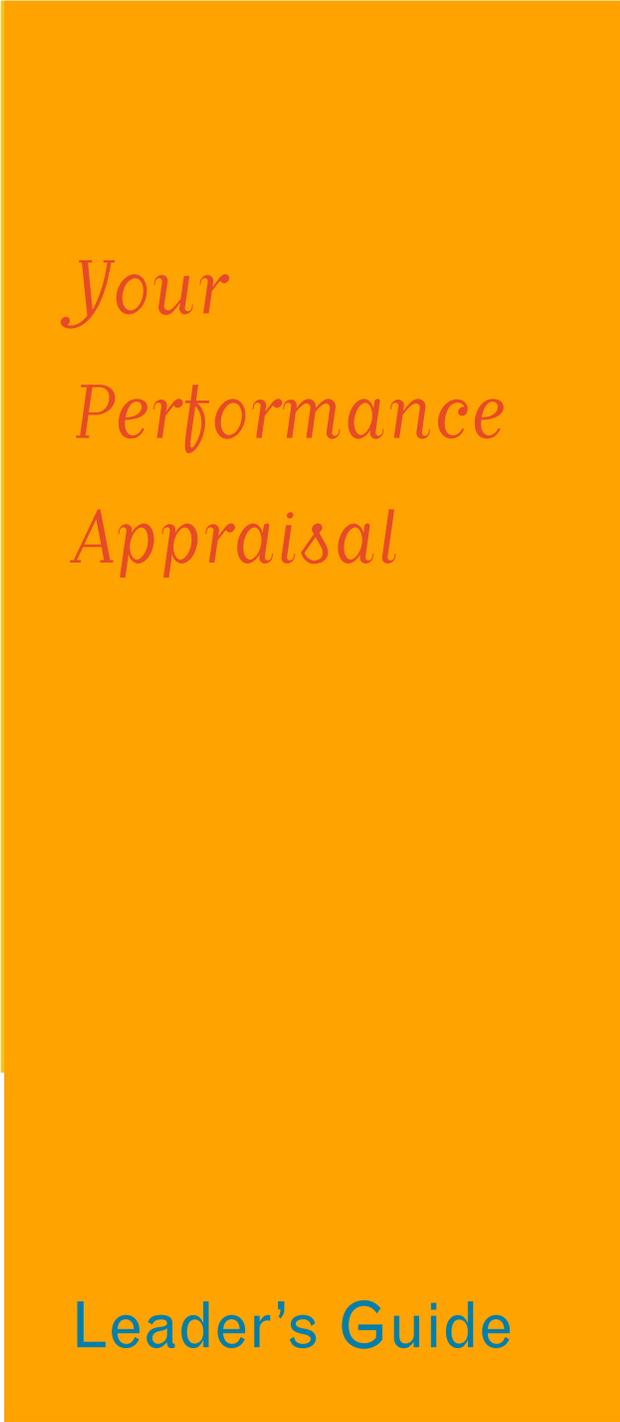


# LOOKING FORWARD



*Your  
Performance  
Appraisal*

Leader's Guide

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# INTRODUCTION

## About This Program

The program *Looking Forward: Your Performance Appraisal* program provides an employee's perspective on preparing for the performance appraisal process. During this program participants will learn that a performance appraisal is nothing to dread. Quite the contrary, employees will learn that the performance appraisal provides a rare opportunity to discuss job performance and use the discussion to learn and grow. All employees will benefit from this training. The companion program, *Care and Candor: Making Performance Appraisals Work* is designed to help managers and supervisors prepare a performance appraisal and lead a successful appraisal meeting. Consider using both of these programs for a comprehensive development opportunity for your entire organization.

This Leader's Guide is designed to help you conduct a thorough training session on preparing for a performance appraisal meeting. It offers ideas on how to use this program in different ways, giving your organization flexibility to determine which training format is best for its specific needs. The program is 12 minutes long. On the DVD, there is an option to show the program in scenes. On the DVD, a self-assessment is available on-screen. A Pre-Test and Post-Test are available in this leader's guide.

Training Points have been created on the DVD format of this program to provide visual aids when sharing important training material, or reviewing content of the program. Video links are included to provide visual reinforcement of some of the training points.

A PowerPoint® presentation, identical to the Training Points content of this program, has been included in both formats for your use. The customizable version is available for you to add specific information for your company. Tips for customizing this presentation are included at the end of this guide. As an alternative, the slide information may be printed or transferred to transparency sheets or a flipchart when used in conjunction with the program.

Illustrated handbooks are also available for use with this program. These handbooks cover the highlights of the training and are a helpful note-taking and reference tool.

We recommend that you tailor the program to your organization's needs by including specific information unique to your employees. The specifics of how you facilitate the program are up to you.

