Instructor's Guide

Light The Fire

Leveraging Appraisals for Maximum Performance

EDGETraining

systems inc.

By Tony Iyoob

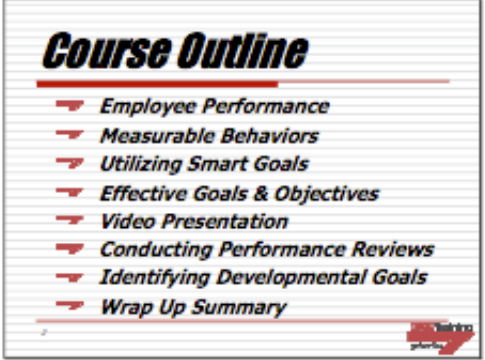Copyright © 2007, Edge Training Systems, Inc.
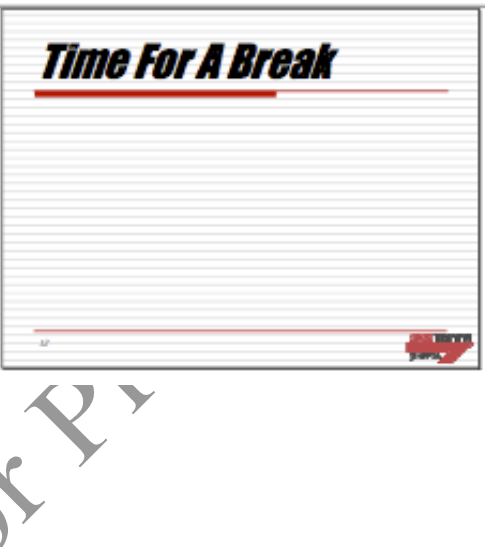
Light The Fire
Leveraging Appraisals For Maximum Performance
Instructor's Guide

Purpose: This course is designed to help participants investigate systematic and structured processes that lead to improved performance and measurable achievements of goals & objective that are aligned with the company as a whole.

Audience: This class is designed for employees at all levels of development.

Class Size: Approximately 12 to 34 participants.

Workshop Timeline: The above Gantt chart shows a visual of the class timeline. Blue bars represent lecture. Red bars represent group activities or interaction, and Magenta bars represent the video component.

Materials/ Equipment: The following materials are recommended for this course:
- Video: Edge Light The Fire
- Flipchart stand and paper or dry erase board
- Notepaper
- Tent cards or name tags
- Edge Light The Fire Workbook, PowerPoint & Projector

Organization: The Leader's Guide is designed to be used with the supporting Participant Course Book and the video titled Light The Fire. Leader's notes are to the right of the corresponding slide.

Duration: 2 to 4 hours.

Summary: The activities in this Course Book are designed to allow the instructor to tailor the curriculum to fit specific class needs. Some activities may be altered or omitted. Depending on time allotment and participant needs, instructors may wish to omit certain activities. Additionally certain activities can be expanded to include individual, partner, small group or whole class options.

