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Reviewing and developing staff performance

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The focus of this session is on performance appraisal and career development

Session outline:

- Tips and guidelines for a successful appraisal process
- Helping you to prepare for and manage your individual appraisal conversations
- Career conversations and development

Why do appraisals?

- Appraisals drive performance and engagement
- Provide the opportunity to:
 - Assess and manage performance
 - Provide specific feedback to staff
 - Engage in career development discussions
- The appraisal conversation is a **retrospective** summary of performance and a **prospective** look towards the employee's ongoing performance and development

Appraisal benefits to the organisation

- Providing feedback to employees about their performance
- Allows performance to be linked to business objectives
- Setting and measuring goals
- Determining who gets promoted (in some instances)
- Encouraging performance improvement
- Motivating superior performance
- Counselling poor performers
- Encouraging coaching and mentoring
- Supporting manpower planning or succession planning
- Determining individual training and development needs
- Determining organisational training and development needs
- Confirming that good hiring decisions are being made
- Improving overall organisational performance

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Helpful guidelines for the appraisal process

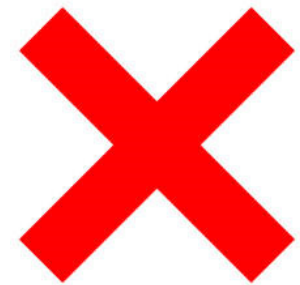
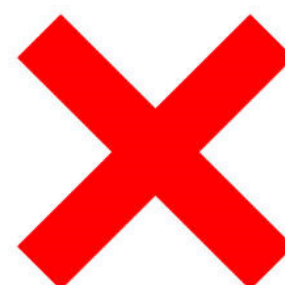
When done correctly, the appraisal process:

- Clarify expectations
- Set goals with your staff
- Provide guidance and feedback
- Develop skills and knowledge
- Advance career development
- Set a plan to manage any underperformance issues
- Motivate employees to fully engage with the business



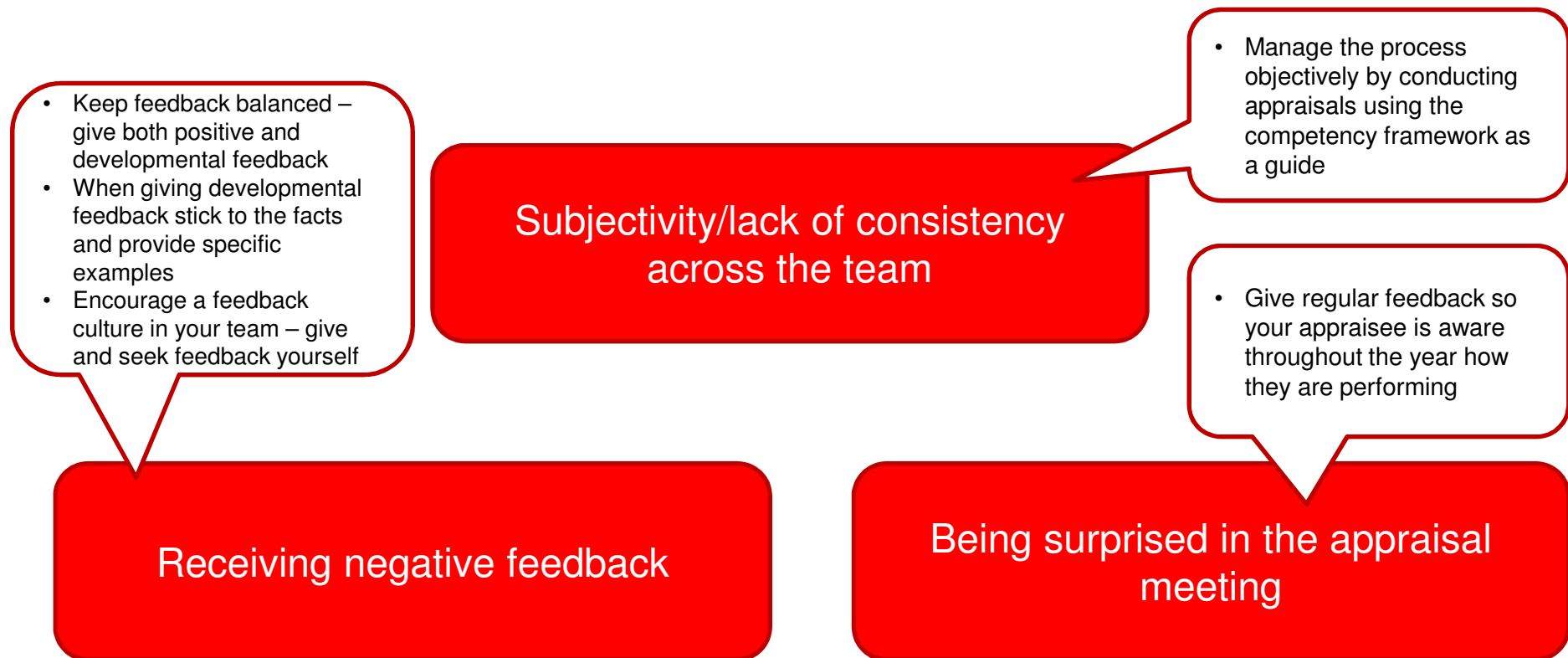
When done poorly, the appraisal process:

