

Many of the behaviors used for effective coaching and counseling sessions also apply to conducting the appraisal interview. The session is most effectively conducted in a private, comfortable, nonthreatening environment where outside interruptions are avoided. Encourage a two-way conversation, rather than a monologue. Ask the employee for comments based on her or his self-review. Use open-ended questions, and listen attentively. When giving feedback, be clear and to the point, drawing on comments written on the evaluation form.

Remain objective and nonjudgmental by accentuating job-specific behaviors and outcomes relative to stated business results, technical/functional knowledge areas, or behavioral competencies. Avoid attributing potential problem areas to the employee's personality. Never overtly compare an employee to other colleagues. If you want good performance repeated, call attention to it but ensure that expectations are clearly communicated.

It is also important to stress the continuous nature of the performance management process. Once the appraisal discussion is completed, it will frequently be necessary to review the position's job description, annual objectives, and other performance criteria to determine significant changes in position accountabilities. Any resulting changes should be appropriately reflected in the planning process for the coming year.

3.8 DEVELOPMENT PLANNING

Development planning is a key component of the performance management process because it motivates all employees to enhance personal effectiveness and increase contribution to the organization. It also provides the human resources department with a viable template for developing in-house training or career path programs. The first step in the development planning process is the identification of performance strengths and improvement needs.

Performance strengths can reflect several areas:

- Significant contributions or growth areas
- New skills acquired and job-related advances
- Individual or team goals attained beyond the expected level
- Exceptional performance on technical/functional skills or behavioral competencies

Development needs often reference the following:

- Skill or knowledge requirements for promotion or salary advancement
- A change in performance expectations driven by changing business objectives
- Goal attainment levels below expectation

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3.8 Development Planning

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- Technical/functional skills or behavioral competencies that are not met at full expectation

Once the major performance strengths and improvement needs have been identified, the employee and manager should agree upon, and formally articulate, a performance development plan. The key to defining a successful development plan is to stress those areas that have the greatest importance to job effectiveness. It is often useful to think about how the employee has demonstrated particularly effective or ineffective behaviors on key performance criteria, for example:

- *Customer orientation.* What difficulties has the employee experienced with customers and how has he or she handled them?
- *Communications.* In which situations was the employee able to explain a technical or complex issue in simple terms without losing content?
- *Teamwork.* How has the employee contributed to cross-sell efforts with other areas of the organization?

In most cases, it will be more effective to limit the development focus to a few key performance areas. The development plan should specify three components:

1. *Key action steps.* These should address a variety of activities that an employee can undertake for development. Traditional activities might include attending external training courses or participating in outside coursework; however, other activities can reference on-the-job development of a particular skill set, new and expanded work assignments, participation in joint projects with other departments, or enhanced coaching by a manager or mentor. Development activities should also recognize how an individual can better use performance strengths.
2. *Support/resources needed.* These should specify any assistance that the employee may need to complete each action step. Considerations should include cost constraints, time availability of others whose assistance may be necessary, or availability of relevant materials or supplies.
3. *Timetable for action.* This should indicate target completion dates or milestone achievement dates for completing each action step over the course of the upcoming year.

Once the development plan is drafted, both the manager and the supervisor should chart progress against the specified action steps. Monitoring progress can help heighten motivation by recognizing incremental achievements. Documentation of progress made will also prove useful when assessing performance achievements for the upcoming performance period.