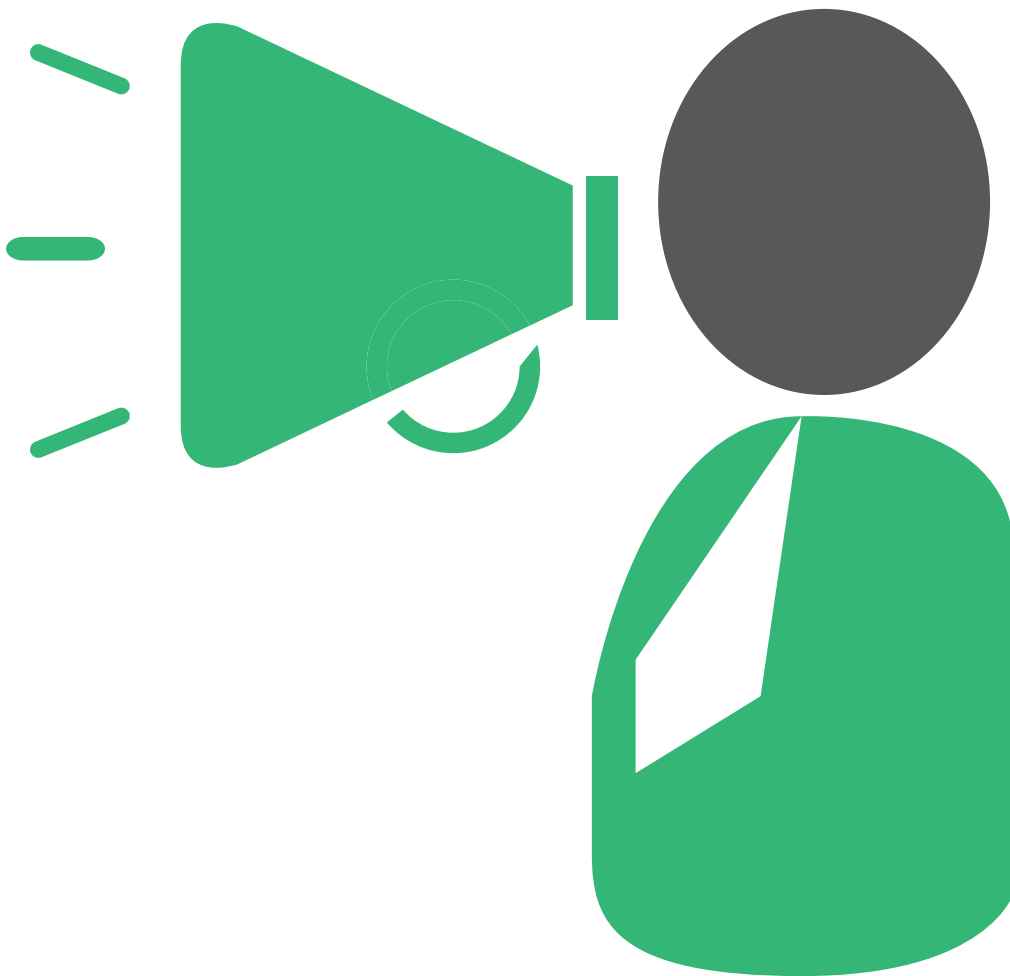

PRESENTS



[Facebook.com/kwelchlin](https://www.facebook.com/kwelchlin)



[Twitter.com/kitwelchlin](https://twitter.com/kitwelchlin)



[Linkedin.com/in/kitwelchlin](https://www.linkedin.com/in/kitwelchlin)



[Youtube.com/user/kitwelchlin](https://www.youtube.com/user/kitwelchlin)



Table of Contents

Introduction.....	2
Session One – Is goal setting a thing of the past?.....	3
Session Two – Managing by Meandering	6
Session Three – Do I Dare Delegate?.....	9
Session Four – Do I Delegate or Just Do It Myself?	12
Session Five – How to Respond Non-Defensively to Criticism.....	15
Session Six – Office Politics.....	18
Session Seven – Managing Change	21
Session Eight – How Formal Do Performance Appraisals Need to Be?.....	24
Session Nine – Who Should Give the Performance Appraisal?.....	27
Session Ten – Tips for Appraising Performance	30
Session Eleven – Performance Appraisals. What Could Go Wrong?	33
Session Twelve – Performance Appraisals and Highlights Documentation	36



Introduction

Welcome,

Thank you for purchasing The Managerial Communication Kit.

This Managerial Communication Kit Includes 12 videos each with a discussion guide that will help put these concepts into practice.