- Is a one-way lecture where the manager is doing all the talking with little or no input from the employee
- There is no focus on the development of the employee's skills and abilities, which suggest a lack of commitment from the organisation
- Employees can become disconnected and disillusioned about the work, team and organisation
- Employee may decide to leave the firm



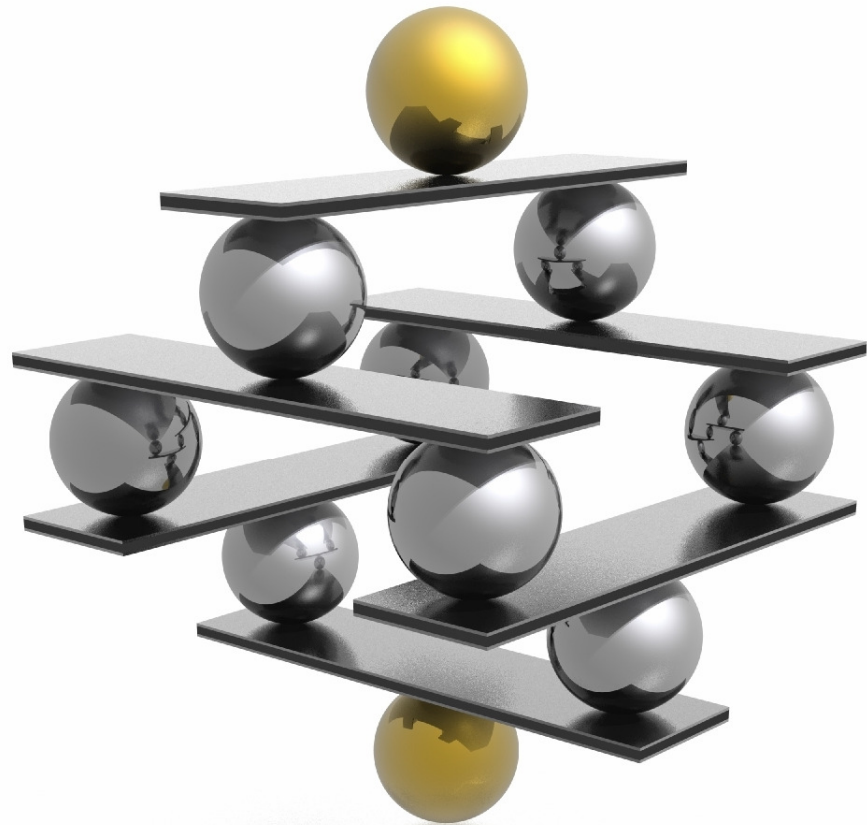
The appraisal meeting – appraisee fears

What fears may appraisees' have and how can you address them?



