

Title:

Get Your Performance Appraisal Discussions Off to a Good Start

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Summary:

Here are four suggestions that will make the performance appraisal discussion more relaxed.

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In a previous article I shared a couple of tips that will reduce the feelings of discomfort that often come when a performance appraisal is discussed – gather your materials in advance, make a list of the key points you need to cover, and pick an appropriate place for the discussion. Here are four more suggestions that will make the performance appraisal discussion more relaxed.

Choose a Convenient Time

When is the best time to hold a performance appraisal discussion? There isn't any one particular time that is ideal – mornings or afternoons, early or late in the week, it doesn't matter.

What does matter is having enough time. Wise managers set a specific time for a performance review – perhaps 60 minutes – and announce at the beginning of the meeting just how long they have budgeted for the discussion. But they also make sure that the next activity scheduled for after the appraisal discussion is one that is either a low-priority (so that it can be re-scheduled) or highly flexible (like working on a long-range plan). It may turn out that more time is needed to discuss some sensitive items that arise during the discussion. It may also be that the performance appraisal discussion turns into a highly creative brain-storming session that needs to continue beyond the one-hour schedule. Make sure there's enough time for unexpected events to play out.

Determine the Agenda

How are you going to kick off the performance appraisal discussion? What are the first words you plan to say? Will you review the performance appraisal sheet

section by section, or do you want to start with the final rating and move backwards from there? When are you going to go over the employee's self-appraisal?

Too often these questions are answered simply as "it just happened that way" – the manager gave no thought to the sequence of events that he wanted to follow.

A better approach is to have an agenda for the meeting. The agenda need not be written down (although that's not a bad idea) but the manager needs to decide in advance how he wants to structure the discussion.

#### Arrange for Work Coverage

If you don't have someone to answer your phone and you can't switch the phone to send all calls directly into voicemail, then make a firm decision to simply ignore any phone calls that come in during the meeting. Steal a "Do Not Disturb" sign from the next hotel room you stay in and put it on the door handle of the room where you're meeting. Tell your staff and colleagues to follow the "thousand-mile rule" – don't disturb you with anything unless it's of the same urgency that they would track you down and interrupt you if you were a thousand miles away.

#### Give the Individual a Copy of the Performance Appraisal to Read in Advance of the Meeting

Before I became a consultant, I spent fifteen years working for three large corporations: General Electric, United Airlines, and PepsiCo. Each one of those companies had a rigorous performance appraisal system; every one of my bosses took the process seriously.

But each one followed the same clumsy procedure when the day came for my performance appraisal discussion. At the time we had set for the meeting I would walk into his office and he would hand me the appraisal. I would try to read through the multi-page document just as fast as I could while my boss sat behind his desk trying to gauge from my reactions how I was taking it.

What a bumbling way to start the meeting! How can an employee take everything in from 2 minutes of speed reading?

Here's a far better way to get the meeting off to an efficient, business-like start. An hour or two before the appraisal meeting is scheduled, give the employee the performance appraisal. Say, "Sam, at 3:00 this afternoon we're going to get together for your performance review. I'd like you to read through

the performance appraisal ahead of time so that you're prepared for our meeting. Feel free to write any questions you have directly on the form, or highlight anything that you want to be sure we talk about. See you then."

Sam now has some time to read carefully what you have written, at his own pace. He can reflect on the things you've said without having to immediately defend or explain himself. He can jot down notes and think of questions he'd like to ask.

If you ask people to complete a self-appraisal, ask for it at the same time that you give them a copy of their appraisal (if you haven't asked them to send it to you earlier so you can use it as an information-source in completing the official performance appraisal.) You too will be more relaxed and better prepared by being able to read, in an unpressured way, what the individual has written about herself.

One caution, however. If the person you're reviewing is a marginal performer with a bad rating, wait until the beginning of the meeting to hand over the performance appraisal. This increases your control of the situation.

Must performance appraisal discussions be uncomfortable exchanges? No. Following these small suggestions will help produce appraisal discussions that turn out to be productive learning events and true team-building experiences.