This program can be taken as a self-study course, used as a weekly or monthly management meeting kickoff activity or at professional association board member meetings as a leadership development tool.

You can set the pace and order of sequence of the modules.

Let's jump in and get started!



Session One

Today's session is on Goal Setting. Is goal setting a thing of the past?

Video Title and Link: [Managerial Communication: Isn't Goal Setting a Thing of the Past?](#)

It would be difficult to play soccer, hockey, or basketball without goals. How would you measure progress? How would you know you were successful? It's the same thing when it comes to our work life.

Goals help coordinate resources: human, mechanical, physical, and financial, for the greatest impact.

Once we know our organization's vision, mission, and values, the next natural step is to set goals that represent and live up to those principles.

Goals need to be specific, measurable, action-oriented, realistic, and timely. As supervisors, managers, and leaders, we need to consider the importance and degree of difficulty of the goal and provide adequate resources to guarantee success.

Let's listen in on a conversation concerning this issue.

Direct Video URL: <https://youtu.be/4BmCWITXPLw>



Video Summary

Goal setting. Goal setting. Goal setting. Ever feel like you spend so much time setting goals for your staff, you don't have time to do your job? Besides, don't you wonder sometimes if goal setting is a thing of the past?

Goal setting is a thing of the past, the present, and the future. All should be considered in effective goal setting.

There are two different ways to set goals: they can be assigned by the leader, or they can be determined in collaboration between the leader and the staff member. Employee participation often creates higher goals, makes those goals more acceptable, and makes it less likely there will be resistance to a process in which they actively participated.

Also, goals need to be challenging: not too easy and not too hard, but just right. Consider the past performance and output, discuss reasonable future possibilities, and set challenging, but not impossible goals.

A great way to accomplish effective goal setting is to keep these three Q's in mind: Quickness, Quantity, and Quality. **Quickness** considers when are we going to start and when are we going to stop. A deadline for achievement creates a sense of urgency. **Quantity** considers the general objectives and activities to be done. Quantity takes in account what tasks need to be done, how tasks are to be done, and what outcomes are expected. **Quality** considers the level of performance expected. Quality describes the target or standard of performance to be reached with the product, process, and service. One-hundred percent, defect-free, excellent versus just good enough.

Your first goal today is clear: set specific goals with your staff not for them. Collaborate with your coworkers to quantify specific high-quality goals.

In conclusion, consider the past and the lessons learned. Be honest about the current situation. Then set challenging, yet realistic goals that get results. Goal setting will make your job easier because challenging goals set cooperatively, will motivate your staff to live up to the quickness, quantity, and quality standards we can all be proud of.

Discussion Guide

- Who in your department do you need to set goals with rather than for?

- What are your organization's top three goals?

- Discuss the three Q's for each organizational goal listed above:
 - Quickness: Are the deadlines clear and measurable?
 - Quantity: Are the activities and tasks clear and measurable?
 - Quality: Are the standards or targets clear and measurable?

What specific, measurable, action-oriented, realistic, and timely goals does your department or organization overall need to set?

Session Two

Today's session is on Managing by Meandering.

Video Title and Link: [Managerial Communication: Am I Managing or am I Meandering?](#)

I have discovered over the years that people aren't necessarily loyal to organizations, they tend to be loyal to people.

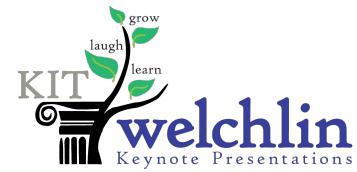
The manager's relationship is a critical element of an employee's overall satisfaction with their career choice and career development.

I'm not sure how strong of a bond you can be build just by communicating through email and text messaging.

Face-to-face interactions, even casual episodes, demonstrate a great importance or value being placed on the relationship. It tells the other person that you have chosen to spend time with them rather than do anything else in your life. This is quality time.

Let's listen in on a conversation concerning this issue.

Direct Video URL: <https://youtu.be/ndXWD8XhHD8>



Video Summary

To be an effective manager, leader or supervisor you need to connect with and interact with your staff. Work is a task event and a social event. However, when you step out of your office and interact with your staff it can feel like you are just goofing off. Be sure to invest your time wisely by managing and not just meandering.

Managing by meandering is a valuable activity. Managing by meandering provides you with the opportunity to give positive as well as constructive feedback in a casual, non-threatening way. There is a substantial body of research showing that feedback leads to increased employee performance.

