

This unit looks at a record of an annual performance appraisal, which is a scheduled evaluation of an employee's performance and progress.

**BEFORE YOU READ**

Discuss these questions.

- 1 What points might be discussed in a performance appraisal?
- 2 Some employees feel that performance appraisals are 'a waste of time'. How can they be made easier and more productive? What are the benefits of a well-handled appraisal?

**READING****A Understanding the main points**

The performance appraisal record on the opposite page was written by the manager who conducted the appraisal; it summarises the main points that he discussed with his employee. Read it and match the points (1–8) with the corresponding examples (a–h).

- |   |   |
|---|---|
| 1 One of Pilar's strengths                                    | a) Better service within stores   |
| 2 An achievement  | b) The provision of mentoring and a three-day workshop                        |
| 3 Her main objective during last year's performance appraisal | c) Scheduling of sessions with staff in stores across the region              |
| 4 Action taken to fulfil last year's objective                | d) Promotion to Regional Store Manager  |
| 5 Her challenge this year                                     | e) The ability to give good feedback  |
| 6 Action to be taken  | f) Promotion is conditional on improvement in performing administrative tasks |
| 7 Her career objectives                                       | g) Efficient use of time at the Heyworth Store                                |
| 8 Gary's recommendation                                       | h) Organised and efficient handling of financial figures and sales data       |

**B Understanding details**

Read the performance appraisal record again and say whether these statements are true (T) or false (F). Correct the false ones.

- 1 Pilar has increased the revenue of struggling stores.
- 2 She has improved staff morale and working practices within the stores.
- 3 Last year, some supervisors at the Heyworth store complained that their workload was too heavy.
- 4 Pilar has to travel a long way to get to the Heyworth store.
- 5 There has been a good response to the sessions she holds with staff.
- 6 Pilar took a long time to update financial figures as she was not comfortable handling numerical data.
- 7 Pilar does not want to be transferred to another region or abroad.
- 8 Due to her progress over the past year, she will be promoted.



## PERFORMANCE APPRAISAL

### Summary of discussion points

**Performance appraisal of:** Pilar García-Martínez  
**Position:** Assistant Regional Store Manager  
**Length of service:** 5 years

**Conducted by:** Gary Lynch  
**Date:** 16 December

The following points have been agreed:

#### 1) Capabilities and strengths

Pilar:

- has the ability to motivate and direct the work of her subordinates.
- is articulate and persuasive.
- delivers feedback clearly and constructively.
- is good at finding solutions to boost revenue, cut costs and enhance the image of struggling stores.
- has excellent judgement and acts quickly to prevent potential risks.

#### 2) Achievements

Pilar:

- has increased the sales of under-performing stores and identified opportunities for improving revenue, such as modified product lines, innovative marketing and merchandising, creative product displays and effective pricing strategies.
- has strengthened staff morale and adapted working practices so that the stores are operating to their optimum efficiency.
- has ensured an improvement in the level of service, as well as the overall presentation of the stores.
- takes pride in her role in establishing an efficient recruitment system.

#### 3) Fulfilment of last year's main objective(s)

During her last appraisal, Pilar expressed difficulty keeping track of supervisory activities in the Heyworth store. Furthermore, some supervisors there felt neglected and that adequate time was not taken to address important issues in the store.

Pilar was aware that she could not afford to spend more time at the Heyworth Store – only a few hours each quarter – due to the distance and time constraints. She agreed that she needed to make more efficient use of her limited time at the store. Since then, she has scheduled sessions in all stores within the region, which include reviews of work in progress, plans for upcoming work and

general guidance. She has also established a more comprehensive follow-up system so that she can monitor issues which have arisen at meetings.

There has been very positive feedback from many stores, including the Heyworth store, about the new system.

#### 4) Challenges / Areas to improve

Pilar undertakes various administrative tasks when the Regional Store Manager is absent, such as providing financial figures and sales data to head office when requested. On several occasions, it was noted that figures were not handled in an organised and efficient manner and there were some errors. She admitted that she lacked confidence with the new retail management database system (RMDS) and, as a result, found it time-consuming to update revenue and sales data.

#### 5) Action to be taken

Pilar will be provided with mentoring to refine her skills when handling data and using reporting systems. She must also attend a three-day workshop on the RMDS.