Slide 1	**Performance Management** **Light The Fire** **Leveraging Appraisals** **For Maximum Performance**	Welcome the group to Light The Fire: Leveraging Appraisals For Maximum Performance. Have participants sign in using the edge workshop sign in form. 2 Minutes Opening Slide
Slide 2	**Course Outline** ⇁ *Employee Performance* ⇁ *Measurable Behaviors* ⇁ *Utilizing Smart Goals* ⇁ *Effective Goals & Objectives* ⇁ *Video Presentation* ⇁ *Conducting Performance Reviews* ⇁ *Identifying Developmental Goals* ⇁ *Wrap Up Summary*	Cover Course Outline 2 Minutes Page #1
Slide 3	**Course Objectives** *After This Session, You Will Be Able To...* ⇁ *Effectively Create Measurable Goals* ⇁ *Identify Measurements To Achieve Results* ⇁ *Conduct Proper Performance Reviews* ⇁ *Create Effective Action Plans* ⇁ *Take Action To Accomplish Goals*	Discuss the course objectives 2 Minutes Page #2
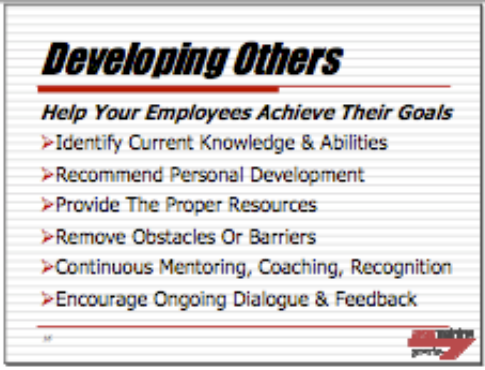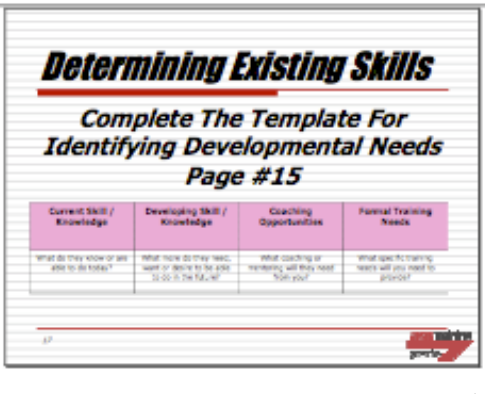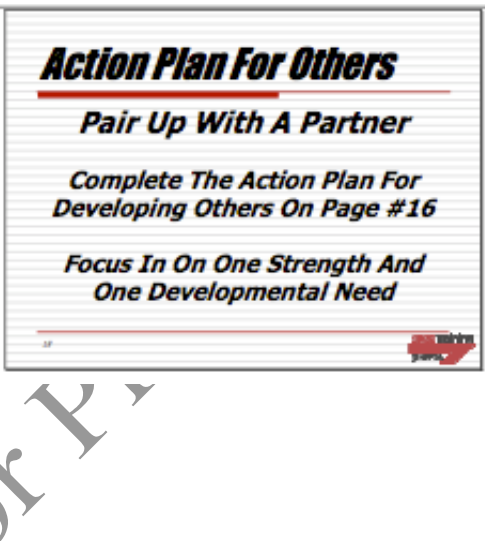
Slide 4		Throw this question out to the group, after responses from the group, show the slide and explain in detail the reasons we as managers need to appraise performance. Page #3 5 Minutes
Slide 5		Why don't associates do what they are supposed to do? List responses from the group on a flip chart accepting them all and then revealing this slide. Page #4 10 Minutes
Slide 6		A behavior is anything a person says or does that can be observed and measured. Questions that we would ask to determine if a statement describes a behavior. Can it be measured? Can it be quantified? Why is this important to a manager? Many managers waste a lot of time trying to correct or change attitudes, perceptions, etc. This time could be more effectively spent identifying the correct behaviors and reinforcing them. Page #5 & #6 10 Minutes

