Greetings! The appraisal meeting planner worksheets are designed to print out as the cover sheet of a Performance.net appraisal, providing the manager with “Just-in-Time” coaching. The following pages are sample worksheets. The content is customized for each client according to their own ratings and procedures.

The worksheet contains rating-specific meeting goals and tips (i.e. questions to ask an “Outstanding” employee to promote engagement and retention). The purpose is to provide the manager with an opportunity to plan the appraisal meeting with specific strategic outcomes in mind.

This is part of a series of TipShare items that Performance.net sends to newsletter subscribers and makes available on our website. Our research included the book “Love ‘Em or Lose ‘Em” by Beverly Kaye and Sharon Jordan-Evans.

We hope you benefit from the TipShare program. You are free to use all TipShare items in any way. You can find a complete list at www.performance.net/HRresources.cfm. We would love to hear back from you about how you have used them so that we can pass on your knowledge in a future “TipShare”.

Best wishes,

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Rating: Outstanding

It takes a strong manager to support an outstanding performer. Congratulations on your own management work. Plan to gather information from this person and tell them you will have a follow-up meeting. Meet with HR to discuss your findings. Our goals for someone who is rated “Outstanding” are:

- **Engagement and retention:** Ask directly about their feelings about their job and the company, i.e. “What do you like best about your job?” “If you could get rid of one thing that is part of your job, what would it be?” “If you could change something about this company, what would it be?”
- **Utilizing their talents in mutually rewarding ways:** Discuss their potential for growth and leadership: “What would you like to be doing in 2 years?” “What would you like to learn about?” “What are your most important values: creativity, home/work balance, collaboration, independence, order, expertise, fun, learning, location, leadership, security, teaching?” “Does this position use your strengths?”
- **Development:** Recognize that even if there is no immediate upward opening, they could develop and affirm their values in many ways, including taking on cross-functional projects or a project or task of yours that would challenge them and lighten your load, and/or being assigned a mentor who is more senior in the company.
- **Recognition:** Ask them: “What is the most meaningful kind of non-monetary recognition for you?”

HR has a new follow-up process for high performers. After your meeting, contact HR to discuss your findings and plan how to optimize this person's satisfaction, performance and growth.

**Standard meeting steps:**

- Come to the meeting with 2 copies of the appraisal.
- Start with a positive statement.
- Ask how the employee feels they have done this past year.
- Get to the "Bottom Line", the overall rating, early in the meeting.
- Share your ratings and comments, and ask questions as you go.
- Listen. It's easy to jump ahead in your thoughts and miss opportunities to respond to something important. Use the "key word" method to get important information, i.e. the employee says: “I found working with him to be challenging.” You could ask: “In what ways was it challenging?”
- Close by summarizing the next actions to take, including the online signoff process, and the ongoing goal management process.

Use the notes section below to plan some key questions and thoughts.

**Notes:**
Rating: Exceeds Expectations

It takes a strong manager to support a great performer. Congratulations on your own management work. Our goals for someone who is rated “Exceeds Expectations” are:

- Engagement and retention: Ask directly about their feelings about their job and the company: “What do you like best about your job?” “If you could get rid of one thing that is part of your job, what would it be?” “If you could change something about this company, what would it be?”
- Utilizing their talents in mutually rewarding ways: Discuss their potential for growth and leadership: “What would you like to be doing in 2 years?” “What would you like to learn about?” “What are your most important values: creativity, home/work balance, collaboration, independence, order, expertise, fun, learning, location, leadership, security, teaching?” “Does this position use your strengths?”
- Development: Recognize that even if there is no immediate upward opening, they could develop and affirm their values in many ways, including taking on cross-functional projects or a project or task of yours that would challenge them and lighten your load, and/or being assigned a mentor who is more senior in the company.
- Recognition: Ask them: “What is the most meaningful kind of non-monetary recognition for you?”

HR has a new follow-up process for higher performers. After the employee signs off, HR will contact you to discuss your thoughts and support plans.

Standard meeting steps:

- Come to the meeting with 2 copies of the appraisal.
- Start with a positive.
- Ask how the employee feels they have done this past year.
- Get to the “Bottom Line”, the overall rating, early in the meeting.
- Share your ratings and comments, and ask questions as you go.
- Listen. It's easy to jump ahead in your thoughts and miss opportunities to respond to something important. Use the “key word” method to get important information, i.e. the employee says: “I found working with him to be challenging.” You could ask: “In what ways was it challenging?”
- Describe behaviors and specific actions to praise and to highlight learning opportunities.
- Close by summarizing the next actions to take, including the online signoff process, and the ongoing goal management process.

Use the notes section below to plan some key questions and thoughts.