Feedback tells people how well they are doing. If feedback is favorable, it acts as a positive reinforcer. If the feedback indicates inadequate performance, it may result in increased effort.

When it comes to managing by meandering, you will find it to be a great tool for providing feedback – on the spot – when it will have the greatest impact.

Keep in mind, if you are concerned about changing behavior, delays providing feedback on the substandard behaviors, lessens the likelihood that the feedback will be effective in bringing about the desired change.

Feedback is most meaningful to the recipient when there is a very short interval between the behavior and the feedback; that is what managing by meandering is all about.

Besides, providing feedback also conveys that you care about how they doing.

So, be sure to mingle with the masses. Go out to interact with your staff, and try this managing by meandering, and give your employees some feedback.

Consider managing by meandering. You'll build a more positive relationship with each of your staff members and you will take the surprise out of those painful performance appraisals.

Discussion Guide

- How often do you intentionally get up and get out and mingle with your staff?
- Which work relationships, where someone is struggling in their job, would or could benefit from a casual conversation about job performance?
- Which work relationship, where someone has been a steady performer, could benefit from some relational maintenance and a casual conversation about their job performance?
- Set a goal to “catch” everyone you supervise doing a great job.

Session Three

Today's session is on Delegation. Do I Dare Delegate?

Video Title and Link: [Managerial Communication: Do I Dare Delegate?](#)

One of the greatest time management strategies for supervisors, managers, and leaders, is delegation.

It is amazing what you are willing to delegate when you are going on vacation for a week or two.

Also, isn't it interesting when someone quits unexpectedly, or takes a leave of absence, how quickly we divvy up their work to others.

Can you imagine how powerful delegation could be if we do it deliberately?

Imagine the positive impact that strategic delegation could have on building trust, improving decision making, enhancing our work relationships, and developing our subordinates.

Let's listen in on a conversation concerning this issue.

Direct Video URL: https://youtu.be/R_qKeHgVSKU

Video Summary

You might be a person that is highly skilled and you know that things need to be done and done right. Do you dare delegate?

The answer is probably yes! You can dare to delegate. Here are the determining factors concerning whether you should delegate or not.

The first thing to assess is your organization's culture. Does your organizational culture tolerate risk? Support employee growth and development? Seek a high degree of autonomy for employees? If the answers to these questions are yes, then feel free to delegate.

There are three other considerations to keep in mind.

First: What is your perception of the employee's competence? Is this person capable, trustworthy, and motivated to assume great responsibility?

Second: How important is the decision? Managers tend to delegate the less important decisions to subordinates. Consider the level of risk involved if the delegation isn't as successful as you planned.

Third: What is the manager's workload? Sometimes heavy workloads can put stress and time pressure on managers, which may lead to rash or even reckless delegation. Even if the workload is heavy, the key to low-risk delegation is to be thoughtful and deliberate in assessing the value of the delegation.

There are some good reasons to delegate:

- It helps in managing time more efficiently and effectively.
- Delegation can probably improve decision-making.
- Delegation certainly develops employees and enhances their commitment to the organization and its objectives.

Discussion Guide

- List three routine tasks, you currently perform, that a staff member could do and experience some professional growth?

- What is your organization's culture?
 - Does your organizational culture tolerate risk?
 - Does your organization support employee growth and development?
 - Does your organization seek a high degree of autonomy for employees?

- Identify one task you are willing to delegate.
 - Who is the ideal employee?
 - How important is the issue or concerns?

Share with your table partners what you will do now, instead, with the time you have freed up through delegation.

Session Four

Today's session is on Delegate. Do I Delegate or Just Do It Myself?

Video Title and Link: [Managerial Communication: Do I Delegate or Just Do It Myself?](#)

Being a supervisor, manager, or leader, can be a busy job.

Throughout the work day we get pulled in many directions and must be able to manage multiple priorities.

Being skilled in delegation can be a great way to get work done and develop staff.

There are certain steps to take to make delegation a success, rather than a mistake.

Both you and the person you delegated to, need to be prepared for expected obstacles, and be prepared with plans on how to deal with the unexpected.

Clear and concise communication is the key.

Let's listen in on a conversation concerning this issue.

Direct Video URL: <https://youtu.be/XBBPjaJYf94>

Video Summary

Sometimes it feels like you have 400 things to do today. You're here, you're there, you're everywhere. You know what they say, if you want a job done and done right – do it yourself. However, sometimes you just don't want to do it all yourself. So, do you delegate or do you just do it yourself?

There are a number of good reasons to delegate. Delegation can free up some of your time, possibly improve decision making, enhance commitment, and improve relationships because it demonstrates trust. However, it needs to be done well, otherwise it could be costly in time and money.

Be sure to clarify the assignment. Make sure it is crystal clear what you are asking people to do. Carefully describe and define all the components of the task. Specify the coworker's range of authority. What can they do, can't do, look at, can't look at.

Allow your coworker to participate in determining what they may need to be successful. Think about the relationships that will be affected, maybe you work well with someone, and they don't. Give them the communication strategies you use, so they can be as successful in their relationship as you have been.

Schedule feedback loops to keep the task on schedule. Check in half way through, three-quarters of the way, and close to the deadline. Discuss problems privately and acknowledge their success publicly.

Finally, keep this in mind, when you effectively delegate a task to someone else you go from 60 minutes of productivity per hour to 120 minutes of productivity per hour.

So, if you delegate many of your tasks to many people you may get hundreds of hours of productivity per hour. You will have your 400 things to do today, done by noon tomorrow.

Consider your organization's culture concerning tolerance for risk. Consider your coworker's level of competence and the importance of the decision. Then delegate and develop your staff.

Discussion Guide

- Consider a task you could delegate to a staff member. What information or guidance would you need to include to clarify the assignment?
- What will you say to specify the range of their discretion or authority?
- Draft two questions you will be sure to ask the subordinate to promote active participation and discussion concerning the delegation?
- How long will this task or project take and when and how will you check in with them to get feedback concerning progress or problems?

Share with your table partners what you are going to delegate and your answers to the questions listed above.

Session Five

Today's session is on How to Respond Non-Defensively to Criticism.

Video Title and Link: [Managerial Communication: How Do I Respond Non-Defensively to Criticism](#)

As a manager, leader or supervisor, it seems you are responsible for everything. The buck stops with you.

You are scrutinized for overall results, employee engagement, and giving good directions.

And, of course, you want to create a communication climate at work where you get honest feedback about our own performance, from people above you, below you, and either side of you, concerning how you are supporting the organization's success.

When you receive criticism from others, it is a great opportunity for you to be a role model in demonstrating how to respond professionally to criticism.

Let's listen in on a conversation concerning this issue.

Direct Video URL: https://youtu.be/VsoX_IOLHYg

Video Summary

When in a high-profile position, a person is sometimes a target for criticism. Being criticized is hard enough when the criticism is clearly unfair, but it's often even harder to hear when the criticism is on target.

Regardless of the accuracy of your critic's comments, we either feel like counter-attacking or withdrawing non-assertively. Here are some options that can help respond non-defensively to criticism.

Seek more information. It is foolish to react to a critical attack until you understand what the other person has really said. Be patient and you will learn that you can listen to hostile comments without necessarily accepting them. Then, again, you might just see that the criticism is valid.

You can ask for specifics. Ask what, how, and when questions to get more specific information.

You can also respond by paraphrasing the critic's comments. By clarifying the complaints through paraphrasing, you will improve understanding and learn more about their objections.

You can ask about the consequences of your behavior. Investigate through casual conversation and find out exactly what troublesome consequences your behavior has for them.

You can also agree with the facts, or agree in principle, or at least agree with the critic's perception, and accept that's the way they see it.

Some critics don't seem to deserve the kinds of respectful responses discussed here. Some people are more interested in attacking than explaining. Before you counterattack hostile critics, ask yourself whether a defensive response will be worth the consequences.



Discussion Guide

- Recall a recent episode when you received criticism from a coworker or staff member.
- What was the issue?
- Upon reflection, was any part of the criticism on target?
- If you could go back in time, what questions would you ask to get more information and specifics?
- What effect did that criticism have on your work or attitude toward that person?

Discuss with your table partners strategies for giving and receiving criticism.

Session Six

Today's session is on Office Politics.

Video Title and Link: [Managerial Communication: What About Office Politics?](#)

I have noticed that office politics are present in nearly every organization.

It seems natural, given all of the different personalities, intentions, motives, goals, and ambitions, that there would be some jockeying for position and resources.

The key is to make sure that you don't stain your reputation in your organization or industry by being too political, and violating your own or the organization's values.

Politicking doesn't have to be dirty. It can be managed through strategic communication and forming alliances.

Being an assertive communicator, aligning yourself and your department with the organization's values, and participating in your organization's customs and rituals, would be a good start.

Let's listen in on a conversation concerning this issue.

Direct Video URL: <https://youtu.be/MuEQLXaF1eg>

Video Summary

Office politics occur in nearly every organization. When a person is in a powerful position and is in the center of influence, office politics can often become an issue.

Given the different goals, values, interests, resources, budgets, salaries, space allocations, and projects, there will always be some politics involved. You can either be skilled at politicking or you can become a victim of it.

So here are some general guidelines and strategies.

The first concept is to develop the right image. This is referred to as impression management, creating and shaping a particular identity in the mind of others during our interactions with them. Pay attention to the organization's culture, wants and values, dress and attire, risk taking, and preferred leadership style.

The second concept is to be visible. Be in the line of sight. Attend the organization's social events, be active in professional associations, and develop powerful allies who will speak positively about your conduct and accomplishments.

The third concept is to get a few mentors. Find a few people with great reputations that can help you navigate your career. Find mentors that encourage you, help you, stand up for you, provide access to information, provide insight, and share sound strategies for success.

Office politics exist. Try these strategies. Use facts and logic to persuade. Be friendly and humble. Volunteer to be on committees and build coalitions. Be assertive and not aggressive in your approach. Politics often determines who gets what, when, and how. So, go ahead and get yours.

Discussion Guide

- Given your organization's culture, what do you believe are the personal traits and actions that would represent the right image?

- To be more visible within the organization, what activities, committees, or events could you or should you become more involved?

- What professional associations or community events could you or should you become more involved?

- Who could be your mentors?
 - Inside your organization or industry?
 - Outside your organization or industry?

Discuss with your table partners which organizational issues does politics play a role?

Session Seven

Today's session is on Managing Change.

Video Title and Link: [Managerial Communication: How Do I Manage Change?](#)

Every industry I have consulted over the years has gone through significant change.

Whether it is new software, exposure to an overwhelming amount of data, or how the different generations approach work. Change is happening everywhere.

To be sure the changes won't create chaos, it is your job as a manager to lead people through the change.

It is important to get key staff through the changes, and also get the organization through the changes, in one piece.

There are a number of no cost and low-cost strategies to do just that.

Let's listen in on a conversation concerning this issue.

Direct Video URL: <https://youtu.be/PXlxYem-KVw>

Video Summary

Managing change is a great challenge in a fast-paced and non-stop organization. Change seems to be affecting every industry. Given the pressures of technology, information, and people demanding more with less, change and transition has become the norm.

As a manager, you can have quite a positive impact in helping your staff succeed through chaos and change. Here are some suggestions that can help manage change.

Describe the change in as much detail as a possible. Consider who is losing what and what is changing for everybody.

Listen and acknowledge concerns, encourage people to share how they feel, give them extra attention and emotional support, empathize, and then focus on what work still needs to be done, and maintain a realistic viewpoint concerning productivity.

When coworkers are stunned by change, help them to recognize that it is normal to feel frightened, frustrated, and confused. Create some temporary processes and procedures. Provide training in problem-solving and decision-making skills. Schedule short meetings to get progress reports and celebrate successes.

Finally, be consistent: with the message, with your actions, and with rewarding people for new behaviors and taking risks.

When the industry is changing, and your organization is changing, one key to keeping people engaged is to ensure there are quick successes. Quick successes reassure the committed and convince the skeptics. Manage change by reinforcing the new beginnings. Focus on the future and encourage experiment.

Discussion Guide

List the changes you are dealing with at work.

- What is changing?
- What is actually ending?
- Who is losing what?
- What is over for everybody?
- What is continuing?

Discuss with your table partners:

- *What are some temporary policies or procedures that will help support the changes and transitions?*
- *What areas of training would help get people and the organization through the changes?*

Session Eight

Today's session is on appraising performance. How Formal Do Performance Appraisals Need to Be?

Video Title and Link: [Managerial Communication: How Formal Do Performance Appraisals Need to Be?](#)

Most organizations I consult continue the practice of formal, annual, performance appraisals. Some of my clients are moving toward more casual conversations about performance.

I prefer a review once a year that is a little more formal, reviewing job descriptions, responsibilities, and changes, plus three quarterly appraisals that are a little less formal and more casual, yet reiterate the important tasks of the job, and report progress being made.

Provide both positive and constructive feedback. It really shouldn't make a difference whether we like the person or not, we should provide an accurate appraisal of that person's job performance.

Prepare, plan, and present the information in a way that the details of the job description, the duties, and responsibilities, and objectively measures performance results.

We need to know, and employees need to know, clearly, the expectations of the job, and how they are doing.

Let's listen in on a conversation concerning this issue.

Direct Video URL: <https://youtu.be/cK14JbPNeVI>

Video Summary

Performance appraisals should be more of a partnership than a power trip. Many of us have endured years of annual, tooth-pulling, painful performance appraisals. Now organizations are getting more casual about performance reviews and sometimes have quarterly conversations instead. There still is a process to consider.

Whether formal or informal, you need a process that supports success.

First, establish clear performance standards and communicate performance expectations to the employee. Consistently gather performance data throughout the year. Honestly rate performance and discuss the results. Formal performance reviews should be conducted once a year at a minimum. Twice a year is better. Quarterly is ideal for some.

The informal performance appraisal is the day-to-day assessment. The effective manager or supervisor continually provides informal feedback to employees by positively commenting on the positive aspects of their work and pointing out problems when they surface.

Whether it is a formal review or a casual discussion, here are the keys to keep in mind. Listen carefully, sometimes for comprehension, sometimes for evaluation, and sometimes to demonstrate empathy. Be sure to discuss the employee's total performance. Begin with areas of excellence to bolster confidence. Communicate factual, performance-related information, with examples.

Next, discuss needed improvements. Communicate factual, performance-related information, with examples. End with discussing a positive area of performance. Be sure employee understands all that has transpired. Conclude with a note of trust and open communication.

Talking about areas of excellence is easy. Talking about areas for improvement can feel awkward, but it's necessary. We should always take performance appraisals seriously. Whether it's a formal or informal performance appraisal, we are still talking about a person's career success, how they make their money, and feed their families.

Discussion Guide

- How often does your organization have performance appraisals?

- Does every supervisor and manager keep up-to-date records throughout the year?

- Have there been any changes in job duties and responsibilities for your staff?

- Have clear performance standards and expectations been thoroughly communicated?
Which areas need to be re-visited and reinforced?

- What are the situations or issues during the performance appraisal discussion when you need to:
 - Listen for comprehension and understanding?

 - Listen for evaluation?

 - Listen to demonstrate empathy?

Discuss with your table partners how your organization's performance appraisal process could be improved.

Session Nine

Today's session is on appraising performance. Who Should Give the Performance Appraisal?

Video Title and Link: [Managerial Communication: Who Should Give the Performance Appraisal?](#)

Over the years I have noticed that work relationships can get bruised and damaged.

Sometimes strong personalities and past negative interactions can cloud objectivity in performance appraisal discussions.

We might want to consider whether we are the right person for delivering the performance appraisal to that person.

We hope all people approach their work in a professional manner and have the goal of building effective work relationships, however, that is not always the case.

It is important that we give everyone a fair shot in receiving accurate and useful feedback, and in receiving guidance that will lead to their career success.

Let's listen in on a conversation concerning this issue.

Direct Video URL: <https://youtu.be/DDYv9kQhMPI>

Video Summary

Many people prefer **getting** performance appraisals rather than **giving** them. Most people don't enjoy preparing and delivering performance appraisals. People often ask, ***“Could someone else do it?”***

“Who should give the performance appraisal?” Most of the time it is the employee's immediate supervisor or immediate manager who provides the appraisal. However, other options include a boss that is one or two levels up, the employee's immediate subordinates, the employee's peers, or even a self-evaluation.

Consider the willingness of both parties, whether you like one another or prefer someone else. Sometimes it's best, no matter who develops and delivers the performance appraisal to have Human Resources participate.

The decision on who does the appraisal should focus on ensuring the appraiser has adequate knowledge of the employee's job and has frequently observed first-hand the employee performing the main facets of that job. When it comes to appraising performance, this is an activity that should be going on continually.

If you are choosing someone else to do the appraisal, you can still play a critical role. You should keep an ongoing diary or file for each of your employees and record actual incidents, behaviors, or outcomes that affect job success or failure. The frequency of observation improves the quality of the data you gather.

Accuracy and consistency increase when you focus on only job-related behaviors. Consider each aspect of an employee's performance independently. Support your ratings with documented evidence.

So, who should give the performance appraisal? The person who has had frequent opportunity to observe the employee in action. Consider willingness, affinity, and access, then accurately assess performance.



Discussion Guide

- List all of the people that you prepare and deliver performance appraisals.
- Consider each person on the list. Is there a better method (possibly peer-to-peer, self-evaluation, or a different manager than you) that would be more effective?
- What issues or performance appraisal considerations would you include Human Resources?
- Are there employees from other departments that you interact with frequently that you could provide valuable information to their manager or supervisor to enhance the accuracy of their performance appraisal?
- Discuss with your table partners about how performance appraisals could be done differently and maybe more effectively.

Session Ten

Today's session provides Tips for Appraising Performance

Video Title and Link: [Managerial Communication: Any Tips for Appraising Performance?](#)

I like tip sheets. I have always found it useful to have some sort of a tip sheet to review before I enter into an important conversation where active listening is critical, where negotiations are crucial, or where customer service is questioned.

We should be prepared as much as possible and be at our professional best when it comes to giving performance appraisals.

Keep this in mind, full-time employees invest more than 2,000 hours each year to supporting the organization's efforts, the least we could do is review some time-tested guidelines to make sure that the short time we discuss their performance is valuable and useful.

Let's listen in on a conversation concerning this issue.

Direct Video URL: <https://youtu.be/WT9rr68jzjY>

Video Summary

We are all busy people and have a lot going on. Now pile on performance appraisals, and we feel like *“I don’t have time for this.”* It would be nice to have something that resembles a pilot’s pre-flight checklist to use to help get prepared. Here are some tips for appraising performance.

Review their job description. Recall examples for praise and criticism. Schedule the appraisal a few weeks in advance. Provide the employee a self-evaluation form with open-ended questions to fill out as part of their preparation. Consider the purpose of the appraisal. Is it a personnel decision, or a possible promotion, or is it to provide recognition, or is it to discuss job related problems?

Focus on being helpful and constructive. Be encouraging rather than threatening. Fear can interfere with open dialogue. Focus on being supportive and understanding and create a climate that puts the employee at ease.

Pay attention to your listening skills. Let the employee talk more than you. Be flexible with the conversation. Allow them to identify and lead the discussion concerning some of the problems and solutions. Address issues thoughtfully and show concern.

Soften the tone when criticizing, but not the message. Be kind, but clear. Provide specific examples of job-related behaviors and focus on the performance and not the person. Don’t exaggerate or stretch the truth. Beware of saying terms like *“always”* or *“never.”* If they provide one example that is an exception you lose credibility and the process loses validity.

Give positive as well as negative feedback. Recognize good performance as well as areas for improvement, whether you like the person or not. Invite the employee to summarize the appraisal review process and results. Collaborate and corroborate a detailed step-by-step future plan of action. Never forget the goal: to bring about a better future. Provide some guidance that will help them become a superstar. So, have a checklist and refer to it regularly. Be prepared. Gather facts throughout the year. Maintain your notes, and take note, of great performance behaviors and great performance opportunities for growth.



Discussion Guide

- When was the last time you reviewed all of your staff member's job descriptions? Who has copies? You? HR? The employee?
- Draft some questions you would like included on the self-evaluation form:
- List your staff members. What's the purpose of their next performance appraisal? Performance improvement? Possible promotion? Recognition?
- For the employees that are struggling to be successful in their jobs, what are going to be some of your suggestions for step-by-step future plans of action?
- Discuss with your table partners open-ended questions you would like to see, include in a self-evaluation form to help employees prepare for their performance review.

Session Eleven

Today's session is on Performance Appraisals. What Could Go Wrong?

Video Title and Link: [Managerial Communication: Why Do Performance Appraisals Go Wrong?](#)

You are in the position you are in, because of your knowledge, skill, and talent.

One of your duties probably includes appraising the performance of others that are now in the same position you used to have. They could even be an employee you have trained and have shared your expert knowledge.

We want to be sure that our past relationships, with the person and the position, don't contaminate our conversations concerning their performance.

Self-awareness is a key to emotional intelligence. Self-awareness is also a key to giving intelligent performance appraisals.

Let's listen in on a conversation concerning this issue.

Direct Video URL: <https://youtu.be/-SasF4wIYOs>

Video Summary

You are competent and confident. Sometimes you can forget that the people you supervise may not be. Often, you have done many of their jobs, have set the standard, and you may be a little competitive. Years ago, I came across a great article by Terry Lowe, entitled, Eight Ways to Ruin a Performance Review.

One way to ruin a performance review is the **Halo Effect**, which happens when we like the person, and positive ratings are given to all job duties, when that person really only excels in one.

The **Pitchfork Effect** is the complete opposite. When we don't like one particular trait the employee gets negative ratings for all areas of their performance.

The **Central Tendency Bias** can also occur when we resist giving the highest ratings (no one is that great) and we resist giving the lowest ratings (because no one is that bad) and all of the scores appear somewhat average.

The **Recency Error** can occur when we rely too much on the most recent events or performance and we don't recall earlier performance behaviors.