Feedback tips

- Feedback should be:
 - Balanced
 - Specific
 - Factual and descriptive
 - Constructive
 - Manageable
 - Accurate
 - Direct
 - Encouraging of self-assessment



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Helping you prepare and manage individual
appraisal conversations

Typical topics addressed during the appraisal are:

- **Technical and professional abilities** - the employee's level of expertise in performing the duties of the role
- **Leadership and management** - how people lead and manage the performance of others
- **Communication** – all forms of communication rely upon how well information, ideas and proposals are expressed
- **Task and work output** – in terms of timeliness and quality
- **Relationships** – how effectively a person works with others in the team and/or organisation, as well as external contacts
- **Management and development of self** – a person's ability for self-reflection and learning, stress management and attaining work-life balance
- **Client relationship management** – how effective a person is at interacting and engaging with the organisation's clients
- **Business development** – is the person actively engaged in any business development initiatives for the organisation

The process should identify work capabilities and required development

- What strengths does the person already have that they can build on to achieve the goals in their performance plan?
- What skills and capabilities are needed to successfully achieve work goals?
- Which capabilities will have the greatest impact on performance?
- What additional capabilities may they need to progress in their career?
- Are there any career-limiting factors that should be addressed?

Setting goals is critical to the success of this process

- It forces the identification of critical success factors in the job
- It mobilises individual and organisational energy
- It forces concentration on highest priority activities
- It increases probability of success
- It generates increases in productivity



Important to note about setting goals

Specific

Measurable

Achievable

Realistic

Time-related



During the appraisal conversation

- Keep the discussion on track
- Focus on positive possibilities
- Be clear about the expected level of performance or behaviour and identify what would meet the performance expectations?
- Establish achievable goals and timeframes
- Ensure there are sufficient coaching supports, resources and feedback
- Offer assistance, such as further training, mentoring, flexible work practices or redefining roles and expectations

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Conducting a career development conversation

Conducting a career development conversation



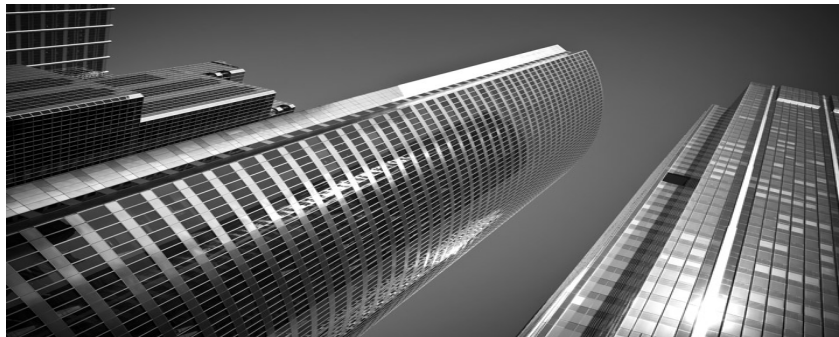
What is it?

- A career development conversation means talking to your staff about:
 - Career paths and the types of experience that will make them possible
 - Information on how the organisation/team views their potential (typically, staff value this type of information)

The benefits of career conversations

For the employee:

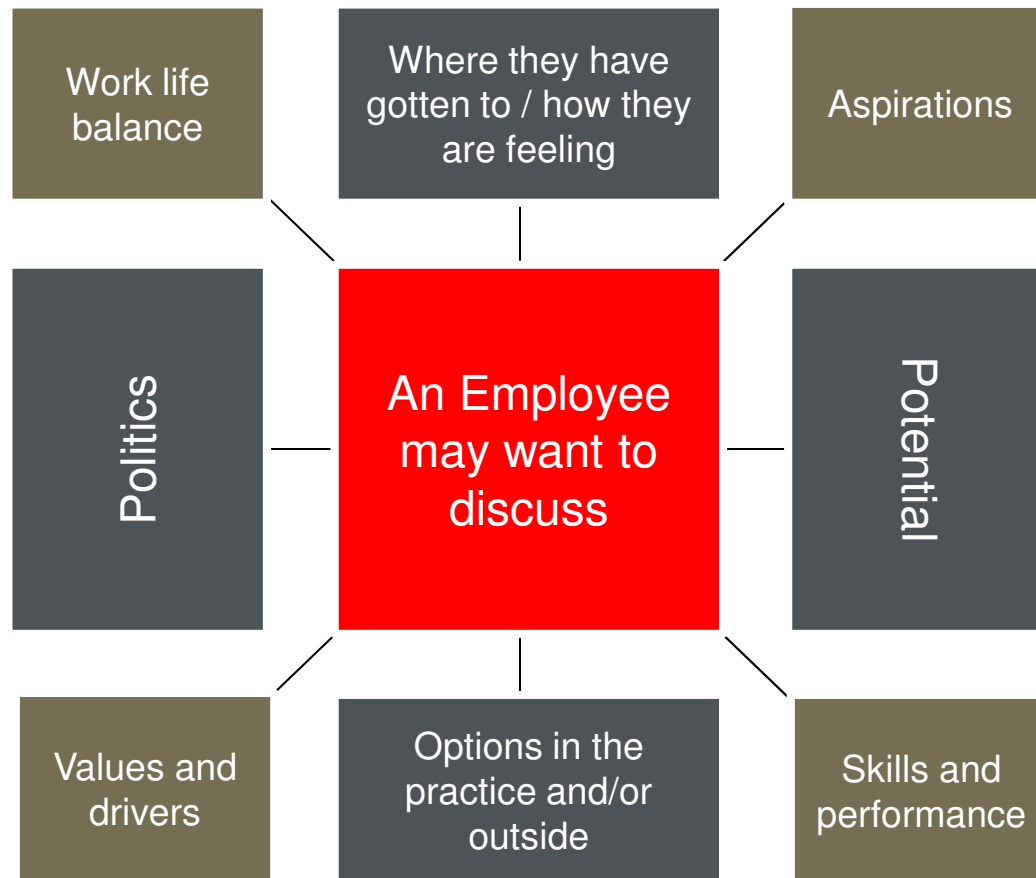
- Clear sense of direction
- Increased self-insight
- Broader understanding of career options
- Increased motivation and confidence



For the organisation:

- Attraction and retention
- Deployment of skills
- Improved performance
- Protection from the risk of claims

