

Formal Performance Appraisal Guidelines for Managers

Suggestions for Writing Effective Appraisals

Write descriptions of the employee's performance that support both your view of their good performance and your view of their performance that needs improving.

- Use action verbs to describe performance.
- Use pre-existing standards and job requirements.
- Include specific actions needed to reach the desired performance level.
- Focus on performance, not personalities.
- Examine valid, concrete issues, not subjective emotions or feelings
- Judge results achieved.

Using Effective Phrases for Performance Appraisals

- Start with a phrase that accurately describes the employee.
- Add the employee's name and substantiating information to the phrase.
 - Original Phrase: *demonstrates sound cost effectiveness*
 - Revised Phrase: Terry *demonstrates sound cost effectiveness* by achieving an 8% reduction in departmental expenses in 2007.
- Use the phrases as a base for describing areas that need improvement.
 - Original Phrase: *provides quick responses to customer complaints*
 - Revised Phrase: Justin could improve customer satisfaction ratings by *providing quicker response times to customer complaints*.
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Performance Appraisal Response Example

Susan has successfully updated the department website every Monday in 2007. Thanks to her efforts, client calls regarding status updates have decreased by 42% from the previous year.

Conducting the Appraisal Meeting

- Put the employee at ease.
- Show respect.
- Give honest feedback.
- Communicate that the appraisal process is a collaborative effort to help them in their job and for both of you to reach mutual goals.
- Give them an idea of what will happen over the time you spend on the appraisal: examining performance areas, recognize success, identify challenges and work together on mutual solutions and goals.
- Be sure to ask for the employee's input, challenges, ideas, solutions and goals.
 - Anticipate the areas the employee will want to discuss.
 - Have strategies and resources for helping them succeed.
 - Ask for the employees' reaction to the meeting. Share your reaction.
- Summarize the key areas discussed, the agreements to sustain good performance and to improve performance.
 - End with a sincere show of your gratitude for their contribution to your team.
 - Keep the appraisal on track. Avoid sidetracks.
- On each area of the appraisal form you have decided to discuss, cover their strengths first.

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- Ask directed questions that allow the employee to communicate openly and honestly. Listen more, talk less.
- Ask them if there are other areas they would like to talk about and successes they would like to share.
- Ask the employee how well they feel they have done and for their ideas on improving their performance.
- Use “I” language and speak in behavioral terms, describe what you observed and what you expect.
- Agree on a plan to improve each item.
- Relate to goals – short term and long term.
- Record your mutual decisions and set some follow up plans.

Questions to ask when doing your analysis:

- 1. What are my expectations of this employee?
- 2. Where is the employee’s performance now?
- 3. Where does the employee’s performance need to be?
- 4. How do we get to the desired performance level?
- 5. How has the employee progressed on the previous year’s goals?
- 6. How can I motivate this employee to want to work towards their goals? What’s in it for them?
- 7. How can I help them succeed?