## Training Materials

There are a few things you'll need for an effective training session:

- A training room located away from major distractions or interruptions
- A comfortable arrangement of chairs and tables, preferably in a circular pattern, with an opening for a TV monitor and other visual aids (Be certain all participants can see the TV monitor and other visual aids)
- Adequate lighting that can be adjusted while viewing the video
- A location, possibly including a podium and/or a flipchart, from which the trainer/speaker can lead discussion
- The training program *Looking Forward: Your Performance Appraisal*
- TV and VCR or DVD player/computer with projector and remote
- Copies of the class agenda
- A copy of the handbook, paper and pencil for each participant
- A flipchart or dry-erase board and appropriate markers
- A computer with PowerPoint® software and the PowerPoint® Presentation
- Copies of any Worksheets or Handouts you plan on using, as well as the Post-Test and Evaluation.

## Preparation

Preparation is the key to effective training. There are several things you need to do prior to the session:

### Establish Objectives

Determine the training objectives in advance so that you can identify the best approach to take for the training session. It is also important to decide what level of understanding is expected from participants upon completion of the training. Suggested training objectives for this presentation are:

- List the steps to preparing for your performance appraisal.
- Explain ways to keep your attitude directed towards a productive meeting.
- Identify ways to reduce defensiveness to feedback.
- Specify a goal setting process focused on the future.

Feel free to edit the training objectives to meet the particular needs of your organization. Training objectives should reflect the content of the program.

### Determine the Audience

Another aspect to consider in planning this training session is the audience. Tailor your presentation to the skills or experience of the participants. The focus of your discussion and the depth of content presented may vary, depending on whether you are providing an orientation for new employees or a refresher course for experienced employees.

The ideal group size should range from 10 to 20 people. Most of the exercises in this program require that the group break into two smaller groups in order to increase participation. When the group is too large, individual attention may be lost.

## Agenda

### 1-Hour Session Agenda

Introduction	10 minutes
View Program and discuss	30 minutes
Exercises	10 minutes
Session Summary	10 minutes

### 2-Hour Session Agenda

Introduction	10 minutes
View Program and discuss	45 minutes
Exercises	45 minutes
Session Summary	10 minutes

## Invite participants

Send out letters or memos to participants or post a notice two weeks in advance of the training date. A sample is included on the next page. State the location, date and time, and meeting agenda. Administer the Pre-Test in advance.

## Sample Invitation

**Date:** *(Insert date)*

**To:** Managers

**From:** Amelia Banterez, Human Resources Manager

**Re:** *Looking Forward: Your Performance Appraisal Training Session*

Imagine you just realized you have a performance appraisal in two weeks. How would you react? If a moment of dread passes over you, you're not alone! We've put together a program to help you learn that performance appraisals are nothing to dread. Quite the contrary, you will learn that the performance appraisal provides a rare opportunity to discuss your job performance and use the discussion to learn and grow. During this program you'll learn how to prepare for your next performance appraisal.

Please plan to be at the training session on *(insert date)* at *(insert time.)* We will be meeting in the *(insert location)* for a *(insert duration)* session. If you are unable to attend, please contact me at *(insert contact information)* as soon as possible.

During the session, you will learn:

- The steps to preparing for your performance appraisal
- Ways to keep your attitude directed towards a productive meeting
- Ways to reduce defensiveness to feedback
- A goal setting process focused on the future.

### Our agenda will be:

Introduction	10 minutes
View Program and discuss	30 minutes
Exercises	10 minutes
Session Summary	10 minutes

To help us get the most out of our training session, please take the time to complete the enclosed Pre-Test, and return it to me by *(insert date)*. Your honest response to these questions will help us place emphasis on critical areas.

Please mark your calendar so you can attend this very important training session.

Thanks!

## Presentation Tips

### Overcoming anxiety

The best way to overcome anxiety about speaking before a group is to be prepared. Although it is natural to be nervous, your sweaty palms will disappear once you focus on what you are saying. Concentrate on communicating your message and your presentation will flow naturally.

### Choosing your vocabulary

It's best to use the same comfortable language that you would use when speaking one-on-one. Avoid jargon and overly complicated words or phrases.

### Getting rid of the “umms”

One of the most annoying mistakes a speaker makes is saying “umm” every time there is a break between thoughts. Remain silent while you think about what you're going to say next. The silence will seem longer to you than it will to the audience. If you remember this, you'll feel less pressure to fill the silence. You can control your “umms” by jotting down notes beforehand. If you want to include personal anecdotes or examples, write down a few notes to trigger your memory. Beware of writing down too much, however. You'll deliver your message to your note cards instead of your audience.

### Controlling the speed and tone of your voice

You'll put your audience to sleep if you speak too slowly, and they won't be able to keep up with the content if you speak too quickly. Approximately 150 words per minute is the best speed (that's about two thirds of a page, typed, double-spaced). Vary your tone often, especially when making an important point. Adding emotion to your presentation will keep your audience involved. Again, strive for a conversational tone.

### Sticking to the schedule

Begin class on time and restart the session promptly at the end of the break. Except for emergencies, participants should not be interrupted for messages.