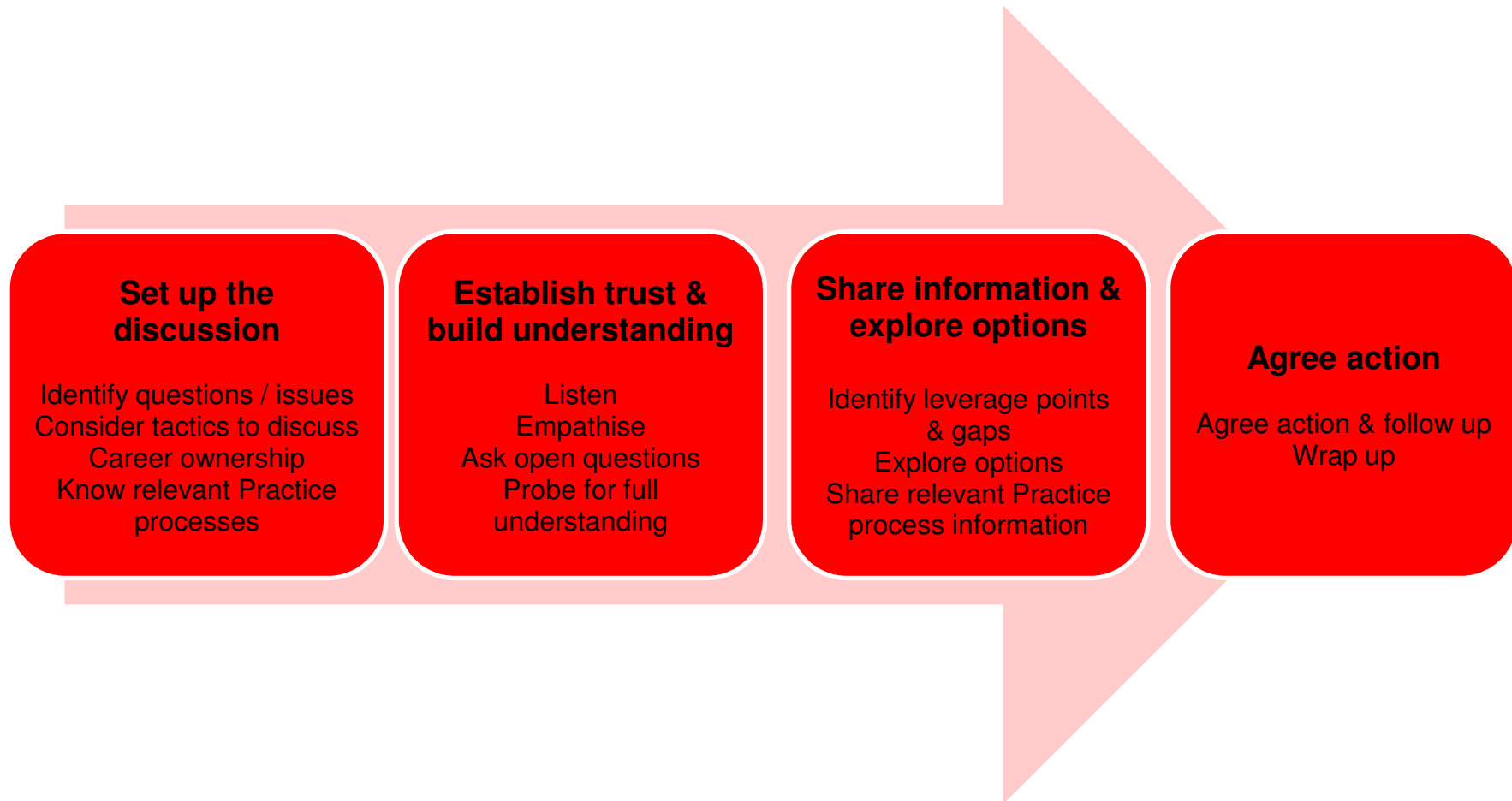
Elements of an effective career conversation