Notes:
Performance Appraisal Meeting Planner
Team Member: Sally Walters
Manager: Betsy Mielnicki

Rating: Meets Requirements

It takes a good manager to support a good performer. Congratulations on your own management work. Our goals for someone who is rated “Meets Expectations” are:

- **Engagement and retention:** Ask directly about their feelings about their job and the company: “What do you like best about your job?” “If you could get rid of one thing that is part of your job, what would it be?” “If you could change something about this company, what would it be?”
- **Utilizing their talents in mutually rewarding ways:** “What would you like to be doing in 2 years?” Recognize that they might be happy right where they are. “What would you like to learn about?” “What are your most important values: creativity, home/work balance, collaboration, independence, order, expertise, fun, learning, location, leadership, security, teaching?” “Does this position use your strengths?”
- **Development:** Consider upcoming goals, aligned with corporate goals. What development opportunities will support their future work?
- **Recognition:** Ask them: “What is the most meaningful kind of non-monetary recognition for you?”

Standard meeting steps:

- Come to the meeting with 2 copies of the appraisal.
- Start with a positive.
- Ask how the employee feels they have done this past year.
- Get to the “Bottom Line”, the overall rating, early in the meeting.
- Share your ratings and comments, and ask questions as you go.
- Listen. It's easy to jump ahead in your thoughts and miss opportunities to respond to something important. Use the “key word” method to get important information, i.e. the employee says: “I found working with him to be challenging.” You could ask: “In what ways was it challenging?”
- Maintain a calm, positive tone of voice.
- Describe behaviors and specific actions.
- If improvement is needed, give the employee ownership by asking “How could you do [this task] better?”
- Close by summarizing the next actions to take, including the online signoff process, and the ongoing goal management process.

Use the notes section below to plan some key questions and thoughts.

**Notes:**
Rating: Needs Improvement

Use this planner to create a meeting agenda that will support a positive outcome. Our goals for someone who is rated “Needs Improvement” are to:

- Ask questions that help you both understand the root cause of this performance level. Are there outside factors causing issues, or internal needs not being met, i.e. lack of training, equipment or direction?
- Explore their fit for the position: “What are your most important values: creativity, home/work balance, collaboration, independence, order, expertise, fun, learning, location, leadership, security, teaching?” “Does this position use your strengths?”
- Establish a plan for improvement.
- Ensure that the needed outcomes in behavior and results are clear. Describe outcomes that are behaviors that can be observed and results that can be measured, and agreed-upon.
- Clearly communicate what will occur if improvement is not observed.

Standard meeting steps:

- Come to the meeting with 2 copies of the appraisal.
- Start with a positive.
- Ask how the employee feels they have done this past year.
- Get to the “Bottom Line”, the overall rating, early in the meeting. Follow up with “We are going to look at all of this together to discuss what needs to improve and how I can help.”
- Share your ratings and comments, and ask questions as you go.
- Listen. It’s easy to jump ahead in your thoughts and miss opportunities to respond to something important. Use the “key word” method to get important information, i.e. the employee says: “I found working with him to be difficult.” You could ask: “In what ways was it difficult?”
- Maintain a calm, positive tone of voice.
- Describe behaviors and specific actions.
- Where improvement is needed, give the employee ownership by asking “How could you do [this task] better?”
- Close by summarizing the next actions to take, including the online signoff process, the ongoing goal management process, steps that must be taken to improve and what will happen if improvement is not observed.

Use the notes section below to plan some key questions and thoughts.

Notes:
Rating: Needs Major Improvement

It is required that you review this appraisal with HR before meeting with this employee.

Use this planner to create a meeting agenda that will support a positive outcome. Our goals for someone who needs major improvement are to:

- Ask questions that help you both understand the root cause of this performance level. Are there outside factors causing issues, or internal needs not being met, i.e. lack of training, equipment or direction?
- Explore their fit for the position: “What are your most important values: creativity, home/work balance, collaboration, independence, order, expertise, fun, learning, location, leadership, security, teaching?” “Does this position use your strengths?”
- When you describe areas that need improvement, talk about behaviors and results, not motive or personality.
- Establish a plan for improvement with short-term milestones.
- Ensure that the needed outcomes are clear. Describe outcomes that are behaviors that can be observed and results that can be measured.
- Clearly communicate what will occur if improvement is not observed within the given time frame.

Standard meeting steps:

- Come to the meeting with 2 copies of the appraisal.
- Ask how the employee feels they have done this past year.
- Get to the "Bottom Line", the overall rating, early in the meeting. Follow up with “We are going to look at all of this together to discuss what needs to improve and how I can help.”
- Share your ratings and comments, and ask questions as you go.
- Listen. It's easy to jump ahead in your thoughts and miss opportunities to respond to something important. Use the “key word” method to get important information, i.e. the employee says: “I found working with him to be difficult.” You could ask: “In what ways was it difficult?”
- Maintain a calm tone of voice. If the discussion gets too emotional, take a break.
- Describe behaviors and specific actions.
- Where improvement is needed, give the employee ownership by asking "How can you do [this task] better?"
- Close by summarizing the next actions to take, including the online signoff process, the ongoing goal management process, steps that must be taken to improve, time frames, and what will happen if improvement is not observed.

Use the notes section below to plan some key questions and thoughts. Plan your desired outcome, which may include specific behavior changes, time frames and a deadline for dismissal if improvement is not observed.

Notes: