



Performance Reviews (1 Day) ST00129

COURSE GOAL: The student will learn effective methods for planning and conducting performance reviews, as well as how to undertake correction with regards to performance challenges.

PREREQUISITES: None

LEARNING OBJECTIVES:

Upon completion of this course the student will be able to:

- Understand the basics of performance evaluations and why to undertake an evaluation project.
- Plan and create the essential items to run a successful performance evaluation.
- Conduct a performance evaluation.
- Correct any performance challenges discovered effectively and quickly.

KEY TOPICS:

I. The Productive Appraisal

- A. What's the Point
- B. How Can Appraisals Be Productive
- C. It's The Process that Counts
- D. Test Yourself
- E. It's as Easy as One, Two, Three
- F. Evaluation and Job Analysis
- G. The Job Analysis Form
- H. The Performance/Work Habits Review Form
- I. Red-Flag Warning!
- J. The Appraisal Interview
- K. The Post Appraisal Meeting
- L. Face-to-Face
- M. A Good Beginning
- N. Discuss Quality of Performance
- O. Ask For Input
- P. Watch What You Say – And How You Say It
- Q. Setting the Scene

II. How to Make It Happen:

Advanced Preparations

- A. Plan for the Future
- B. How Supervisors Can Help
- C. Working Out A Plan
- D. Counseling the Plateaued Employee
- E. Document, Document, Document
- F. Start At The Beginning
- G. Documentation Serves as Protection Too
- H. Don't Spring Negative Surprises
- I. Documentation Keeps You Objective
- J. Prepare Yourself

- K.** Avoid Errors in Performance Reviews
- L.** Be Prepared
- M.** Treat Adults Like Adults
- N.** Checklist: Don't Start Without It
- O.** Prepare Your Employee
- P.** Set Things Straight
- Q.** Set Goals

- I.** Rating Yourself
- J.** A Final Checklist

III. Common Problems and Effective Solutions

- A.** When You Disagree on Roles and Goals
- B.** Titles – A Matter of Semantics
- C.** Precedence – Is It Set in Stone?
- D.** Disagreements on the Job Description
- E.** Agreements on the Job Description
- F.** Clashing On Goals
- G.** Asking The Right Questions
- H.** When the News Is Bad
- I.** Guidelines for an Appraisal with A Poor Performer
- J.** A Question of “Attitude”
- K.** Dealing with Emotional Outbursts
- L.** The Importance of Follow Up
- M.** Watch Out for Pitfalls
- N.** Keep It Strictly Business
- O.** Don't Talk Dollars
- P.** The Trouble Zones

IV. Wrapping It Up

- A.** The Post-Appraisal Meeting
- B.** A Summary of the Process
- C.** Your Rights and Responsibilities as a Supervisor
- D.** The Status Quo
- E.** Save the Money for Last
- F.** An Issue of Mechanics
- G.** You're Ready to Go
- H.** When Will I Find The Time?