



# Your business grows when you help your people grow...

Most business owners hire new people to help grow their business.

However, hiring new people just isn't enough.

Yes, business owners invest energy, time and money recruiting new people to grow revenues, grow profits and grow the capital value of their business.

There's also the need for new people to make your life as a business owner less hectic and less stressful too. More enjoyable even!

Yet most business owners fail miserably to methodically improve the skills, knowledge and abilities of their existing people.

### In a nutshell

Repeatedly improve your team's skills, knowledge and capabilities and they'll help you build a better business.

### John Lewis, American Express and IBM do it...

Your business can't always recruit, which is why the Human Resource (HR)



departments at Avon, IBM, American Express, KPMG, John Lewis and others take performance reviews so seriously.

They seek to improve the talent in their

### Here's a proven solution for you

Better grow your people. Build and use a methodical performance review (appraisal) process that fits your business culture, keep the process simple and execute the process brilliantly. Then you'll better grow your business.

existing team.

Why do they take performance reviews and talent management so seriously?

1. The energy and motivation for the work people do increases when performance reviews are taken seriously.
2. There's also less shirking, skiving and dodging the work.
3. High calibre people stay longer rather than join competitors when they know their talents are taken seriously.

Kate Holt, UK People Director at KPMG clearly understands the connection:



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**Performance Reviews – A serious pause for thought**

***“I need to develop this individual, them prospering in their career will make us prosper as an organisation.”***

**But how do you feel about performance reviews?**

Does anyone really relish the idea of appraisals or performance reviews?

Mostly, no.

Mostly because appraisals fail to work well.

And appraisals mostly fail to work well because they aren't taken seriously enough by leaders and managers.

Employees know they're not taken seriously when:

- The diary time for reviews gets moved because of other pressing issues
- The actions agreed in the review are never referred to again after the review
- Training needs and other commitments fail to be delivered

Are you guilty of any of these?

What happens when employees give up on performance reviews and view them with quiet scepticism or intense cynicism? It can't be good for your business.

**A serious pause for thought...**

Once or twice a year school students are given pause for thought, they have a time-out. They are handed their school report to share with parents.

Within a few days these parents, teachers and school kids come together to review progress and agree on plans for improved performance. The time for the reviews is non-negotiable.

Schools treat school reports as a vitally important part of the progress of every student.

Should it be any different in your workplace?

Of course the schools' results are determined by the students' performances. Each student's report is an opportunity for both the student and the school to prosper.

Isn't it the same in your business?

Your business results are determined by your employees' performances.

Treat performance reviews with the seriousness of a school report rather than just going through the motions – you'll then help your people to grow and help your business grow too.

**NB** You don't need to ask the parents of your workers to get involved!

**Grow your people...**

You can help improve your people's skills, knowledge and abilities in stronger performance reviews. Discussing goals, behaviours, results and how to improve them helps grow your people.

**Make performance reviews work fruitfully for you...**

Implement brilliantly.

Marc Effron and Miriam Ort both have a lifetime invested in the science of talent management. They have worked with and advised household names like Avon Products, IBM, American Express and more.

Their experience and the science they have uncovered says that:

***“Only implementation matters.”***

Effron and Ort have proved that complexity is the enemy of implementation.

***“By eliminating complexity and adding value, we help convince managers that these simple, easy-to-use practices will help them manage better with less effort.”***

**Keep it simple...**

A successful performance review is a balance between complexity and value.

***“...removing complexity from a talent process helps to ensure that the manager uses it, adding value helps ensure he or she uses it the right way.”***

Download the Business Bitesize tools for a simple but valuable performance review or appraisal form using the key insights from Effron and Ort. You can then make it work for your specific business.

**First hand experience...**

A business we know flipped from a more complex 3-page review process to the one pager in the tools accompanying this Bitesize report. One team-member said:

***“The simplicity of the review form made for a better conversation this time. I'm clear on what's expected of me now. The previous (more complex form) meant I was never sure what was expected of me.”***

**Threat or opportunity?**

Both.

Depends what you do next.

Performance reviews managed badly (or not at all) will undermine your business results.

Performance reviews managed well will underpin greater future performance. How come? Because when your people get better at what they're doing, your business will get better too.

When you treat appraisals as a key driver of business success you'll be driven to help your people grow.

When your people grow your business will grow too.

