The objectives and programme are reproduced in the workbook.) **OHP-3**

Session 2: The purpose of appraisal

15 mins

Video: introduction

- Explain that the video, **The dreaded appraisal**, is in a number of sections. The first of these is an introduction to the subject by the scriptwriter, Sir Antony Jay. **Video**

Discussion

- Lead a short brainstorm

Ask participants to brainstorm as many potential benefits of appraisal they can think of in three minutes. Then repeat the process for potential drawbacks. Record their ideas on a flipchart. **Flipchart**

Benefits can include:

- ability to step back from the day-to-day work
- training needs identified
- better teamwork
- motivation
- sorting out working relationships
- feedback for the manager
- clearer career directions

Drawbacks can include:

- it takes time
- it is not easy to do well
- can damage relationships if done badly
- difficult to discuss future actions when things are changing rapidly
- too much paperwork
- often difficult to measure performance

The remainder of the programme is all about how to get the benefits and avoid the drawbacks.

Definition

Conclude this session by using OHP-4 to define the purpose of appraisal. Check that participants are happy with this definition. **OHP-4**

Session 3: The appraiser's preparation

25 mins

Small group discussion

Divide the group into pairs or threes. Ask them to spend 10 minutes discussing what appraisers should think about when preparing to appraise one of their team. Ask them to record their ideas in their workbooks.

Workbooks

Discussion summary

Record the group's ideas on a flipchart. Highlight any important points you think they may have overlooked. Their answers may include: **Flipchart**

- What was agreed at the last appraisal. Check the record
- The appraisee's work over the appraisal period (not just last week!). What has gone well? Why? What has gone less well? Why?
- The appraisee's strengths and weaknesses
- Any significant changes in the appraisee's job. Check the job description
- Any factors which made the appraisee's job harder over the past appraisal period (Resources? Support from others? Working relationships? Unforeseen crises? Policy? etc.)
- Possible further training and development needs
- What the appraiser particularly wants the appraisee to achieve in the next appraisal period
- Arrangements for the discussion (privacy, appropriate venue, adequate time, paperwork, sufficient notice for the appraisee to prepare)

Tell the group that there is an appraiser's preparation checklist on page GTW-7 of the workbook. **Workbook**

Session 4: Getting people to open up

40 mins

Video excerpt

Explain that you are going to show a short section of the video which shows how not to start a discussion with someone who is nervous about speaking her mind. Ask participants to pay particular attention to what the appraiser, David, does wrong.

Play the David-Sharon discussion up to the point at which she leaves his office after failing to get him to listen to her. **Video**

Discussion

Lead a short discussion of what David did wrong. Answers might include:

- he was in too much of a hurry
- he didn't look at her and so missed her unhappy body language
- he had assumed everything was all right
- he didn't listen
- he had placed a barrier - his desk - between them
- he dismissed her concerns. Saying 'don't we all' is the worst way to respond when someone tells you how she is feeling

Video excerpt

Show the second part of the David-Sharon discussion, in which he gets it right. **Video**

Summary

Use OHP-5 to go through the four key learning points from this section of **The dreaded appraisal**. **OHP5**

- **An informal, unhurried atmosphere.** Seating arrangements matter - there should be no barriers and the two chairs must be the same height so that one person is not looking down on the other. Rapport building is very important, particularly with shy people. The ritual cup of coffee and some unthreatening, casual chat are important scene-setting activities
- **Praise and encourage.** People like Sharon sometimes convince themselves that appraisal is going to be an unpleasant experience. It is important to change their perception early on by congratulating them for their good work
- **Probe and listen.** Good appraisers ask open (*how, what* and *why*) questions to get the person talking, then probe for more information (*'tell me a bit more about...'*) and finally ask closed questions to confirm agreement and understanding
- **Give time to talk.** Advise the group not to be in too much of a hurry. People, particularly shy ones, need time to think. Silence, a friendly facial expression and, if necessary, encouraging prompts (*'take your time'*) will produce answers which rushing the appraisee will not

Tell the group that these points are summarised on page GTW-8 of the workbook. **Workbook**

Exercise

Explain that this exercise is called 'Tell us about yourself'. It provides practice in questioning and listening. Divide participants into groups of, ideally, three. If necessary, use groups of four.

Use OHP-6 to explain how the exercise works. **OHP-6**

It is your job to keep an eye on the time and tell the groups when each five minute questioning period is over.

After 15 minutes are up, stop the exercise and lead a short discussion about how it went. Stress the importance of using the right question for the right purpose at the right time.

Session 5: Facing up to the problem

45 mins

Video excerpt

Explain that you are going to show a short section of the video which shows how not to criticise someone, particularly if they are as touchy as Tracey! Ask participants to pay particular attention to what the appraiser, Emma, does wrong.

Play the Emma-Tracey discussion up to the point at which Tracey storms out of Emma's office. **Video**

Discussion

Lead a short discussion of what Emma did wrong. Answers might include:

- she didn't praise Tracey for what she had done well
- her criticism took Tracey by surprise
- she made remarks about Tracey's personality ("*You're slapdash*"), instead of describing what she had done - her performance
- she had no examples to back up her generalisations ("*I'm not happy about your work... Well, all of it really.*")
- her body language was a mixture of belligerent and nervous, instead of being open and direct
- she told Tracey about her behaviour, instead of asking her

Video excerpt

Show the second part of the Emma-Tracey discussion, in which she gets it right. **Video**

Summary

Use OHP-7 to go through the four key learning points from this section of **The dreaded appraisal. OHP-7**

- **Performance, not personalities.** Remind the group that appraisal is not therapy and they are not psychiatrists! Whatever we think about someone's personality, we are unlikely to be able to change it in one relatively short discussion. What we can change is behaviour, which means concentrating on performance

Warn the group to watch out for the word 'attitude'. Before you criticise someone's attitude you must be quite clear what, specifically, you don't like and how that shows up in practice, with examples.

