

## Course Title: Performance Management & Appraisal Excellence

- **Duration:** 5 Days (approximately 35-40 instructional hours)
- **Course Goal:** To transform performance management from a once-a-year administrative task into a continuous, impactful cycle of goal setting, feedback, and development. This course will equip managers and HR professionals with the practical skills, modern frameworks, and confidence to set clear goals, provide motivating feedback, conduct fair and impactful performance appraisals, and foster a culture of high performance and continuous improvement.
- **Core Focus:** Setting goals, providing effective feedback, and conducting impactful performance reviews.

### Learning Objectives:

Upon successful completion of this workshop, participants will be able- to:

- **Understand** the principles of a modern, continuous performance management cycle.
- **Develop** and align clear, motivating, and measurable goals using frameworks like SMART and OKRs.
- **Master** the art of giving and receiving regular, constructive, and actionable feedback.
- **Conduct** effective coaching conversations that drive employee development and problem-solving.
- **Prepare for and lead** fair, objective, and impactful performance appraisal meetings.
- **Navigate** difficult performance conversations, including addressing underperformance, with confidence and empathy.
- **Mitigate** common biases that can skew performance evaluations and feedback.
- **Link** performance management outcomes to employee development, recognition, and career growth.
- **Utilize** performance management to enhance employee engagement and retention.
- **Create** a personal action plan to implement these skills and elevate their team's performance.

### Target Audience:

- New and experienced managers, team leaders, and supervisors.
- HR professionals, HR Business Partners (HRBPs), and L&D specialists.
- Project managers responsible for team performance.
- Senior leaders who wish to standardize and improve performance management practices across their organization.

### Prerequisites:

- Experience in a role that involves managing or providing performance feedback to others is beneficial but not required.

### Teaching Methodology:

This is a highly interactive and skills-based workshop. The methodology includes:

- **Interactive Lectures:** Introducing core concepts, frameworks, and best practices.
- **Self-Assessments:** Tools for understanding personal feedback styles and potential biases.
- **Case Studies:** Analyzing real-world performance management scenarios.
- **Intensive Role-Playing:** Practicing skills in goal-setting conversations, feedback delivery, coaching sessions, and full performance appraisals in a safe, coached environment.
- **Group Discussions & Peer Coaching:** Sharing challenges, best practices, and providing feedback to peers.
- **Action Planning:** Developing personal and team-based plans to apply learning directly to their work.

*(For **Online Delivery**, this will be adapted using breakout rooms for role-playing, virtual whiteboards (e.g., Miro/Mural) for brainstorming, polls for engagement, and interactive Q&A sessions.)*

### **Materials Provided:**

- Comprehensive digital or printed workbook with key concepts, tools, scripts, and exercises.
  - Templates for SMART goals, OKRs, one-on-one meeting agendas, performance review preparation, and Individual Development Plans (IDPs).
  - Checklists for mitigating bias and conducting effective appraisal meetings.
  - Case study documents and detailed role-playing scenarios.
  - A personal action plan template for performance leadership.
  - Certificate of Completion.
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## **Detailed Day-by-Day Curriculum**

### **Day 1: The Foundation – Modern Performance Management & Goal Setting**

- **Module 1: Rethinking Performance Management (Approx. 2.5 hours)**
  - Welcome, introductions, and course objectives.
  - The evolution of performance management: From annual appraisal to continuous dialogue.
  - The three pillars of modern performance management: Goal Setting, Continuous Feedback & Coaching, and Formal Review.
  - The manager's critical role and the link to employee engagement and retention.
  - **Activity:** "Best vs. Worst" – Participants share experiences with performance reviews and identify key success factors.
- **Module 2: The Art & Science of Goal Setting (SMART Goals) (Approx. 2.5 hours)**
  - Why clear goals are the foundation of performance.
  - Deep dive into the **SMART** framework: Specific, Measurable, Achievable, Relevant, Time-bound.
  - The art of collaborative goal setting with employees to build ownership.
  - Aligning individual and team goals with organizational objectives (cascading goals).
- **Module 3: Advanced Goal Setting with OKRs (Objectives & Key Results) (Approx. 2.5 hours)**

- Introduction to the OKR framework for setting ambitious and measurable goals.
- Writing effective Objectives (the "what") and Key Results (the "how").
- Using OKRs to drive focus, alignment, and engagement.
- **Intensive Workshop:** Participants work in groups to convert vague goals into powerful SMART goals and then into the OKR format for a case study.
- **End of Day 1 Recap & Q&A.**