## TIME TO DISAGREE

**“I can’t see the point of formal appraisals in a small team. Plus we don’t have anywhere to have the appraisal meetings.”**

In a small team everyone plays a crucial role. Because everyone is crucial, everyone needs to perform well and, if they can, get better too.

Who wants to be left in the dark about how well they are doing?

If anything, an annual or bi-annual performance review could be the making of your small team.

You make every appraisal more meaningful when you hold them off-site – lots of evidence points to the importance of a setting change when you want people to think differently. A café or hotel foyer can work well or you could hire a room if you prefer.

**“Can appraisals for manual labourers work?”**

For sure any appraisal process must suit the culture of your business.

For example, Timpsons, the cobblers, heel bar and repairs retailer has been successful – hundreds of outlets around the country. Each store is like a mini business in its own right.

Many Timpsons stores are staffed by rehabilitated criminals, so their performance reviews will be very different from those at American Express. However, simplicity is universal, as the research suggests, so why not download the simple but valuable performance review form in the tools and work out what to change to suit your business.

Find out more about Timpsons’ story in the Bitesize tools.

**“I’m a novice at this – I’m not sure how to make appraisals work.”**

Very few people have received training on appraisals. So let your people know you’re a novice but that you want to take them seriously. They’ll respect you for being straight with them.

Then use an appraisal or performance review form as the ‘agenda’ for your performance conversation.

Giving yourself plenty of time will also take the pressure off – avoid trying to cram in too many appraisal meetings in one day. You don’t want to feel under pressure to finish an appraisal off for another one about to start, you could upset both.

**“I think it’s too late for us. There’s too much cynicism from both management and staff. Is there any way back from this?”**

If as a business leader you’re convinced about the value of performance reviews you must get wholeheartedly involved in every review until they become embedded in your business.

When you work alongside every manager and every worker through the appraisal process you’ll send a message. You’ll also learn an awful lot about the way the process must change and about your managers’ approach to appraisals. You’ll also find out who in your workforce you should be closer to and investing more time with.

If it’s as challenging as the question suggests, it seems you have little choice but to get fully involved if you’re committed to sustainable success.

### Tell me more

We love the simplicity and practicality proposed by Efron and Ort in their book – One Page Talent Management.

We hope we’ve tempted you to take talent management more seriously in your business.

If we have, please check out this practical and inspiring book. And why not download the supporting tools and resources for this edition of Business Bitesize?



## 4 helping hands for you...

You know your business performance will improve when the skills, knowledge and abilities of your people improves.

For your people’s skills, knowledge and abilities to improve you need to take talent management seriously and repeatedly help your people improve.

Apply a wholehearted commitment to performance reviews, rather than a half-hearted ‘if-I-must’ approach. You’ll then be on the road to improving the skills, knowledge and abilities of your people and the results of your business too.

Here are four helping hands to get you going with committed performance reviews:

1. Use a simple appraisal form, one you and your people can embrace
2. Be seen to seriously give performance reviews your full wholehearted attention
3. Make performance review time non-negotiable time in your diary
4. Make your appraisal form and process suit your business culture

**ULTIMATE ARGUMENT:** “How will I know our new performance review process works and delivers results for my business?”

Anxious scepticism or even foot-dragging cynicism will no longer be the way your best people feel towards performance reviews.

You’ll experience uplifting review conversations with your best people and constructively accountable conversations with the others.

**STOP:** treating annual or bi-annual appraisals as a necessary evil you’d prefer not to do.

**START:** by seeing appraisals as a critical moment of opportunity for each of your team members and for your business.

**Your reputation as a value added accountant really matters.**

This reputation is at risk unless you share high value business breakthroughs with your clients and contacts. Business Bitesize can help you do this. You can also become the only accountancy firm doing this in your area. Find out more here...

[www.businessbitesizeforaccountants.com](http://www.businessbitesizeforaccountants.com)

**Your feedback is important to us.** We’d love to know what you think of Business Bitesize. Click on this link [here](#) to give us your feedback and answer a single question.

And of course, if you’d like to share this report directly with any of your colleagues, friends and contacts ... feel free.



## Your next steps:

It pays to brilliantly implement a regular performance review process with your people.

It's a source of future growth and prosperity for your business.

Use a simple but valuable appraisal form to sponsor a healthy conversation with every one of your workers.

## Start by seeing performance reviews as a key opportunity for you to improve your people and your business results too.

Pursue simplicity, avoid complexity.

