

Title:

Get Your Performance Appraisal Discussions Off To A Good Start (Part 1)

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Summary:

Too often, participants in performance appraisal meetings seem awkward and uncomfortable. To some extent, that's unavoidable – it's always a bit awkward for one person to deliver a formal assessment of the quality of work performed by another.

But following some simple suggestions can eliminate a lot of the awkwardness in performance appraisal meetings. Here are a couple of tips that will help put both players at ease. (In Part 2 of this article, I'll provide some addition...

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Article Body:

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But following some simple suggestions can eliminate a lot of the awkwardness in performance appraisal meetings. Here are a couple of tips that will help put both players at ease. (In Part 2 of this article, I'll provide some additional suggestions.)

### Gather Your Appraisal Information and Materials in Advance

The most important item you need to have is a copy of the individual's performance appraisal. That's obvious. But that's not all.

At the beginning of the year you and the individual probably had a performance planning meeting. Ideally, the individual would have taken notes on a blank copy of the appraisal form and made a copy for you. That document should have all of the key items that you discussed during the meeting. Be sure you have a copy of that planning document in case a question about the original goals comes up.

You'll also need information about the individual's performance, particularly if there are some areas where the performance varied significantly from your expectations. Whether the variation was in a positive or negative direction, you'll need to be able to demonstrate why you assigned the rating that you did. If the assessment is that the individual's performance was less than you desired, then it's critically important that you have all of the evidence you used in order to come to that "Unsatisfactory" or "Need Improvement" performance appraisal rating. There's a magic phrase to use here. That phrase is, "For example . . ." Make sure you've got plenty of examples that support a less-than-satisfactory evaluation.

You may want to have a copy of the individual's development plan. You may want to have copies of weekly reports that the individual submitted that described progress against the goals that were set. You can't make a mistake by having too much support material. It will prevent the embarrassment of being unable to find anything of substance to justify the rating you gave.

#### Make a List

What are the key points that you want to cover during the discussion? In addition to having a copy of the performance appraisal, write down a list of the most important items you want to discuss. It's easy to refer to them during the meeting to make sure that everything that needs to be discussed gets covered.

#### Pick an Appropriate Place

Probably most performance appraisal discussions take place in the manager's office, with the manager behind the desk and the appraisee sitting directly in front of it.

Is that the best place to hold the discussion? It may well be, particularly if the performance appraisal is not very good and the manager wants to trot out all of the power and authority available to make the subordinate understand that immediate change is necessary. But too often the authoritarian, boss-behind-the-desk arrangement serves to emphasize the power relationship at a time when a more collegial approach might be more effective.

More important than the actual location where the discussion ends up taking place is the decision-making process the manager engages in to determine that location. Too often, managers conduct the performance appraisal discussion behind their desks by default — they haven't given any thought to the matter and just let it happen in the place where they are most comfortable.

There are several other alternatives possible. The manager's office might not

offer complete privacy, particularly if walls are thin or it's a cubicle arrangement. In this case a conference room or the temporarily vacant office of an out-of town senior manager might be pressed into service. If the performance appraisal contains good news and the two participants in the appraisal drama are old colleagues, it might best be conducted over a cup of coffee in the cafeteria. And if it is conducted in the manager's office, just a little furniture rearrangement might reduce the hierarchical nature of the discussion.

If the performance appraisal does indeed contain bad news, and particularly if the manager believes that it will take a dramatic gesture to bring home the message of "Change or else!", the appraiser's boss's office might be a good location. Having your boss give you your performance appraisal in her boss's office – with her boss sitting in as an observer / reinforcer – certainly communicates the seriousness of the message being delivered.

But beware the unusual location. The district sales manager who gives one of her sales reps his annual performance appraisal while the two of them are in the car, driving down the highway on route to a new prospect's office, is exercising bad judgment. So too is any manager who selects a location significantly away from a business setting, unless the necessity for conducting the performance review at that time, in that location, is obvious to both players.

These are some small suggestions that will help to reduce the awkwardness that always seems to surround the performance appraisal discussion. In Part 2, I'll provide a couple more tips that will help put both players at ease.