Sometimes, when someone has been part of the organization for a long time, we can fall victim to the **Length of Service Bias**. Because their performance was high in the past, we give them a break on their current performance ratings.

When we are too kind, or want to minimize conflict or tension, we may become a **Loose Rater** and brush over the areas of substandard performance, and dwell, instead, on the average or better areas of performance.

Sometimes we are in a bad mood and become a **Tight Rater**, and are so critical, we believe that nobody has been performing at the necessary standards.

Finally, we may be a **Competitive Rater**. This happens when we are appraising the performance of someone that is doing our old job, and of course, they can't perform any task or job duty as well as we did.

Discussion Guide

- Discuss with our table partners, which of the ways to ruin performance appraisals, you have experienced in the past.
- Which staff members bring out which perceptual tendency, bias, or bad performance appraisal behavior in you? Why?
- What can your management team do to recognize and neutralize these performance appraisal errors?
- Discuss with your table partners how you will make sure these issue won't affect future performance appraisals.

Session Twelve

Today's session is on performance appraisals and highlights documentation.

Video Title and Link: [Managerial Communication: Any Tips on Documentation?](#)

One of the areas of the performance appraisal process often lacking is documentation.

There should be documentation of the employee's performance throughout the year.

Besides that, there is probably a treasure trove of information, that can be gleaned, from the notes and documentation from past performance appraisals.

If we review a few past years' performance appraisals we may discover opportunities for delegation, mentorship, and leadership development.

Former managers spent a considerable amount of their time (hopefully) carefully preparing past appraisals. This history may provide opportunities for recognizing past shared efforts for personal and professional growth and development.

Let's listen in on a conversation concerning this issue.

Direct Video URL: <https://youtu.be/QeIIIn4B7GrI>

Video Summary

Over the years I'm sure you have been exposed to a variety of performance appraisal systems. Some were hard copies with pen and paper, some were software based, some simple, some complex, some with numbers, some with letters, and some with words. Regardless, the format, good documentation is critical. A great way to start is to review the employee's prior years' performance appraisals before attempting to draft a new one.

Performance reviews are absolute, not relative. Compare performance to an objective standard, not other employees. Whenever possible, shift the responsibility for evaluating performance back to the employee. "How would you grade yourself on work quality, reliability, interpersonal communication, or technical skill?"

Avoid the term "attitude." Instead, be sure to describe the objective behaviors that create a negative perception of the employee. Provide dates, times, places, and people, describing when they lost their temper, used profane language, or raised their voice in anger. So, use the phrase "*For example...*" regularly throughout the appraisal discussion.

You should keep track of and mention the efforts you've made to help the employee meet performance standards throughout the review period. Remind them about when you gave them a copy of the attendance policy, paid for their attendance at a workshop on dealing with interpersonal conflict, or encouraged them to take an accounting class.

When documenting core competencies or technical issues, expand your basic ideas by employing a "**by...**" format. Such as, **by** upgrading their software skills, **by** attending educational workshops, **by** participating in professional associations.

When documenting future development goals, consider strengthening the clarity of your message by applying the "**I expect you to...by...**" format. Such as, "**I expect you to** improve client relations skills **by** following up within 24 hours, **by** scheduling monthly meetings with them, and **by** emailing weekly status updates of their work orders. Performance appraisals need to be focused more on the future than the past. Describe the behaviors that will support their successful future.

Discussion Guide

- Which performance appraisal formats do you find to be easy to use and beneficial to the employee?
- List and describe objective behaviors that create a negative perception of an employee and should be documented.
- What bad behavior have you witnessed that needs to be addressed and documented?
- Does your organization have a standardized form for efficiently and effectively document episodes – good or bad? Dates, times, places, people, policy?
- Draft a “by...” format message.
- Draft an “I expect you to...by...” format message.
- Discuss with table partners and share ideas on improving documentation.

“ Helping
People
Get More Done in Less Time ”

— AND —

“ Helping
Organizations
Get Their People to Work Together Better ”

Chaos & Change Management • Customer Service • Difficult People • Gender Communication
Generations at Work • Interpersonal Communication • Leadership • Listening • Persuading & Influencing
Problem-Solving/Decision-Making • Self-Esteem • Stress, Time & Procrastination • Team Building



[Facebook.com/kwelchlin](https://www.facebook.com/kwelchlin)



[Twitter.com/kitwelchlin](https://twitter.com/kitwelchlin)



[Linkedin.com/in/kitwelchlin](https://www.linkedin.com/in/kitwelchlin)



[Youtube.com/user/kitwelchlin](https://www.youtube.com/user/kitwelchlin)