*"By eliminating complexity and adding value, we help convince managers that these simple, easy-to-use practices will help them manage better with less effort."* – Effron & Ort

## More tools and information for you:

As well as the checklist here, you can use the exercises, checklists and tools by downloading the supporting resources.

Together they'll help you make more of this bitesize business breakthrough.

## Click anywhere in this shaded area to see the tools and resources.

These will guide you and your people to treat appraisals as a key driver of business success.

# Make the most of performance reviews and help your people prosper

There's a great deal of science about talent management processes. However, the science only becomes relevant when the performance review or appraisal process is seen as vital to the future success of your business.

Don't let performance reviews become a necessary evil. Make them a critical and non-negotiable part of your business calendar:

### 1. USE A SIMPLE APPRAISAL FORM, one you and your people can embrace

Implementation is critical if you want your performance review process to profitably pay off for your business. You must avoid complexity where possible AND make your performance review a valuable conversation with all your people. Download the accompanying resources for examples, stories and further insights.

### 2. Be seen to seriously give performance reviews your full whole-hearted attention

Just like you'd give your child's school report your full attention because you want them to have a bright future, do the same with your workforce.

### 3. Make performance review time non-negotiable time in your diary

Your team will know you're serious about their progress when performance review times are agreed in advance and never changed.

### 4. Make your appraisal form and process suit your business culture

Timpsons is different from American Express, which is different from our accountancy firm and we're different from IBM. Yes keep performance reviews simple AND tailor them to your business culture.

**For further details on these four valuable insights and more, please visit the tools in the link below.**

**YOUR SUPPORT TOOLS ARE HERE:** Go to the link below and you'll find a selection of practical support tools to help you work out how to make the most of simple and valuable performance reviews.



Find the support tools to help you here - [www.businessbitesize.com/remarkable\\_practice](http://www.businessbitesize.com/remarkable_practice)





## Your business grows when you help your people grow...

- How many pages does your appraisal or Performance Review form have?
- What are the motivational drawbacks of postponing a Performance Review?
- How do you inspire your people to deliver more for your business?

### CONTENTS:

1. **The one Performance Review question you ask if you are serious about growing your people this year, next year and the year after that...**
2. **A Simple Performance Review Form**
3. **Performance Review Exercise -**  
games to expose the truth about your performance review process.
4. **High Performance Review Checklist**
5. **The Timpson Story**
6. **What do your people really think? -**  
true stories of employees' previous experiences of appraisal processes.
7. **The Book** – 'One Page Talent Management' – Marc Efron & Miriam Ort
8. **Appendices**

**STOP** treating the appraisal process in your business as a necessary evil you'd prefer not to do

**START** seeing appraisals as a critical growth opportunity for each of your team members and for your business

### 1. The 'Performance Review' question you ask if you are serious about growing your people this year, next year and every year from now on...

**How does your employee feel if you postpone or reschedule their performance review meeting?**

Where is the value in this question?

The value lies here...

A performance review is an important opportunity for an employee to meet with their manager for some 1-on-1 time. 1-on-1 time to discuss their own work, their thoughts and their goals for the future. An important opportunity you must take seriously.

It's arguably one of the most important opportunities to help your people grow and help your business grow.

Unfortunately, the following activities typically take place in the run up to a performance review:

- a. A date is made in the diary.
- b. A performance review form is filled in by the employee.
- c. The employee feels a degree of anxiety.
- d. Two days before the date of the review you postpone the meeting with the employee because something 'more important' came up.

**Warning:** If you ever cancel or postpone 1-on-1 time with your people you are leaving them...

**'all dressed up with nowhere to go'**

How will your employee feel at the next performance review time - **important, valued and energised?** Or will they feel **overlooked, demoralised and demotivated** about the performance review process?

## 2. A Simple Performance Review Form

### Brief instructions for completing a simple Performance Review Form

**N.B. In Appendix A you will find an example of a one-page performance review form that you could put to work in your business straight away**

#### a. Define the goals...

*The goals must be simple and motivational for both employee and manager*

A motivational goal must be specific and challenging and can be arrived at by the simple test. It is specific (S), it is important (I) to both the individual and the business, and it can be easily measured (M).

#### b. How many goals?

*Focus on just a few goals*

Research on the brain supports the idea of limiting the number of goals to 3 or 4.

