



legacybowesgroup

Your Talent Management Specialists

Performance Management & Performance Appraisal



How would you define Performance Management

It is an ongoing process that provides feedback, accountability, and documentation for performance outcomes. It helps employees to channel their talents toward organizational goals.



What are the benefits of Ongoing Performance Management



Employees always know where they stand

Constant opportunities for development & coaching

Consistent accountability and feedback

Easier to monitor and evaluate employee performance

Encourages open lines of communication

Ability to address small issues quickly

Increased job satisfaction

Effective Performance Management

Clarifies job responsibilities and expectations

Improves individual and group productivity

Develops employee skills to their fullest extent through effective feedback and coaching

Drives behaviors to align with the organization's core values, goals and strategy

**Performance
Planning**

**Performance
Appraisal**

**Ongoing
Feedback**

**Performance
Management
Process**

**Performance
Evaluation**

**Employee
Input**

Performance Planning

- 1. Develop and/or review position description**
- 2. Establish performance expectations** (*expected results and professional behaviours*)
 - What are some examples of performance results we may be looking for?**
 - What are some examples of professional behaviours?**
- 3. Identify tools, training and resources**



Ongoing Feedback

- 1. Immediate positive & developmental feedback**
- 2. Be specific about appropriate and inappropriate behaviors**
- 3. Get the employee's view about what could have been done differently**
- 4. Focus on facts not personal characteristics**
- 5. Collaboratively plan steps to address developmental and resource needs**



Employee Input

- 1. Ask the employee for their input about their performance.**
- 2. Ask for situations or circumstances they have dealt with.**
- 3. Ask what specific actions did they take to achieve results.**
- 4. Have them describe the impact of the accomplishment on the work unit or organization.**
- 5. Ensure their input is in writing for review and discussion.**



Performance Evaluation

- 1. Determine key performance factors and expectations for evaluation.**
- 2. Define expected behaviours and skills and be prepared to explain why an employee was evaluated in a particular way.**
- 3. Provide a job-relevant basis for evaluating all employees to ensure fairness**

Performance Appraisal

How would you define Performance Appraisal

Formal process of assessing employee performance by comparing their performance against established standards and providing feedback for the purpose of acknowledging good work and opportunities for improvement.



What are the Pro's & Con's



**Having
Performance
Appraisals**



**Not Having
Performance
Appraisals**

4 important functions

- 1. Provide feedback to the employee on their overall contribution over a period of time.**
- 2. Provide an opportunity to recognize and acknowledge exceptional employee performance**
- 3. Identify development needs and opportunities for improvement**
- 4. Provide information to help determine future salary and bonus reviews**



Performance Appraisal

- 1. Managers should discuss with employees their results and rationale for the evaluation given.**
- 2. Plan developmental activities with employees.**
- 3. If current job standards are being met, employees and managers can look to the next level's performance standards to identify developmental areas to pursue in preparation for advancement.**

The Appraisal Discussion

State the purpose of the meeting

Explain the process

Inform employee what can come out of meeting, including future assignments, clear communication, increased duties, and training

Help the employee feel at ease and receptive

Avoid criticism of personality or personal traits





The Appraisal Discussion

Apply listening skills to separate facts from opinions

Conclude with a summary of the main points of the discussion

Inform employee of the option to respond to the appraisal

Have employee sign the form, or set a mutually agreeable date for signing the final form

Follow-up

Finalize document and forward to employee for signature and comments

File signed original in employee's file

Provide ongoing coaching/feedback throughout the year

Catch your employees doing something right & let them know you appreciate it!



What Developmental Strategies could you offer?

Job / Task Shadow – model / show & follow / do

Education – Formal (university/college), timely, relevant workshops, seminars

Self Study – watch video, on-line learning, read books

Coaching – working with someone to provide guidance and support



Legal Guideline Reminders

Must be evaluated on factors that are relevant to their job

Employees must know what is expected of them and the standards against which they will be evaluated at the beginning of the evaluation period

Have a standard, well-documented procedure for how the performance management process will be conducted, with defined roles and responsibilities for employees and managers

Managers should be trained on the process and relevant skills required to implement the process effectively

Keep records to document examples of effective and ineffective employee performance to substantiate their evaluations

Provide a process where employees can formally comment on and appeal their performance evaluations

Thank You!

