

PERFORMANCE PLANNING

Beginning of the Appraisal Period

GUIDES

- Establishing Performance Plan using SMART
 - The Link between Strategic Target, Business Units / Department KRAs & Targets, and Individual KRAs & Targets
 - How to Set Targets
 - Writing SMART Targets
- Keeping Performance Surprises to the minimum

CHECKLIST

- Define the purpose of the job, job duties, and responsibilities.
- Define performance goals with measurable outcomes.
- Define the priority of each job responsibility and goal.
- Define performance standards for key components of the job.
- Are the targets linked to the Business/ Development Plan?
- Have the targets been mutually agreed?
- Is the wording clear and concise?
- Are they SMART targets?
- Review with the staff member previous year's performance and potential areas of development.
- Discuss on the year's performance development plan and learning development plan.

MID-YEAR REVIEW

6-month Performance Period

GUIDES

- Performance achievements
- 5 Most Important Performance Activities
- Performance Challenges or Issues
- Updates on performance objectives and development plan

CHECKLIST

- Does each target contain a single action or activity?
- Goals are within my staff ability to perform and makes them feel challenged.
- Keep the discussion 'on track' and firmly guide it.
- Show your staff member first where you both agree, before pointing out where you differ.
- Show respect for your staff member's opinion.
- Create the impression of fairness and open-mindedness.
- Be willing to change your judgment in the light of new evidence.
- What particular parts of the job interest staff member most?
- What particular parts interest staff member least?
- What, if any, were the reasons preventing staff member from being more effective in these areas?
- What task do you feel you have performed particularly well and why?
- What areas, if any, are unclear in the job?
- What extra help or guidance do you feel you need to do the present job more effectively?

END-YEAR REVIEW

For the 12-month Period

GUIDES

- Last 12-Month Performance outcomes
- Work completed beyond job description
- Strengths of appraisees
- Organisation challenges affecting performance
- Setting new performance plan for next performance period
- Identify development needs

CHECKLIST

- Provide the employee with a written copy of what was agreed to in the appraisal meeting.
- Provide completed, signed version of appraisal to your supervisor for review and forwarding.
- Discuss performance in relation to your staff member's job duties.
- Debrief performance success and failures with the objective to learn.
- Develop a plan for improvement with your staff member.
- Discuss the next performance period's SMART key performance indicators.
- Self reflection:
 - Do I give my full attention to and concentrate on the speaker and message when I am listening?
 - Do I maintain eye contact and give the speaker responses that indicate I am listening?
 - Do I respond to the speaker with statements that reflect, probe, support and advise?

PERFORMANCE CALIBRATION

Optional Performance Review

GUIDES

- Optimising Productivity and Performance

CHECKLIST

- Communicate department goals
- Include HR partner
- Educate supervisors
- Don't hide the process from employees
- Don't expect perfection
- Get the right people involved
- Set appropriate ground rules for meetings
- Leverage the information gathered during the process