EDGETraining
systems inc.
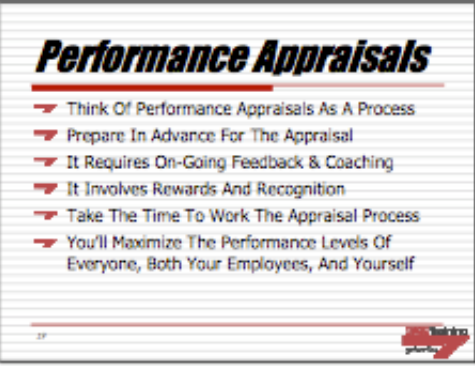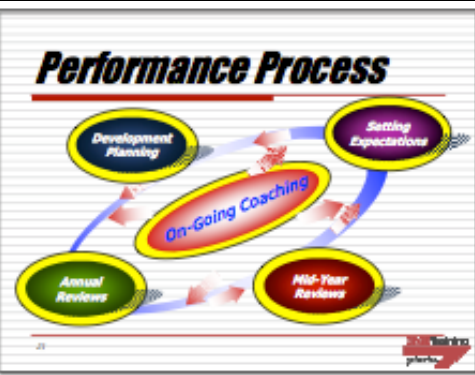
Slide 7	**Setting Goals & Objectives** ▼ Setting Goals Is An Important Part Of Improving Employee Performance ▼ Goals Provide A Structure, Focus & Ways To Measure Improvement ▼ Your Job As A Leader Is To Help Your Employees Write Goals That Are Clear, Concise, Measurable And Self-Fulfilling	Explain the importance of setting goals & objectives Page #7 5 Minutes
Slide 8	**SMART Goals** **Page #8** **Specific:** Be sure to focus on specific issues, behaviors or actions. Seek Clarity! **Measurable:** Put a measurement system in place. If you can't measure something, you can't manage it **Achievable:** Be sure to set a goal that you know is attainable and achievable **Relevant:** The goal must be relevant to their job or to the organization's success **Timebound:** There must be a timeline associated with goals in order to follow up and coach	Setting goals is an important part of improving the performance of your employees. Otherwise, you set people up for failure and they might never reach their performance goals. Facilitator: As you read off each acronym letter, provide a brief description of what it means and have participants complete page #8. SMART goals ensure that the goal you write is able to be accomplished by your employee. Page #8 5 Minutes
Slide 9	**SMART Goals** **Think Of An Opportunity You Have In Your Area And Write A Smart Goal For One Or More Of Your Employees** **Page #9 In Your Workbook**	We're going to practice writing a SMART goal. For this activity, each person will need a partner. You will each pick a goal (work or personal). Individually, write out your goal and make sure that it is SMART. Then, share your goal with your partner. Your partner will then make sure your goal is SMART. Page #9 10 Minutes

Slide 10	**Light The Fire Video** *As You View The Video* **Please Take Note Of The Process For Setting Measurable Goals & Objectives** *Be Prepared To Report Out To The Group*	Light The Fire Video Page #10 24 Minutes
Slide 11	**Light The Fire Video Debrief** *In Your Table Groups* **List Your Ideas From The Light The Fire Video** *Be Prepared To Report Out To The Group*	Video Debrief Debrief the highlights of the video by asking participants to list their thoughts and ideas and share these with the group. Page #10 5 Minutes
Slide 12	**Time For A Break**	

Slide 13	**Personalized Action Plan** ➤ State your objective (what do you want to do?) regarding this particular strength or need. ➤ Plan appropriate actions, learning experiences, and exercises to further develop this area. ➤ Identify other people and resources that you can turn to for assistance in developing this area. ➤ Finally, set specific target dates or milestones for completion of these development activities.	Explain the steps and purpose of creating personalized action plans. Page #11 5 Minutes
Slide 14	**Sample Action Plan** Page #13	Explain the sample action plan. Page #12 5 Minutes
Slide 15	**Personalized Action Plan** **Create Your Own Action Plan Using The Template On Page #13** **Feel Free To Pair Up With A Partner** **Keep In Mind SMART Goals**	Have participants pair up with a partner and create a personal action plan using the template on page #13. When complete, have participants share with the group. Page #13 15 Minutes