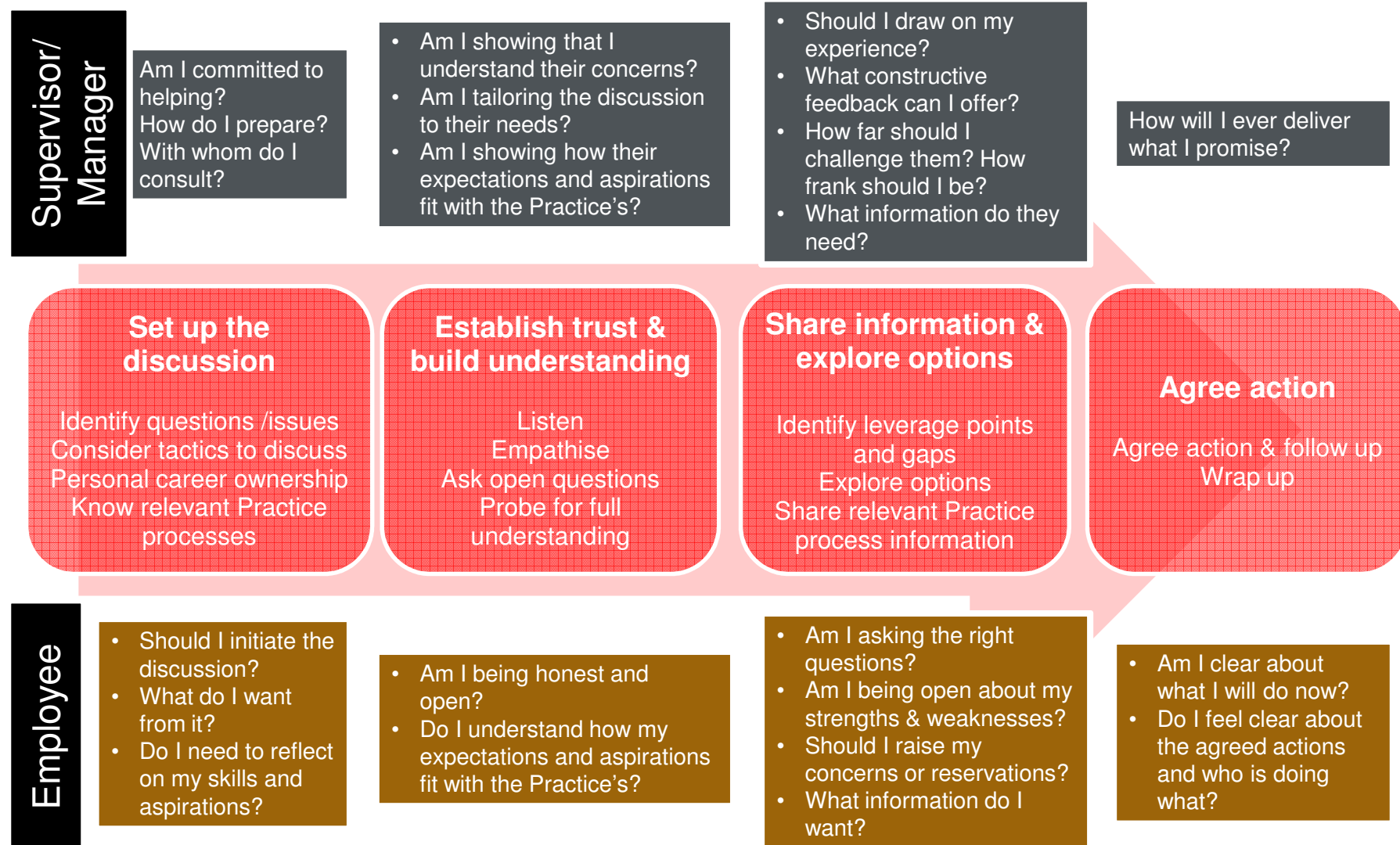
Take many forms

- Can be formal or informal
- Take place in many settings:
 - Appraisals
 - Performance reviews
 - Coaching or mentoring
- May be segmented (any element at any time)
- Take place over time

Model for an effective career discussion



Effective career discussion & questions



A career conversation – “question bank”

1. Where do you see yourself going in your career?
2. What motivates you to get there?
3. What do you enjoy most about your work?
4. What do you enjoy least?
5. How committed are you to the hard work and self-development required to make your goals happen?
6. What might get in your way?
7. What is the gap between where you are now and where you want to be? How do you think you should bridge the gap?
What do you need from me/us?