## Day 2: The Power of Continuous Feedback & Coaching

- **Module 4: Creating a Culture of Continuous Feedback (Approx. 2.5 hours)**
  - The psychology of feedback: Why it's hard to give and receive.
  - Moving from "fear of feedback" to a growth mindset.
  - Giving timely, specific, and frequent informal feedback (positive and constructive).
  - Techniques for soliciting feedback for yourself as a manager.
- **Module 5: Mastering Constructive Feedback Delivery (Approx. 3.5 hours)**
  - Preparing for a feedback conversation.
  - Deep dive into practical feedback models:
    - **SBI Model:** Situation - Behavior - Impact
    - **STAR Model:** Situation - Task - Action - Result
  - Focusing on observable behavior, not personality.
  - **Intensive Role-Play Workshop:** Participants practice delivering both positive and constructive feedback using the SBI/STAR models in coached, small-group settings.
- **Module 6: Introduction to Coaching for Performance (Approx. 1.5 hours)**
  - Differentiating between managing, mentoring, and coaching.
  - The manager's role as a coach.
  - The power of asking powerful, open-ended questions to unlock potential.
  - **End of Day 2 Recap & Q&A.**

## Day 3: Coaching Conversations & Addressing Underperformance

- **Module 7: The GROW Coaching Model in Practice (Approx. 3 hours)**
  - Deep dive into the **GROW** model for structuring coaching conversations:
    - **Goal:** What does the employee want to achieve?
    - **Reality:** What is the current situation?
    - **Options:** What could be done?
    - **Will/Way Forward:** What will be done?
  - Using the GROW model for problem-solving, skill development, and career discussions.
  - **Role-Play Workshop:** Participants practice conducting a short coaching session using the GROW model.
- **Module 8: Navigating Difficult Performance Conversations (Approx. 2.5 hours)**
  - Recognizing the early signs of underperformance.
  - Preparing for a conversation about a performance gap (gathering data, planning the message).
  - A structured approach to the conversation: Stating the issue, exploring causes, agreeing on a solution, and setting follow-up.
  - Managing emotional reactions (the employee's and your own).

- **Module 9: Developing Performance Improvement Plans (PIPs) (Approx. 2 hours)**
  - When and how to use a PIP.
  - Key components of an effective, fair, and legally defensible PIP.
  - The manager's role in supporting an employee on a PIP.
  - Knowing when to involve HR.
  - **Activity:** Critiquing a sample PIP and identifying areas for improvement.
  - **End of Day 3 Recap & Q&A.**

#### **Day 4: The Performance Appraisal – Preparation & Execution**

- **Module 10: Mitigating Bias in Performance Reviews (Approx. 2.5 hours)**
  - Understanding common unconscious biases that affect performance ratings (e.g., recency, halo/horns, leniency, similarity, contrast).
  - Strategies and tools for mitigating bias (e.g., calibration meetings, using objective data, structured reviews).
  - The importance of documentation and specific examples throughout the year.
  - **Workshop:** Participants review performance scenarios and identify potential biases in action.
- **Module 11: Preparing for the Appraisal Meeting (Approx. 2.5 hours)**
  - Gathering and consolidating performance data (from goals, feedback, 360-degree input - if applicable).
  - The employee's role: The importance of the self-assessment.
  - Writing a fair, evidence-based, and constructive performance review document.
  - Structuring the appraisal meeting agenda for a productive conversation.
- **Module 12: Conducting an Impactful Appraisal Meeting (Approx. 2.5 hours)**
  - Setting the right tone and environment.
  - A step-by-step guide to leading the conversation:
    - Opening and setting the agenda.
    - Discussing successes and strengths first.
    - Addressing areas for development.
    - Listening to the employee's perspective.
    - Agreeing on ratings and next steps.
    - Closing on a positive and forward-looking note.
  - Handling disagreements and difficult reactions during the meeting.
  - **End of Day 4 Recap & Q&A.**

#### **Day 5: Linking Performance to Development & Your Action Plan**

- **Module 13: Full Performance Appraisal Role-Play (Approx. 3 hours)**
  - **Capstone Role-Play:** Participants work in small groups (manager, employee, observer) to conduct a full performance appraisal meeting based on a detailed case study.
  - Each participant will have a chance to play the role of the manager.
  - The observer provides structured feedback based on a checklist of best practices learned during the week.
- **Module 14: Linking Performance to Development & Career Growth (Approx. 2 hours)**
  - Using the appraisal conversation as a springboard for development.

- Creating Individual Development Plans (IDPs) with employees.
- Connecting performance to career pathing, promotions, and recognition.
- Ensuring follow-through on development actions.
- **Module 15: Creating Your Performance Leadership Action Plan (Approx. 2 hours)**
  - Reflecting on key takeaways and personal strengths/weaknesses in performance management.
  - **Action Planning:** Participants create a personal action plan to implement specific skills (e.g., "I will start using the SBI model in my weekly one-on-ones").
  - Planning how to introduce or improve performance management processes with their team.
- **Module 16: Course Review & Commitment to Action (Approx. 0.5 - 1 hour)**
  - Review of the continuous performance management cycle.
  - Open forum for final questions.
  - Participants share one key commitment from their action plan.
  - Course evaluation and closing.