

PERFORMANCE REVIEWS

WORKSHOP GUIDE



CONTENTS

LEARNING OBJECTIVES	3
FEATURED VIDEOS	3
VIDEO 1 – PREPARING FOR A REVIEW	4
VIDEO 2 – MAKING A PERFORMANCE DIAGNOSIS	5
VIDEO 3 – BEYOND THE REVIEW MEETING	6
PERFORMANCE REVIEWS – ACTION PLAN	7

LEARNING OBJECTIVES

In this course you'll learn how to run better performance reviews.

This guide is designed for a manager or a facilitator to deliver a short workshop featuring videos from the Video Arts Management Essentials Series. Each video comes with a series of activities around the following structure:

LOOK - watch the video and reflect on the content and message.

THINK - activities and questions linking the video to their own experience and workplace.

REMEMBER - a summary of the key learning points.

Each section relating to the video will last around 15 minutes.

ACTION PLAN - At the end of the series of videos and activities delegates should be encouraged to share the most important actions they will take and record actions on their Personal Action Plan sheet.

FEATURED VIDEOS

- Preparing for a review
- Making a performance diagnosis
- Beyond the review meeting

VIDEO 1 – PREPARING FOR A REVIEW

LOOK (play video, 3 minutes)

Performance reviews help employees by clarifying: what they're doing well, what they're supposed to be doing and identifying the support they need. Sadly, performance reviews often go wrong because managers fail to prepare and don't know the facts.

THINK (10 minutes discussion)

How do you prepare to give a performance review?

Draw out the following points at the end of the session;

- You need a clear understanding of the individual's tasks and responsibilities. Make sure you've read the job description.
- Research in advance what the individual's achievements have been in the time since their last review.
- It can also help to read their personal file, go over notes from the previous review and update discussions, which have been held at agreed intervals throughout the review period.
- It's not just what you are going to say that needs careful thought. Prepare properly by giving adequate notice, preventing interruptions, arranging a suitable location and so on.

REMEMBER (2 minutes recap)

- Preparation: Review the notes in advance.

VIDEO 2 – MAKING A PERFORMANCE DIAGNOSIS

LOOK (play video, 3 minutes)

Performance review is a two-way process. However, managers often use reviews as an opportunity to focus on the negative and don't give individuals a chance to have their say or listen to them when they do manage to get a word in.

THINK (10 minutes discussion)

It's human nature to make assumptions and this can easily cloud our view of others. How do you keep the performance review strictly professional?

Responses should include;

- **Listen to the evidence**

Managers often have what they want to say, and hear, mapped out. Be prepared to listen.

- **Discuss facts not opinions**

Don't base criticism on vague opinions. Criticism must be based on facts (what happened and what was done). This will lead to constructive changes in behaviour in the future. The same rule applies to praise. Being told specifically what they have done well will remove any doubt in the individual's mind about whether the praise is genuine or not.

- **Discuss performance not personality**

Attacking an individual's personality is not the way to conduct a performance review – you are there to discuss performance, not personality. Concentrate on what's been done well. This motivates people. Discussing how they may tackle things differently in future helps them to develop and improve.

REMEMBER (2 minutes recap)

The diagnosis

- Listen to evidence and agree a plan.
- Face up to problems.

VIDEO 3 – BEYOND THE REVIEW MEETING

LOOK (play video, 3 minutes)

It's important that managers and employees agree an action plan for the next review period. Sadly, many managers miss this step out thinking that everything that needed to be said has already been covered. But missing out this vital step can leave employees feeling less valued within the organisation.

THINK (10 minutes discussion)

What methods do you use to record and chart the progress of an agreed action plan?

Responses could include;

- A plan of action must be agreed with the person being appraised.
- The plan must be about performance.
- It should be challenging, but realistic.
- The better defined the objectives are, the more likely they are to be achieved.
- And responsibility for achieving the plan should be shared between the employee and you, the manager.

REMEMBER (2 minutes recap)

Recap and plan:

- Agree a plan of action.
- Set a review date.

PERFORMANCE REVIEWS – ACTION PLAN

Divide the group into pairs or threes.

- Ask them to spend 10 minutes sharing the most important action they will take to improve their approach to performance reviews.
- Make sure that each individual has identified at least one specific action to take as a result of the programme.
- Ask for and answer any final questions.
- Bring the session to an end.