

Introduction to Appraisal Reviews

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Learning outcomes:

- Define what is meant by an appraisal.
- Identify the benefits of conducting appraisals.

What you will need:

- Sticky notes (you will need to source these)
- Handout 1- Benefits of the appraisal review

Content and suggested timings:

What is an appraisal review?	20 minutes
Love it – hate it	20 minutes
Benefits	20 minutes
Total duration:	60 minutes

What is an appraisal review?

First of all, let's be clear what we are talking about. Appraisal reviews are sometimes also called performance reviews and are commonly confused with performance management, in fact there are many who will argue that they are one and the same.



Rather than join in this debate, the focus of this training is on the formal meetings you will have based around the appraisal, whereas performance management is about employees being managed on an on-going basis to achieve targets.

Managing poor performance should come under performance management and involve regular one to ones, short term targets, support, potentially formal warnings (and eventually dismissal) and so on, whereas appraisals should identify longer term targets, development needs and progression opportunities (covered in the Managing Performance Training Wizard).

The clue is in the title **APPRAISE**, which means to review; to consider what is working well, what isn't working well, what targets and improvements need to be made and (the nice bit!) praise when they have done a great job!

Employees should leave the review meeting clear about what is expected of them, challenged by the tasks ahead and feeling buoyant about the successes they have achieved (no matter how small they may seem). There should be no surprises in an appraisal review, don't save up

issues just because you are getting together! Appraisals should be an opportunity to sit down and formally discuss all the issues you have been talking to your employee about on an ongoing basis.

Every organisation will have different systems and processes, some electronic, some paper-based, they may be conducted annually, biannually, quarterly – there are no hard and fast rules for conducting appraisals but make sure the training you deliver reflects your process. Within the training the trainer can listen and take feedback, but it is not going to change **what it is** in the immediate future. The purpose of this training is to develop delegates' knowledge of your current appraisals system and ensure they know **how it works!**

Start a brief discussion about what employees (and delegates) think about the appraisal review. This is going to be covered in more detail later so you are looking for general responses, such as those below. Identify that not everyone has a positive perception of the process and, from their experiences ask them to identify why that might be.



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