- **Use positive language.** Remind the group about Emma saying:

"How can we get your reliability up to the same level as your other performance areas?"

If a person's performance was universally awful, you would be having a disciplinary interview with them, rather than appraising them.

- **Encourage self appraisal.** It is much less threatening to ask people what they think about their performance than simply telling them what you think. Of course, they will want your opinion. But if you have heard what they have to say first, you will often find that, when it is your turn, you can put a positive slant on what they have said (*"Sure, it's a pity you didn't quite hit the target, but think of the obstacles you had to overcome. What do you think you learned from the experience?"*)
- **No surprises!** At least, no negative ones. Tell the group that if something is going wrong they must address it at the time. They can certainly review progress on areas of improvement at appraisal time, but saving up bad news is simply asking for the reaction that Emma got from Tracey

Tell the group that these points are summarised on page GTW-9 of the workbook. **Workbook**

Exercise

Divide the group into pairs. Ask them to turn to the exercise on page GTW-10 of the workbook. Leave them to discuss the short case study for fifteen minutes. **Workbook**

Discussion

Find out what ideas the small groups have had. These should include:

- Collect information about:
 - his sales record
 - specific examples of times when he has handled customers well
 - previous occasions on which you have mentioned to him the problems of his not contributing to the team effort (if there aren't any you are in trouble!)
 - specific examples of the behaviour you want him to change

- Prepare questions, such as:

'We've talked about being a bit more of a team player. How do you think that's going? What have you tried to change?'

- Think about what to say when introducing the criticism. For example:

'You're great with customers and I'm sure neither of us would like to see your sales figures fall off. I have to say though that I'm still concerned about how customers get shared out between you and your colleagues. We've talked about this before. How do you see this issue?'

Session 6: Agreeing a plan for the future

45 mins

Video excerpt

Explain that in this case you are going to show the whole of the third example, the appraisal discussion between Don and Alan. This lasts about nine minutes. Ask the group to note what they think is important as they watch.

Play the whole of the Don-Alan sequence. **Video**

Discussion

What did Don do wrong? Answers should include:

- He had no structure for the discussion
- His criticisms were vague. There is a classic conversation which happens all too often in real appraisals:

Don: *Your rejection rate seems to be high.*

Alan: *How high?*

Don: *Well, high.*

Alan: *It's no higher than the others'.*

Don: *I'm sure it is.*

- He allows himself to be distracted. The argument about advertising is a complete red herring
- Even when he starts to get the discussion right, he still forgets to summarise and agree what Alan will do as a result

Summary

Use OHP-8 to go through the four key learning points from this section of **The dreaded appraisal. OHP-8**

- **Structure the interview.** Decide on the main performance areas you want to talk about. These may come from the job description, as in Alan's case, or they may be objectives you have agreed at the beginning of the appraisal period, or they may be a set of competences

If time allows you can use OHP-9 to go through an outline structure for a typical appraisal discussion. **OHP-9**

- **Focus on the facts.** This means two things. First, resisting the temptation to get sucked into irrelevant discussions. When Alan tries to go on about sacking the advertising agency, Don says:

Don: *No, I mean you. What can you do personally?*

Secondly, nail down generalisations. For example, when Alan starts to blame maintenance for not keeping appointments, Don says:

Don: *Can you give me chapter and verse?*

Alan: *Well, last week for instance.*

Don: *What happened?*

Alan: *They were only about three hours late.*

- **Agree measurable targets.** This is reasonably easy if, as in the video, they can be easily quantified. Tell the group that one of the benefits of appraisal is that it gives bosses and their team members the opportunity to talk about how they measure the achievement of targets, such as improving communication, which don't come with numbers attached
- **Set review dates.** Remind the group that appraisal is not supposed to be merely a once a year chore. To get the maximum benefit from it, it should be part of a never-ending process of improvement. That means agreeing targets, reviewing them and learning from how they have gone

Tell the group that these points are summarised on pages GTW-11 and 12 of the workbook. **Workbook**

Exercise

Hand out copies of a job description of a typical employee in the organisation or, a job description for a role common to the majority of the delegates. Also hand out an imaginary description of the employee to be appraised, which describes any areas of weakness or strength in their performance that will need special discussion. Ask delegates, working in pairs, to draw up an agenda for the appraisal meeting.

Ask them to put these on sheets of flipchart. Allow 15 minutes for them to complete this exercise.

Display the flipcharts side by side. Ask participants to explain their reasoning, particularly where one approach differs from the others.

Video summary

Pull together the lessons from this and the previous two sessions by playing the short summary which follows the Don-Alan section. **Video**

Session 7: The appraisee's preparation

15 mins

Video

Explain to the group that this final short section of video is about preparation from the appraisee's point of view. **Video**

Discussion

Go through the appraisee's preparation checklist on page GTW-16 of the workbook. Stress that participants can use this both to prepare their own appraisals with their bosses and also to encourage their team members to come properly prepared to appraisal discussions. **Workbook**

Session 8: Action plan

15 mins

Action plans

- Ask participants to complete the Action plan on page GTW-17 of the workbook. Give them about ten minutes to do so. **Workbook**
- Take a few examples of intended actions from the group

Course summary

- Use OHP-1 to summarise the ground you have covered. **OHP-1**
- Thank the group for their participation and bring the course to a close