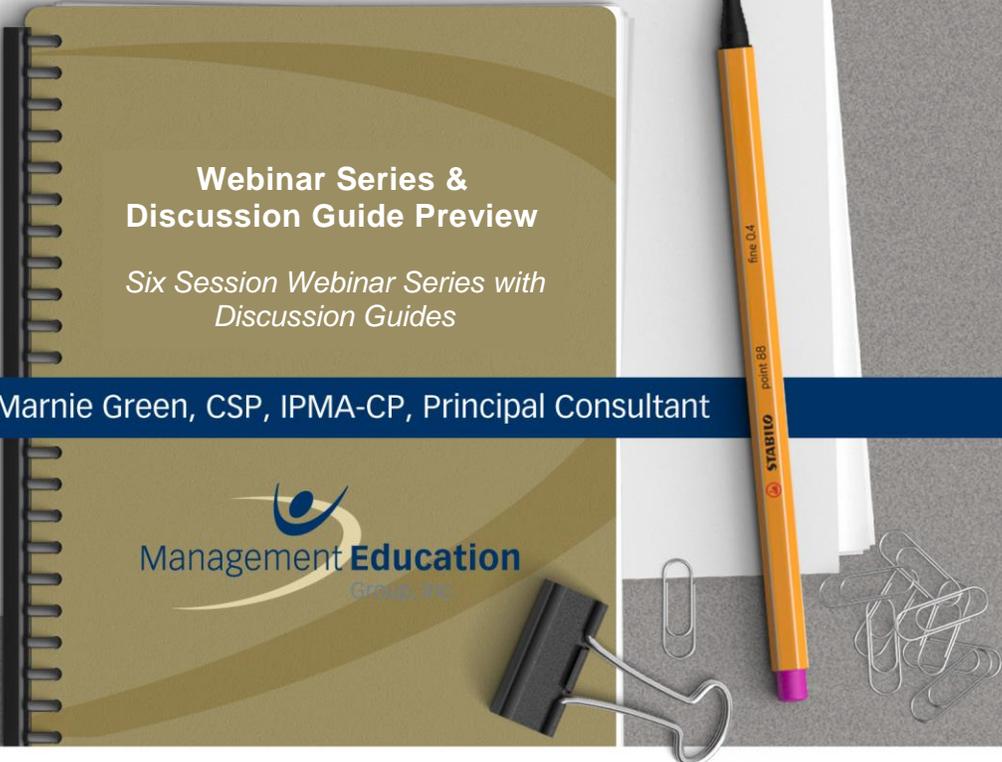


Painless

PERFORMANCE EVALUATIONS

A Practical Approach to Managing
Day-to-Day Employee Performance



**Webinar Series &
Discussion Guide Preview**

*Six Session Webinar Series with
Discussion Guides*

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Webinar 1 & Discussion Guide:

Can Employee Performance Management Really be Painless?

Webinar Overview

The *Can Employee Performance Management Really be Painless?* webinar reviews the concept of performance management, why it is important and why so few managers consistently do it well. The following topics are covered during this webinar:

- Performance management expectations defined
- Performance management avoidance
- The Painless Performance Management cycle
- Performance management trends

Reading Assignment

This webinar refers to Chapters 1 & 2 (pages 1 - 23) in *Painless Performance Evaluations: A Practical Approach to Managing Day-to-Day Employee Performance*.

Webinar 2 & Discussion Guide:

Getting Clear: Establishing Performance Expectations for Employees

Webinar Overview

The *Getting Clear: Establishing Performance Expectations for Employees* webinar reviews the number one key to your success as a manager – being clear with your expectations. The following topics are covered during this webinar:

- Employee performance vs. pet peeves
- Being clear with employee expectations
- Using SMAART goals
- Involving employees in goal setting

Reading Assignment

This webinar refers to Chapters 3 & 6 (pages 25 – 41; 63 – 74) in *Painless Performance Evaluations: A Practical Approach to Managing Day-to-Day Employee Performance*.

Webinar 3 & Discussion Guide:

Painless Performance Documentation: Elements & Techniques

Webinar Overview

The *Painless Performance Documentation: Elements & Techniques* webinar reviews the importance of maintaining quality and consistent documentation throughout the year. The following topics are covered during this webinar:

- Elements of effective documentation
- Effective documentation examples
- Developing a documentation routine
- Tools for effective documentation

Reading Assignment

This webinar refers to Chapters 4 & 10 (pages 43 – 54; 117 – 125) in *Painless Performance Evaluations: A Practical Approach to Managing Day-to-Day Employee Performance*.

Webinar 4 & Discussion Guide:

Being the Judge: Rating Employee Performance Accurately and Painlessly

Webinar Overview

The *Being the Judge: Rating Employee Performance Accurately and Painlessly* webinar reviews the importance of maintaining quality and consistent documentation throughout the year. The following topics are covered during this webinar:

- The rating scale purpose
- Rating scale assumptions
- Defensible ratings

Reading Assignment

This webinar refers to Chapter 7 (pages 75 – 84) in *Painless Performance Evaluations: A Practical Approach to Managing Day-to-Day Employee Performance*.