### Asking for questions

Ask for questions throughout the session. Be prepared to answer all types of questions, but don't be worried you don't know every answer. You can simply say, “Let me find out for you and get back to you.” Keep in mind many questions are best answered through discussion. An appropriate response might be, “Good question. Let's hear some discussion on that one.” Watch the clock, though. Too many unplanned discussions can eat up your time.

## TRAINING SESSION OVERVIEW

### Presentation Outline

**Introduce yourself and the training session.** Welcome the participants and offer a brief explanation of the purpose of the session. Have participants introduce themselves and state the department or area in which they work. Use Slide 2 to introduce the objectives of the training session:

- List the steps to preparing for your performance appraisal.
- Explain ways to keep your attitude directed towards a productive meeting.
- Identify ways to reduce defensiveness to feedback.
- Specify a goal setting process focused on the future.

**Use an “icebreaker” to relax the class.** Explain your goals and expectations of the training session. Start the program. To avoid unpleasant surprises, it’s a good idea to pre-set the volume of your monitor before the training session begins.

## DISCUSSION GUIDES

Two discussion guides have been developed for this program. “Scene-Specific Discussion Guide” may be used if you choose to view and discuss the program in scenes and discuss as you go. The “Slide Discussion Guide” is designed for use in conjunction with the PowerPoint presentation after watching the program in its entirety.

### Scene-Specific Discussion Guide

The four chapters in this program help facilitate discussion. This guide is broken down with a summary of each segment of the program, offering discussion questions for each. The handbook is also a valuable tool for participants to use during the discussion and exercises, and to take back to their workplaces as a handy resource following the program.

### Prepare for the Appraisal

The program opens with the steps to follow when preparing a performance appraisal. Pages 4–5 of the handbook contain this information as well. At the end of this chapter, participants are asked to determine what information they should bring to the appraisal meeting by selecting “Yes” or “No” for each option offered. Once participants have arrived at consensus, select their response. If correct, their response is affirmed. If incorrect, remediation is offered. Continue the discussion by asking participants the following questions:

- James said being prepared for his appraisal boosted his self-confidence. What other benefits are there to you to being prepared for your next appraisal?
- Has your supervisor ever asked you for feedback on his/her performance? How did you handle this question? Would you handle it differently now? Why or why not?

### Check Your Attitude

The second scene in this program focuses on attitude. At the end of the scene, participants are asked what James will need to do to have a successful appraisal meeting by selecting “Yes” or “No” for each option offered. Once participants have arrived at consensus, select their response. If correct, their response is affirmed. If incorrect, remediation is offered. Continue the discussion by asking participants the following questions:

- Do you think James’ statement “We all have certain blinders about ourselves” is true? Why or why not?
- Is it reasonable to suggest you tell a supervisor if they’ve forgotten information or misunderstood details about your performance? Why or why not?
- How do you keep from being defensive?

### Listen and Share

Because James was prepared for the appraisal, he wasn’t surprised by his supervisor’s assessment of his performance. This preparation allowed him to remain open to feedback, and focus on improvement, rather than defensiveness. Use pages 6-10 during this portion of the program. At the end of the scene, a multiple choice question is offered for discussion. Once participants have arrived at consensus, select their response. If correct, their response is affirmed. If incorrect, remediation is offered. Continue the discussion by asking participants:

- Could you be this open to feedback and candid with your questions during your next appraisal? If yes, why? If no, how can you prepare yourself to feel comfortable during your next evaluation?

### Look Forward

This chapter concludes the program with a focus on continuous improvement in the future. Use slide 8 to share the steps for setting SMART goals. This information is also referenced on page 11 of the handbook. At the end of this chapter the question “How will you prepare for your next performance appraisal?” is offered for discussion. Continue the discussion with the following questions:

- How do you ask for what you want?
- Are you prepared to compromise? Can you break your needs into smaller, more reachable goals?

## Slide Discussion Guide

Follow the program with a discussion. Discuss the following highlights using the Training Points or PowerPoint® presentation to support your discussion.

### Slide 1: Title Slide

### Slide 2: Objectives

Review program objectives with participants using slide 2.

### Slide 3: Preparation

Slide 3 lists the steps to follow when preparing for a performance appraisal meeting.

### Slide 4: Documentation

Use this slide to review the documentation to refer to when preparing the self-evaluation portion of a performance appraisal.

### Slide 5: Check Your Attitude

This slide suggests ways for the employee to prepare emotionally for the performance appraisal meeting.

### Slide 6: Listen and Share

Use this slide to establish two-way communication during an appraisal meeting.

### Slide 7: Look Forward

This slide provides tips for setting personal and performance goals for the next evaluation period.

### Slide 8: SMART Goals

This slide explains the SMART acronym for goal setting.

## EXERCISES

The following exercises are provided for use after the discussion. Refer to the agenda to determine which exercises you have scheduled in your training session. Make sure you stick to the time schedule for each exercise to avoid running out of time at the end of the training session.

### Exercise #1: In Case My Supervisor Asks...

**Time:** 10 minutes

**Materials:** A copy of Worksheet 1: In Case My Supervisor Asks... and a pencil for each participant

**Purpose:** To provide participants an opportunity to consider how their supervisor is helping them achieve success at work.

**Instructions:** Ask participants to consider each of the following statements, and select “yes” or “no” for their response. They should be honest, and use these thoughts as they assess how much they’ve helped their supervisor support them. Encourage participants to note examples to use during their next performance appraisal meeting.

1. My supervisor provides me feedback about my performance on a regular basis.

Yes    No

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2. I have kept my supervisor informed about my progress.

Yes    No

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3. My supervisor is well aware of my needs to achieve my goals.

Yes    No

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4. My supervisor makes sure I have what I need to achieve my goals.

Yes    No

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5. I have expressed concerns to my supervisor.

Yes    No

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6. My supervisor is responsive to my concerns.

Yes    No

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7. My supervisor seeks my input.

Yes    No

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8. I have shared observations with my supervisor.

Yes    No

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9. My supervisor will not be surprised by my plans and goals.

Yes    No

---

---

10. I expect my supervisor will support my ideas for future growth.

Yes        No

---

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PREVIEW

## Exercise #2: Preparing for your Appraisal

**Time:** 20 minutes

**Materials:** A copy of Worksheet 2: Preparing for your Appraisal and a pencil for each participant

**Purpose:** To provide participants an opportunity to think about their next performance appraisal.

**Instructions:** Ask participants to consider each of the following questions and respond. As an alternative, you could use these questions in small group discussion.

1. What changes should you make to your documentation in order to feel prepared for your next appraisal meeting?
2. What do you want to get out of your next performance appraisal?
3. How can you ensure you arrive with the right attitude at your next appraisal meeting?
4. What have been your successes since your last appraisal?
5. What results did you achieve during the past evaluation period?
6. What obstacles have you encountered in your work? Why did the obstacles arise? What can you do about these obstacles?
7. Do you have the necessary resources to meet your goals? What additional resources do you need?
8. Is there training you need to do your work more effectively? How can you find this training?
9. What are your supervisor's goals? How can you help him reach his goals?
10. What are your company's goals? How do your goals feed into company goals?

### Exercise #3: Rewind and Re-record

**Time:** 20-60 minutes

**Materials:** A copy of **Handout 1: Rewind and Re-record** and a copy of **Worksheet 3: Observer's Notes** for each participant.

**Purpose:** To provide participant's an opportunity to practice receiving performance feedback and responding to their supervisor.

**Instructions:** Divide participants in groups of 3. The length this exercise will take may be determined by deciding how many scenarios each group will play. It is suggested that the roles change at least 3 times, so that each participant has an opportunity to be the "employee", the "manager" and the "observer". Assign each group one scenario to begin with. Each scenario will take approximately 5 minutes to play, 5 minutes for the observer to share observations, and 10 minutes for group discussion, totaling 20 minutes per role-play. The scenarios provided on Handout 1 are as follows:

#### Scenario 1: Was It That Important?

MANAGER: You've missed three of those meetings during the last two quarters.

EMPLOYEE: But I thought they were optional. I've been missing meetings all week...I never realized it was a problem.

MANAGER: Well I'm telling you now your attendance is mandatory. But that's not the only reason you scored low in this category... you've also been consistently coming to work late.

EMPLOYEE: But I'm always here by 8:15. The switchboard doesn't even open until 8:30.

MANAGER: (Ad lib from here, and see where it takes you!)

EMPLOYEE: (Ad lib from here, and see where it takes you!)

#### Scenario 2: Whose Job Description?

EMPLOYEE: ...frustrated! That's the only word I can think of right now. I had no idea you expected quarterly updates on those contracts!

MANAGER: It's right here in your job description.

EMPLOYEE: Yes, but Purchasing has been handling all of that. My job description hasn't been updated.

MANAGER: (Ad lib from here, and see where it takes you!)

EMPLOYEE: (Ad lib from here, and see where it takes you!)

#### Scenario 3: Are You Done Yet?

MANAGER: I know you're working hard on those reports I assigned, but you keep getting them to me late. I can't prepare next year's budget unless I know exactly how much money each contract brought in this year. So you're going to have to get them in to me by tomorrow afternoon. Okay?

EMPLOYEE: Sorry. Sometimes I have trouble prioritizing... I didn't realize they were that important.

MANAGER: Well, they are important, and I need your reports on time from now on, OK?

EMPLOYEE: (Ad lib from here, and see where it takes you!)

MANAGER: (Ad lib from here, and see where it takes you!)

**Scenario 4: Got a Minute?**

MANAGER: Right now is a really good time for me to do your performance appraisal. Do you have a few minutes?

EMPLOYEE: (He really doesn't) Right now?

MANAGER: Won't take long, promise.

EMPLOYEE: (Reluctant) Yeah, okay....I guess.

MANAGER: Great! Meet you in five minutes, my office.

5 minutes later...

EMPLOYEE: Now, I wasn't supposed to bring anything with me, was I?

MANAGER: No, no you're fine. Here's your evaluation.

EMPLOYEE: (Reading) Well, according to this I did a very good job.