EDGETraining

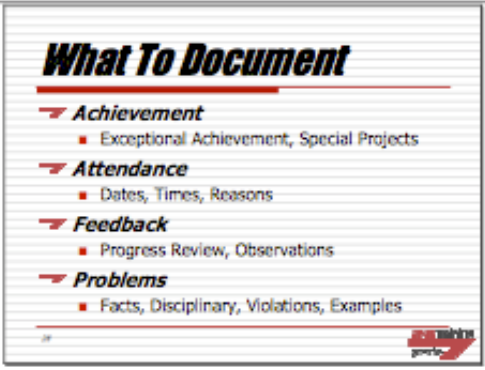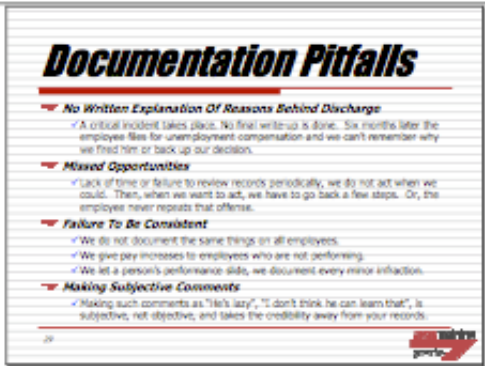| Slide 16	**Developing Others** **Help Your Employees Achieve Their Goals** ➤Identify Current Knowledge & Abilities ➤Recommend Personal Development ➤Provide The Proper Resources ➤Remove Obstacles Or Barriers ➤Continuous Mentoring, Coaching, Recognition ➤Encourage Ongoing Dialogue & Feedback	Explain the process of developing goals and objectives for others. Page #14 5 Minutes
Slide 17	**Determining Existing Skills** **Complete The Template For Identifying Developmental Needs Page #15** (template table: Current Skill / Knowledge, Developing Skill / Knowledge, Coaching Opportunities, Formal Training Needs)	Complete the identifying the developmental needs for others using the template on page #15. Have participants complete the activity using the area of development example. Page #15 15 Minutes
Slide 18	**Action Plan For Others** **Pair Up With A Partner** **Complete The Action Plan For Developing Others On Page #16** **Focus In On One Strength And One Developmental Need**	Have participants create an action plan for developing others using the template on page #16. Page #16 15 Minutes

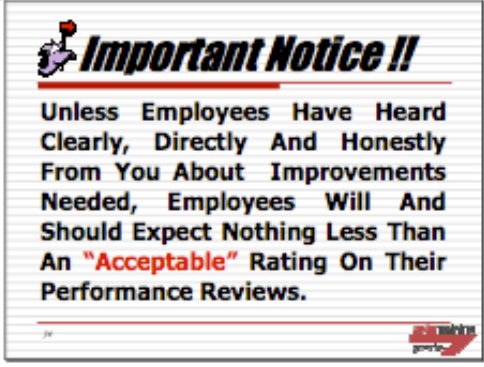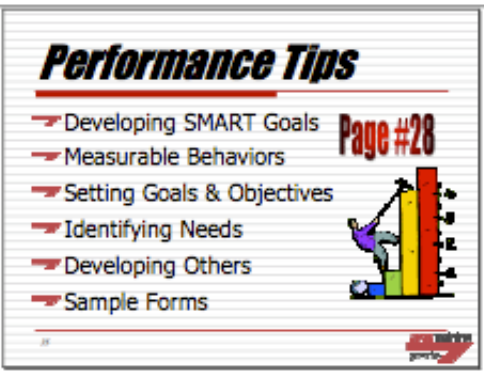|		
Slide 19	**Performance Appraisals** ➤ Think Of Performance Appraisals As A Process ➤ Prepare In Advance For The Appraisal ➤ It Requires On-Going Feedback & Coaching ➤ It Involves Rewards And Recognition ➤ Take The Time To Work The Appraisal Process ➤ You'll Maximize The Performance Levels Of Everyone, Both Your Employees, And Yourself	Explain the process of conducting performance appraisals. 5 Minutes
Slide 20	**Performance Appraisals** **Some Things To Remember** ➤ *Judge The Performance, Not The Performer* ➤ *Be Specific & Descriptive In Your Evaluation* ➤ *Support Statements With Specific Examples* ➤ *Provide Constructive Feedback & Coaching* ➤ *Let Employee Share Opinions And Thoughts* ➤ *Actively Listen Without Evaluating*	Hit on these basic tips for conducting performance reviews. Page #17 5 Minutes
Slide 21	**Performance Process** Development Planning • Setting Expectations • On-Going Coaching • Annual Reviews • Mid-Year Reviews	This graphic represents a performance review cycle. Explain the 4 steps in the cycle. Most performance appraisals are completed as a task, vs an ongoing process throughout the entire review cycle. Taken in steps, this process allows for continuous feedback, two-way communications as well as stating clear expectations. Page #18 5 Minutes

