In Praise of Appraisal – Part 2

In Praise of Appraisals II

“To win in the marketplace you must first win in the workplace.”

Douglas Conant, former CEO of the Campbell Soup Company

Key Questions

Careful planning and preparation are key to the success of most projects, and appraisals are no different.

One of the biggest challenges you will face is ensuring the appraisal system is both fair and consistent. So, there are some key questions to ask. Who will run them? How often will they run? What format will they take? What data will be collected? Will pay be discussed? Can staff appeal?

Only when you know the answers to these fundamental questions should you proceed.

The paperwork

Designing suitable paperwork is not easy but it is important. Paperwork will form the focus of the appraisal discussion and will provide a means of recording the conversation and the outcomes.

Job Roles

It can be useful to start off the appraisal by considering the job role. What are the key responsibilities? Do these match the current Job Description? Which parts of the job does the individual enjoy? Which do they not?

This section of the paperwork helps to set the scene and find out more about what motivates the individual. It also helps keep the Job Description up to date and relevant.

Looking at the job role can also help reveal training needs. It may be that the individual cannot fulfil an aspect of the role as they haven’t received essential training. You would think this fact would be obvious but it’s surprising what hidden facts can be revealed during an appraisal.

Performance Measures

This section is somewhat subjective but it does force the manager and individual to look at performance in a rational way.

Measures such as attendance, punctuality, dedication, commitment, quality of work, meeting deadlines, customer service and working with others could all be covered.

Scoring should be kept simple (such as 1-5) and should always be backed-up with examples taken from the workplace. This approach helps rationalise any differences between what the manager thinks and what the individual thinks.

If there is disagreement however you need to be prepared for it and have a plan to resolve it. Always bear in mind that we are trying to make the most of our staff, not criticise them!

Personal Objectives

Personal objectives are central to most appraisal systems and should reflect the objectives of the business.

The extent to which an individual has met their objectives is a matter of opinion of course but, if it’s backed up with evidence from the workplace, then the assessment should be easier.

Career Aspirations

It’s important not to set unrealistic expectations here but it’s also important to understand the ambitions and motivations of staff. Succession planning can be a challenge so it’s handy to know who has the desire and potential to progress. Just be careful not to promise something you can’t deliver!

In the Final Instalment

We shall consider how to organise and run the appraisal interviews.