Webinar 5 & Discussion Guide:

Putting it in Writing: How to Painlessly Document A Performance Evaluation

Webinar Overview

The *Putting it in Writing: How to Painlessly Document A Performance Evaluation* webinar reviews the importance of writing meaningful comments on a performance evaluation. The following topics are covered during this webinar:

- Using existing documentation
- Enlisting the employee's help
- Writing effective performance evaluation comments

Reading Assignment

This webinar refers to Chapter 8 (pages 85 – 102) in *Painless Performance Evaluations: A Practical Approach to Managing Day-to-Day Employee Performance*.

Webinar 6 & Discussion Guide:

Leading a Painless Performance Evaluation Meeting

Webinar Overview

The *Leading a Painless Performance Evaluation Meeting* webinar brings together all the preparation steps and reviews how to effectively conduct the Painless Performance Evaluation meeting. The following topics are covered during this webinar:

- Meeting preparation and setting the tone
- Using questions effectively
- Meeting agenda
- A conversation framework

Reading Assignment

This webinar refers to Chapter 9 (pages 103 – 116) in *Painless Performance Evaluations: A Practical Approach to Managing Day-to-Day Employee Performance*.

Discussion Guide Purpose

The purpose of the discussion guides is to provide you with effective questions and activities, in a structured format, for use with groups of participants who have recently viewed the *Painless Performance Evaluations* webinars. These guides are flexible and provide suggestions for use; you can modify the questions and activities to meet your audience needs by incorporating specific organizational goals and examples.

Discussion Guide Overview

The discussion guides are broken into several sections to cover the main webinar topics. Within each section, icons may be listed to guide you:



This icon is listed next to specific **review points** covered in the webinar. Review this content with participants as needed before generating discussions or completing activities.



This icon denotes **knowledge check** or **discussion questions** to ask participants.



This icon is listed next to **participant activity overviews and instructions**. Make sure to review the activity instructions with participants prior to conducting.

The next two pages will provide you with a sample page from the third and fourth *Painless Performance Evaluations* Webinar Discussion Guides.

Effective Documentation Examples



Activity: Effective Documentation Challenge

1. Direct participants to work in pairs or individually.
2. Read the case study* below out loud.
3. Ask participants individually or in pairs to write 2 – 3 sentences that could be used as documentation of the situation.
4. Ask for volunteers to share the documentation examples they wrote.
5. As you review participant documentation examples, discuss the rules reviewed during the last section to ensure all necessary elements are included.

*Case Study Scenario

Your employee Justin has been repeatedly late for work the last few months. Sometimes he is late up to three times in a week. You had a conversation with Justin when you first noticed the issue, and Justin apologized and said he wouldn't let it happen again.

After the initial conversation you noticed Justin made an effort to clock in on time. Before long, he was back to being late by 5 – 15 minutes on most days. When you initiate the next conversation with Justin, he tells you he doesn't think it is necessary to have three people working the customer service desk at 8:00am each day because it doesn't get busy until 8:30am. The other two employees are rarely late, so Justin feels there is adequate coverage if he is running late.

You were clear with Justin that he is scheduled to begin at 8:00am. You expect him to be clocked in and ready to work regardless of how many other people are scheduled at the same time.



Activity Debrief Question

- Q:** What essential elements did you include in the documentation?
- Q:** How did you phrase the documentation to ensure it is an accurate reflection of the facts?

Defensible Ratings



Key Points

On rare occasions an employee may choose to dispute or challenge a performance rating. In most organizations, such ratings are not part of the formal appeal process, and employees are encouraged to express their views about the rating in the comments section or on an attachment to the evaluation. Some organizations have an appeal process in place for addressing disagreements about performance ratings. Whatever process your organization follows, remembering two things will keep you out of hot water when rating performance:

1. The focus of the evaluation must be job-related.
2. The more specific facts you include in the evaluation, the easier it will be to support the ratings.

If you include only job-related examples of performance, your ratings will be justifiable and substantiated. If you are vague and judgmental in your assessment, you are opening yourself up to challenge.



Discussion Generating Questions

- Q:** Think about past performance evaluations you have prepared. Did you focus on job-related, specific facts? Did you mention things that were not specific or clearly defined?
- Q:** In any of the past performance evaluations you prepared, did you ever struggle to support the ratings? How? What was the outcome?



Activity: Defensible Rating Practice

1. Add the following statements to flip chart paper or a whiteboard for all to view:
 - *Scott did a great job with the Nelson project.*
 - *Jessica displayed a very strong work ethic.*
 - *Jackson saved the organization money.*
 - *Cindy did not complete enough files this year.*
 - *Lois met expectations on the water conservation project.*
2. Ask participants to re-write each of these statements adding in more specific facts so the statements become more strongly supported.
3. Ask for volunteers to share their examples with the group.