#### 6) Career objectives

Pilar has expressed a desire to be considered for the role of Regional Store Manager. She is prepared to transfer to another region or even abroad.

#### 7) Recommendations / Comments

Pilar continues to be a dedicated, high-performing employee who has progressed considerably this year, which means she could become a contender for promotion to regional store manager within the next year. This would depend on her ability to master the administrative tasks mentioned above, which will be reviewed in three months.

Due to her exceptional effort, our under-performing stores have exceeded their sales goals, so she will be awarded a bonus which reflects her achievement.

## VOCABULARY

**A** Word search

Find adjectives in the performance appraisal report which mean the same as the words and phrases in *italic*.

- 1 He is an excellent public speaker because he is *very clear and easy to understand*. (section 1)
- 2 She is very *convincing* when she needs to influence others. (section 1)
- 3 With the new system in place, the production team are operating to their *best level of efficiency*. (section 2)
- 4 His staff feel *abandoned and forgotten* because he focuses exclusively on his own goals rather than those of the team. (section 3)
- 5 He doesn't have *enough* experience to work outside his daily routine. (section 3)
- 6 Each manager needs to prepare his or her team members for the *approaching* performance appraisals. (section 3)
- 7 She is a *committed* member of staff who can be counted on to complete assignments. (section 7)
- 8 The new Managing Director requested an action plan for dealing with the *failing / ineffective* department. (section 7)

**B** Definitions

Match these words and phrases from the performance appraisal report (1–8) with their meanings (a–h).

- |                     |  |
|---------------------|--|
| 1 a subordinate     | a) the way products are shown in a store   |
| 2 a product display | b) a person who is in competition with others  |
| 3 a product line    | c) stock of one type of product in different sizes, styles, colours, etc.              |
| 4 merchandising     | d) a limit or restriction on the amount of time available                              |
| 5 time constraints  | e) to become proficient or skilled at a task   |
| 6 to keep track of  | f) a person in a lower rank or position  |
| 7 a contender       | g) the planning of sales by presenting a product to the right market at the right time |
| 8 to master         | h) to monitor or keep aware of something or someone                                    |

**C** Sentence completion

Use words or phrases from Exercise B in the correct form to complete these sentences.

- 1 Due to ....., we didn't manage to cover this item in the last seminar.
- 2 With his level of expertise and experience, he is a strong ..... for this job.
- 3 Participating in the training programme helped me to ..... data management.
- 4 The Marketing Manager needs to have greater confidence in her ..... so that she feels comfortable when delegating tasks to them.
- 5 When I was making frequent trips to our subsidiaries all over the world, it was not easy to ..... my team's progress.



**D Describing responses**

Use the words and phrases in the box to complete the sentences.

admitted that   aware that   encouraged   expected to   expressed a desire to  
expressed difficulty   feels   noted that   prepared to   proud of

- 1 He is ..... his ability to address emergencies in a calm manner.
- 2 She ..... take on more responsibility.
- 3 It was ..... she doesn't take action without direction.
- 4 She ..... she was easily distracted by non-work issues.
- 5 He is ..... his lack of organisation sometimes results in unnecessary delays.
- 6 He ..... giving feedback to his subordinates because he ..... that they are unresponsive and do not respect his authority.
- 7 We have greatly appreciated the fact that she is ..... offer some flexibility when it comes to working additional hours.
- 8 Over the next three months, he will be ..... deal more positively with criticism and respond more calmly and effectively in stressful situations.
- 9 He has been ..... to actively seek personal development opportunities during the next six months.

**E Scrambled words**

Unscramble the words in *italics* from the performance appraisal report which describe improvement.

- 1 We need to *stobo* revenue. (section 1)
- 2 Our marketing campaign will *hennace* the image of the company. (section 1)
- 3 The performance-related bonus will *trsgtnneeh* staff morale. (section 2)
- 4 She will undergo a mentoring programme to *frien* her soft skills. (section 5)
- 5 He has *sroseedrgp* in his ability to lead the team with authority. (section 7)

**OVER TO YOU**

- 1 Design a questionnaire which could have been used in Pilar's performance appraisal. Use a format that would elicit the information provided in her performance appraisal record. When you have finished, compare it with ones designed by other people in your class. Which do you think would be most effective? Why?
- 2 With a partner, act out Pilar's performance appraisal based on the information in the record on page 69.