MANAGER: Sure you did! You did fine.

EMPLOYEE: (Ad lib from here, and see where it takes you!)

MANAGER: (Ad lib from here, and see where it takes you!)

After the observer has shared observations, use the following questions for group discussion:

- What worked?
- What didn't?
- How did the "employee" react to the manager's approach?
- Was the employee able to change the tone of the meeting through attitude?
- Did a collaborative effort surface? Describe it.

**Exercise #4: SMART Goals**

**Time:** 10 minutes

**Materials:** A copy of **Worksheet 4: SMART Goals** for each participant.

**Purpose:** To provide participants an opportunity to turn goals into SMART goals.

**Instructions:** Ask participants to transform the following goals into SMART goals by applying the SMART acronym. Use slide 8 as a reminder.

1. I will be more reliable. \_\_\_\_\_
2. My work will be more accurate. \_\_\_\_\_
3. I will keep my work station clean. \_\_\_\_\_
4. I won't gossip. \_\_\_\_\_
5. I will keep my sales up! \_\_\_\_\_

**Sample SMART goals include:**

1. My work day begins at 8:00, so I will make every effort to be here by 7:55 each day. When I find I am going to be unavoidably late, I will call my supervisor. I will keep track of my progress on a calendar.
2. I know it is important that my work be error free. When I submit work with errors, it impacts the work of others on the team, and in the end, the company. In the future, I will apply spell check or ask for a peer to review my work before submitting it. I will keep track of improvements in this area, by noting when my work is done well, and when I could have done better.
3. For the safety of everyone, it is important that my work station be clean and free of obstacles. At the end of each day, I will allow time to put my work away, and pick up anything remaining on the countertops or on the floor.
4. Spreading information along the grapevine is destructive to the morale of my peers. I will exercise caution when choosing to share a story about someone I work with. I know it is best to respect the privacy of those who choose to confide in me. In the future, if I am in doubt, I won't say it. If I make a mistake, I will apologize. For my own personal development, I will keep track of when I don't handle this area of my performance as well.
5. Over the next 6 months I will work towards a 2% increase in sales. I will meet bi-monthly with my supervisor to see how things are going as I work to achieve my goal.

## SESSION SUMMARY

One summarizing technique is to review the course objectives with the class. Another is to ask each participant to summarize what was learned from the training session. Ask the participants if they have any final questions.

### Administer the Post-Test

Prior to the program, decide which tool to use for assessment. On the DVD, an on-screen self-assessment with answer key is available. This easy to use assessment tool consists of 10 multiple choice questions. Responses may be recorded individually or discussed as a group. A Pre-Test/Post-Test has been included in this leader's guide. These assessments are an excellent tool for determining how much each participant learned during the session.

## PRE/POST-TEST ANSWER KEY

Please read each question carefully and write your answer in the space provided below it.

1. What purposes has performance appraisals fulfilled for you?

Answers will vary.

2. What are some of the benefits of performance appraisals?

Answers will vary, and will include:

- Chance to discuss their performance
- Opportunity to learn and grow

3. How can you prepare for your next performance appraisal meeting?

Answers may vary, but should include:

- Ask for 2 weeks to prepare
- Gather documentation
- Review accomplishments
- Complete requested forms
- Prepare feedback on supervisor's performance
- Develop goals for future performance.

4. What types of documentation should you refer to when preparing for your performance appraisal?

There may be other forms of documentation an employee should refer to, but the list should at least include:

- Job description
- Notes on topics you want to address
- Attendance records
- Goals set during prior period.

5. How can you prepare yourself mentally and emotionally for your performance appraisal meeting?

Each person prepares for an evaluation of performance in different ways. Expect answers to include some of the following:

- Be ready to listen and share
- Avoid defensiveness
- Set aside emotions
- Focus on improvement
- Offer respect
- Ask for examples.

6. How can you avoid becoming defensive during an appraisal meeting?

Answers will vary, but may include:

- Ask for further information
- Set aside emotion and listen
- Focus on how to improve performance
- Remember the purpose of the appraisal – to move you forward in your job.

7. What criteria should you apply when setting goals?

It is useful to apply the SMART acronym when setting goals.

