

MANAGER'S GUIDE TO APPRAISAL IN 10 SIMPLE STEPS

1**REVIEW PERFORMANCE GOALS AND OBJECTIVES**

Reflect on progress against goals or objectives that were agreed at the start of the review period.

2**GATHER DATA AND EVIDENCE**

Gather relevant feedback from other people, analyse any performance metrics such as KPI's or project outcomes. Consider wider accomplishments, challenges, and issues faced.

3**REVIEW PREVIOUS APPRAISALS**

Review the employee's last appraisal and performance feedback to track improvements or any recurring issues. Consider how the individual has progressed.

4**EVALUATE COMPETENCIES AND SKILLS**

Consider the employee's skills and behaviours in relation to the demands of the role.

5**PREPARE BALANCED FEEDBACK**

Aim for a balanced approach, recognising achievements and discussing areas for improvement. Make sure that comments are specific and actionable; with concrete steps for improvement.

6**IDENTIFY DEVELOPMENT OPPORTUNITIES**

Consider the employee's aspirations and discuss how they might meet these, for example through training, coaching or mentorship opportunities.

7**MANAGE THE DISCUSSION POSITIVELY**

Plan for the conversation to be constructive, clear and supportive. Prepare questions and allow the employee to share their perspective. It is their appraisal!

8**ALIGN APPRAISAL WITH COMPENSATION DECISIONS**

If appraisals are tied to compensation then be prepared for an honest conversation around salary and bonuses in line with your internal processes. Don't overpromise on things that are out of your control.

9**SCHEDULE THE MEETING**

Allocate enough time for meaningful conversations, and ensure that the meeting is held in a comfortable, private setting where the employee can feel at ease.

10**MAKE IT A POSITIVE EXPERIENCE**

Be prepared to consider the individual's viewpoint. Show you value their potentially different opinions. Make the meetings engaging and ensure the individual leaves feeling valued.