EDGETraining

Slide 22		Explain Step #1 in the cycle. Page #19 2 Minutes
Slide 23		Explain Step #2 in the cycle. Page #19 2 Minutes
Slide 24		Explain Step #3 in the cycle. Page #19 2 Minutes

Slide 25		Explain Step #4 in the cycle. Page #19 2 Minutes
Slide 26		"These are the 8 most typical errors managers make in completing performance reviews." Explain in detail the definitions for each rater type. Pages #20, #21, #22 10 Minutes
Slide 27		Explain the importance of creating proper documentation for all employees, and reviewing this documentation with the employee. Page #23 5 Minutes

Slide 28	**What To Document** ▼ *Achievement* ■ Exceptional Achievement, Special Projects ▼ *Attendance* ■ Dates, Times, Reasons ▼ *Feedback* ■ Progress Review, Observations ▼ *Problems* ■ Facts, Disciplinary, Violations, Examples	Explain "what should we document?" Page #24 5 Minutes
Slide 29	**Documentation Pitfalls** ▼ *No Written Explanation Of Reasons Behind Discharge* ✓ A critical incident takes place. No final write-up is done. Six months later the employee files for unemployment compensation and we can't remember why we fired him or back up our decision. ▼ *Missed Opportunities* ✓ Lack of time or failure to review records periodically, we do not act when we could. Then, when we want to act, we have to go back a few steps. Or, the employee never repeats that offense. ▼ *Failure To Be Consistent* ✓ We do not document the same things on all employees. ✓ We give pay increases to employees who are not performing. ✓ We let a person's performance slide, we document every minor infraction. ▼ *Making Subjective Comments* ✓ Making such comments as "He's lazy", "I don't think he can learn that", is subjective, not objective, and takes the credibility away from your records.	
Slide 30	**Documentation Pitfalls** **Accurate Documentation Not Only Reflects Employee Performance** **It Also Reflects Your Performance**	

Slide 31	**Beer Model Feedback**
	
	➤ *Behavior*
	  ■ Describe The Behavior
	➤ *Effect*
	  ■ Describe The Effect On Others
	➤ *Expectation*
	  ■ Define Your Expectation
	➤ *Result*
	  ■ Define The Results Or Consequence
		Explain this method as a quick and easy way to provide feedback, for both positive and negative behaviors.
		
		Page #26
		5 Minutes

Slide 32	**Beer Model** *Use The Beer Model To Prepare Feedback Using The Examples On Page #27* ➤ Behavior ➤ Effect ➤ Expectation ➤ Result	Activity Working in groups of two or three, each individual will select one of the situations below and write a BEER feedback message. Individuals will then share their written message for the group to discuss and edit. Page #27 15 Minutes
Slide 33	**Important Notice !!** If A Manager Has Done A Good Job At Day-To-Day Coaching And Giving Feedback, There Should **Never** Be Any "Surprises" On An Employee's Performance Review.	

Slide 34	**Important Notice !!** Unless Employees Have Heard Clearly, Directly And Honestly From You About Improvements Needed, Employees Will And Should Expect Nothing Less Than An "Acceptable" Rating On Their Performance Reviews.	
Slide 35	**Performance Tips** Developing SMART Goals **Page #28** Measurable Behaviors Setting Goals & Objectives Identifying Needs Developing Others Sample Forms	Have participants go to page #28 and explain the quick reference sheets on communications & non-verbal communication. Page #28 5 Minutes
Slide 36	**THANK YOU**	

| Slide 37 | **What Questions Do You Have?** | Solicit and respond to any questions the group may have. If you do not have an answer, list questions with name of person and email or call them with the answer when you have the answer.

Have participants complete the course evaluations, stand in the back of the room while participants complete course evaluations and thank them for their participations as they exit the room.

Course evaluations (Last 2 Pages in Workbook) |