**S**pecific

**M**easurable

**A**chievable

**R**ealistic

**T**ime sensitive

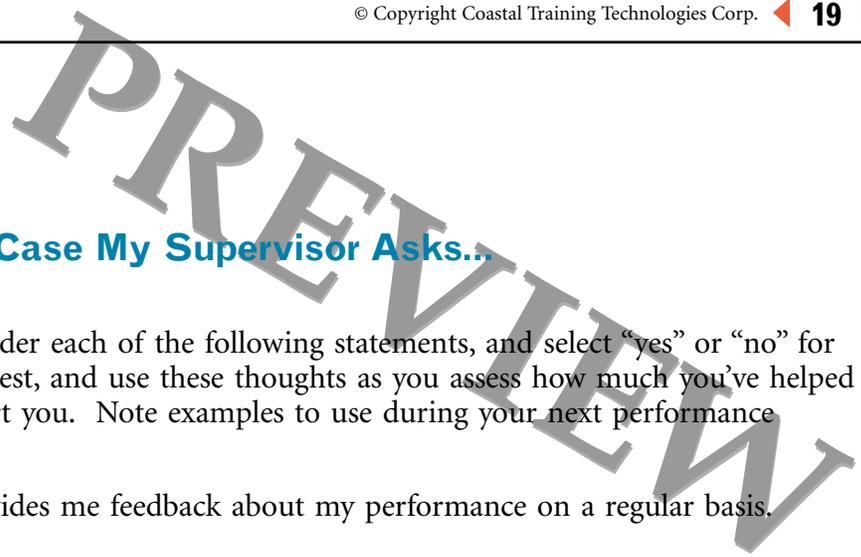
8. Should you evaluate your supervisor? If yes, how? If no, why not?

Yes, you should be prepared to share evaluation information about your supervisor.

## EVALUATION

Distribute the evaluation form to each participant when he or she has finished answering the questions on the Post-Test. When each class member turns in the evaluation form, thank him or her for attending and contributing to the session.

# WORKSHEETS



## Worksheet 1: In Case My Supervisor Asks...

**Time:** 10 minutes

**Instructions:** Consider each of the following statements, and select “yes” or “no” for your response. Be honest, and use these thoughts as you assess how much you’ve helped your supervisor support you. Note examples to use during your next performance appraisal meeting.

1. My supervisor provides me feedback about my performance on a regular basis.

Yes    No

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---

2. I have kept my supervisor informed about my progress.

Yes    No

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3. My supervisor is well aware of my needs to achieve my goals.

Yes    No

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4. My supervisor makes sure I have what I need to achieve my goals.

Yes    No

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5. I have expressed concerns to my supervisor.

Yes    No

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6. My supervisor is responsive to my concerns.

Yes    No

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7. My supervisor seeks my input.

Yes    No

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8. I have shared observations with my supervisor.

Yes      No

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9. My supervisor will not be surprised by my plans and goals.

Yes      No

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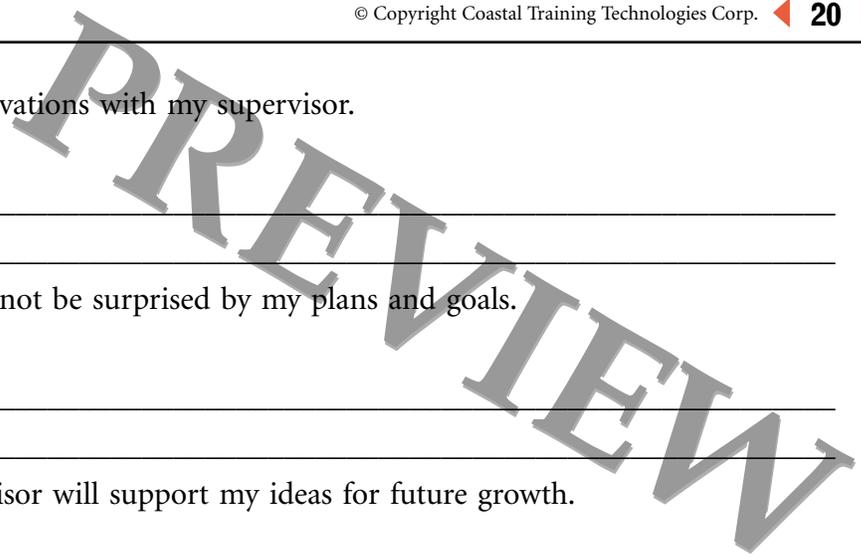
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10. I expect my supervisor will support my ideas for future growth.

Yes          No

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## Worksheet 2: Preparing for your Appraisal

**Time:** 20 minutes

**Instructions:** Consider each of the following questions and respond.

1. What changes should you make to your documentation in order to feel prepared for your next appraisal meeting?  
\_\_\_\_\_  
\_\_\_\_\_
2. What do you want to get out of your next performance appraisal?  
\_\_\_\_\_  
\_\_\_\_\_
3. How can you ensure you arrive with the right attitude at your next appraisal meeting?  
\_\_\_\_\_  
\_\_\_\_\_
4. What have been your successes since your last appraisal?  
\_\_\_\_\_  
\_\_\_\_\_
5. What results did you achieve during the past evaluation period?  
\_\_\_\_\_  
\_\_\_\_\_
6. What obstacles have you encountered in your work? Why did the obstacles arise? What can you do about these obstacles?  
\_\_\_\_\_  
\_\_\_\_\_
7. Do you have the necessary resources to meet your goals? What additional resources do you need?  
\_\_\_\_\_  
\_\_\_\_\_
8. Is there training you need to do your work more effectively? How can you find this training?  
\_\_\_\_\_  
\_\_\_\_\_
9. What are your supervisor's goals? How can you help him reach his goals?  
\_\_\_\_\_  
\_\_\_\_\_
10. What are your company's goals? How do your goals feed into company goals?  
\_\_\_\_\_  
\_\_\_\_\_

### Worksheet 3: Rewind and Re-record Observer's Notes

**Instructions:** Consider the following while observing the role-play. Be prepared to share your observations with your group.

How did the “employee” react to the manager’s feedback this time?

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Did the “employee” use attitude to change the tone of the meeting?

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What would you try differently? Why?

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## Worksheet 4: SMART Goals

**Time:** 10 minutes

**Instructions:** Apply the SMART acronym each of the following goals.

**S**pecific

**M**easurable

**A**chievable

**R**ealistic

**T**ime sensitive

1. I will be more reliable. \_\_\_\_\_
2. My work will be more accurate. \_\_\_\_\_
3. I will keep my work station clean. \_\_\_\_\_
4. I won't gossip. \_\_\_\_\_
5. I will keep my sales up! \_\_\_\_\_

## HANDOUTS

### Handout 1: Rewind and Re-record

Instructions: Divide the role of “employee”, “manager” and “observer” amongst your group. If you have more than 3 members in your group, the additional person(s) may be observers. Read the scenario assigned to your group, and then consider the question that follows. Role-play your version while the observer takes notes. Remember to show you care for the employee and their development. Be candid and collaborate with the employee to identify solutions.

#### Scenario 1: Was It That Important?

MANAGER: You’ve missed three of those meetings during the last two quarters.

EMPLOYEE: But I thought they were optional. I’ve been missing meetings all week... I never realized it was a problem.

MANAGER: Well I’m telling you now your attendance is mandatory. But that’s not the only reason you scored low in this category... you’ve also been consistently coming to work late.

EMPLOYEE: But I’m always here by 8:15. The switchboard doesn’t even open until 8:30.

MANAGER: (Ad lib from here, and see where it takes you!)

EMPLOYEE: (Ad lib from here, and see where it takes you!)

#### Scenario 2: Whose Job Description?

EMPLOYEE: ....frustrated! That’s the only word I can think of right now. I had no idea you expected quarterly updates on those contracts!

MANAGER: It’s right here in your job description.

EMPLOYEE: Yes, but Purchasing has been handling all of that. My job description hasn’t been updated.

MANAGER: (Ad lib from here, and see where it takes you!)

EMPLOYEE: (Ad lib from here, and see where it takes you!)

#### Scenario 3: Are You Done Yet?

MANAGER: I know you’re working hard on those reports I assigned, but you keep getting them to me late. I can’t prepare next year’s budget unless I know exactly how much money each contract brought in this year. So you’re going to have to get them in to me by tomorrow afternoon. Okay?

EMPLOYEE: Sorry. Sometimes I have trouble prioritizing... I didn’t realize they were that important.

MANAGER: Well, they are important, and I need your reports on time from now on, OK?

EMPLOYEE: (Ad lib from here, and see where it takes you!)

MANAGER: (Ad lib from here, and see where it takes you!)

**Scenario 4: Got a Minute?**

MANAGER: Right now is a really good time for me to do your performance appraisal. Do you have a few minutes?

EMPLOYEE: (He really doesn't.) Right now?

MANAGER: Won't take long, promise.

EMPLOYEE: (Reluctant) Yeah, okay...I guess.

MANAGER: Great! Meet you in five minutes, my office.

5 minutes later...

EMPLOYEE: Now, I wasn't supposed to bring anything with me, was I?

MANAGER: No, no you're fine. Here's your evaluation.

EMPLOYEE: Well, according to this I did a very good job.

MANAGER: Sure you did! You did fine.

EMPLOYEE: (Ad lib from here, and see where it takes you!)

MANAGER: (Ad lib from here, and see where it takes you!)

What could the employee do to make the most of this appraisal? Role-play your new attempt at addressing this concern.

## PRE/POST-TEST

Please read each question carefully and write your answer in the space provided below it.

1. What purposes have performance appraisals fulfilled for you?

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2. What are some of the benefits of performance appraisals?

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3. How can you prepare for your next performance appraisal meeting?

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4. What types of documentation should you refer to when preparing for your performance appraisal?

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5. How can you prepare yourself mentally and emotionally for your performance appraisal meeting?

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6. How can you avoid becoming defensive during an appraisal meeting?

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7. What criteria should you apply when setting goals?

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8. Should you evaluate your supervisor? If yes, how? If no, why not?

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# COURSE EVALUATION

Your input is IMPORTANT in helping us evaluate and improve our training programs. Thank you for taking time to think about and respond to the following questions.

Course: \_\_\_\_\_ Date: \_\_\_\_\_ Facilitator: \_\_\_\_\_

## About the Course

1. Were the objectives of the course clearly stated? YES NO
2. How well were the objectives met by the course?  
Were not met 1 2 3 4 5 Were met very well
3. How applicable will this training be to your job?  
 Almost none of the material will be applicable to my job.  
 Some will be applicable, but some was confusing or irrelevant.  
 Absolutely applicable! I look forward to seeing results soon!
4. Was the information presented in a logical and understandable order?  
 Didn't seem logical at all.  
 Some was, some wasn't.  
 Yes, all of it seemed logical and understandable.
5. How useful were the discussions and the exercise(s) in helping you learn the information?  
 Not useful at all  Somewhat useful  Very useful
6. To what extent did this training meet your expectations?  
 DID NOT meet my expectations  MET expectations  EXCEEDED expectations
7. What would you add or change to improve this course?