Planning for development should consider:

- The tasks of an employee's role
- The potential for an employee to work in different roles within the team or the wider organisation
- The capacity to work in new roles or careers
- The opportunity to leverage cross practice work/involvement
- Capacity for the employee to take on business development activities or other special projects

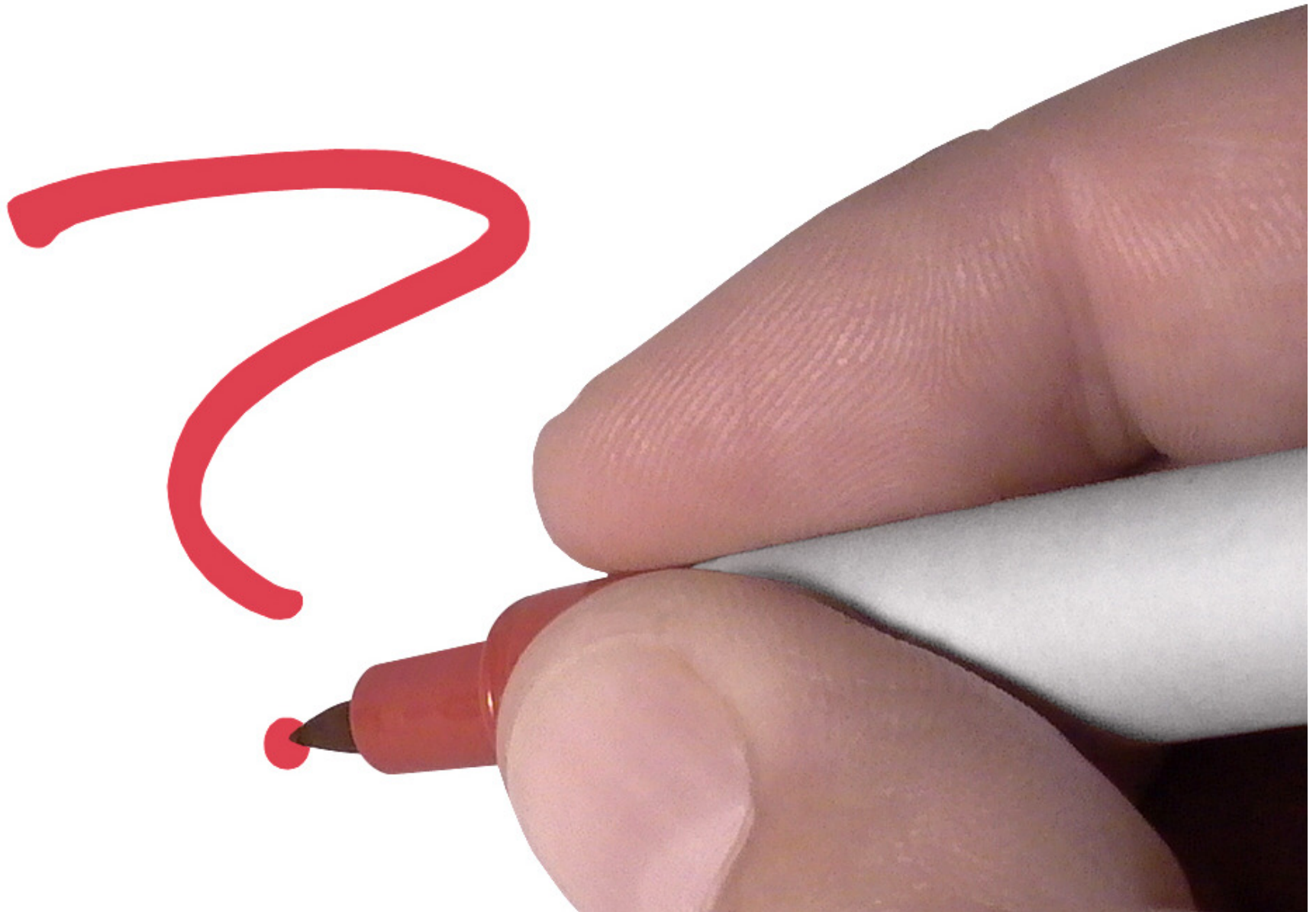
Your concerns about career conversations

Questions:

- What concerns do you have?
- How can they be mitigated?



Final questions and/or comments





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