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## About the Facilitator

8. Was the facilitator positive and professional? \_\_\_Very much so \_\_\_Could improve
9. How well was the facilitator prepared and able to explain the information?  
NOT well prepared 1 2 3 4 5 VERY well prepared
10. Did the facilitator create an atmosphere that encouraged questions and learning?  
 Yes  No – Facilitator should have: \_\_\_\_\_
11. Did the facilitator explain the material in ways that made it applicable to your job?  
 Very much so  Sometimes  Almost none was connected to my job
12. Your comments on the facilitator:

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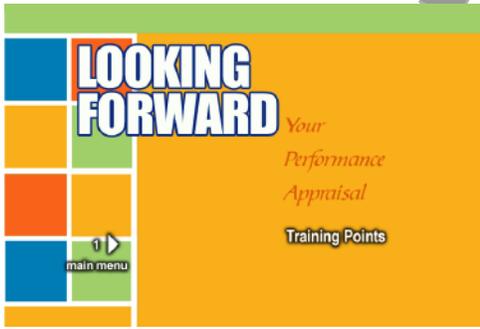


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# TRAINING POINTS AND POWERPOINT® OVERVIEW



Title Slide 1

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Slide 2

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Slide 3

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Slide 4

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# TRAINING POINTS AND POWERPOINT® OVERVIEW Continued

**Check Your Attitude**

- Be ready to listen and share
- Avoid defensiveness
- Set aside emotions
- Focus on improvement
- Be respectful
- Ask for examples

Slide 5

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**Listen and Share**

- Make the best use of your time
- Understand criteria for rating performance
- Ask for feedback
- Seek more information
- Be open

Slide 6

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**Look Forward**

- Share what you want to achieve
- Set SMART goals
- Ask for the help you need to attain goals
- Be candid and specific

Slide 7

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**SMART Goals**

- Specific
- Measurable
- Achievable
- Realistic
- Time sensitive

Slide 8

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## CUSTOMIZING A POWERPOINT PRESENTATION

The PowerPoint® presentations included on the Coastal DVD and CD products are customizable when used on a computer loaded with Microsoft PowerPoint® software. (Note: In the following instructions, “click” implies a click with your left mouse button. If a “right” click is necessary, it will be so indicated.) Microsoft PowerPoint® has many features.

The following steps will help you customize our presentations quickly. To customize a presentation:

1. If the “Customizable Version” icon is displayed on the landing screen, click on this option. If this option is not available, click on the PowerPoint® presentation to open it. Save this presentation to another location, such as your hard drive or a folder on the network. You will make your customizations on the saved version.

### **To add, copy, hide or remove a slide, or to change the order of the slides in the presentation:**

2. Click on “View” on the menu bar.
3. Click on “Slide Sorter” from the “View” menu. Or, under the “Normal” view, you may use the “Outline” on the left side of the screen.
4. To add a slide, place your cursor in front of the slide where you want to add a slide. Click on “Insert” on the menu bar. Then, click on “New Slide” on the “Insert” menu. Or, click on the “New Slide” tool on the tool bar. Choose a slide format to fit your desired content, and follow the prompts given.
5. Sometimes it’s easier to copy a slide, and then change the content of the slide than to create a new one. To copy a slide, click on the original slide. Click on “Edit” on the menu bar, and choose “Duplicate.” A new copy will be created to the right of the original slide. Or, click on “Edit” on your menu bar, and choose “Copy.” You may then “Paste” the slide wherever you want it to appear.
6. To hide a slide from your presentation, but to keep it for future use, right click on the slide you wish to hide, and choose “Hide Slide” from the menu. Or, click on the “Hide Slide” tool on the tool bar.
7. To remove a slide from the presentation, click on the slide you want to remove. Click on “Edit” on the menu bar. Then, click on “Delete Slide” on the “Edit” menu. Or, click on the slide, and press the “Delete” key on your keyboard.
8. To change the order of the slides in the presentation, click on the slide to be moved and while holding the mouse button depressed, drag the slide to its new location. Release your mouse button to place the slide.

### **If you wish to change or remove the animation effect as you move from slide to slide:**

1. Double click on the slide you want to change the animated transition on.
2. Double click on the text box of the slide. A border and white handles appear around the text box.
3. Click on “Slide Show” on the menu bar. Then, click on “Preset Animation.” To turn off the effect, choose “Off.” If you wish to change the effect, there are many options to consider.

### **To edit content of any slide:**

1. Double click on the slide you want to change.
2. Double click on the text box of the slide. A border and white handles appear around the text box.
3. Type the desired changes.

**Remember to save any changes made to your presentation!**

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