If the goals are really important (challenging and significant to the business and the individual) it is unlikely that someone can cover more than four over the course of a year.

#### c. Who sets the goals?

*You set employees goals*

Against one's own intuition, research has shown that a manager's explanation of the rationale or importance of a goal is equally as effective as an employee setting their own goals.

It ensures that the goal is focused on the overall business aims but the manager must ensure that they have the employees buy in.

Participative goal setting (where the employee sets their own goals) actually adds complexity to the process without providing any measurable benefit.

Once these goals are set you must give frequent feedback, not just wait till the next review.

Performance Management Plan		Firms Name
Name:	Manager:	<b>GUIDELINES</b>
Job Title:	Review Date:	• Keep it simple • Focus • Ensure understanding
Describe the performance goals for the next six months (in order of priority)		
1	Goal	How will this be measured:
	Results	
2	Goal	How will this be measured:
	Results	
3	Goal	How will this be measured:
	Results	
4	Goal	How will this be measured:
	Results	
In BOX A, describe the two behaviours that are most critical to enable you to achieve these goals above. In BOX B describe how you will develop these behaviours:		
BOX A	BOX A	
BOX B	BOX B	
What additional support do you feel may be necessary to enable this to happen: Agreement for 'training/learning' time. Regular meeting time with Paul for prioritisation and edition planning		
Summary Rating	Further comments	
Date next appraisal set for		



## High Performance Reviews

Support tools and resources

**Frequent feedback increases the performance of ANY employee in line with their well-designed goals**

**Action:**

At the time of the performance review, set dates in your calendar and your employee's calendar to revisit the goals – ideally every quarter.

Keep these dates as sacrosanct and your employees will get the message that you and the business are taking their progress and development seriously.

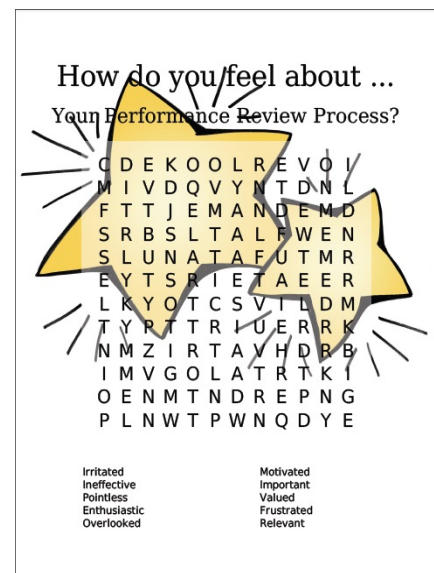
### 3. Performance Review Exercises and Workshops...

A simple game to play at coffee break with your team that will tell you all you need to know about your performance review process.

**N.B. Appendix B - you will find a word search that you can do with your team.**

During a coffee break or team meeting:

1. Give every person a copy of the word search.
2. Ask them not to put their names on the sheet.
3. Request that they circle 5 of the words that most accurately reflect how they feel about this performance review system and find them in the word search.
4. Collect the word searches in, score them using their scoring system and then decide if your Performance Review needs a performance review!



#### A workshop for business leaders to run with their people.

You are going to ask your people about their views are on the current performance review process you have in place in your business.

Ask them to complete the four multiple choice questions below and then hand in the papers to you. **N.B. there is a ready-made form to print out in Appendix C for this job.**

1. Does the performance review process put a spring in your step?
  - a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never

2. Does the performance review process make you feel positive about your future within this business?
  - a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never
  
3. To what degree does the process support your personal goals at work?
  - a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never
  
4. How often do your performance review meetings get cancelled, postponed or interrupted?
  - a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never

Collect in the sheets and use the scoring sheet in Appendix C to see how the performance review process in your business is shaping up.

**Ask yourself “Is it time to change the appraisal/performance review process in your business?”**

### A workshop to run with business leaders.

You are going to ask the room about their views on the current performance review process they are operating in their businesses.

Ask them to complete the four multiple choice questions below and then hand in the papers to you. **N.B. there is a ready made form to print out in the appendix D for this job**

1. Does the performance review process put a spring in your step?
  - a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never
  
2. Does the performance review process make you feel positive about the future of your business?
  - a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never
  
3. To what degree does the process support the goals of the business?
  - a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never
  
4. How often do you cancel, postpone or interrupt performance review meetings in your business?
  - a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never

Collect in the sheets and use the scoring sheet in the Appendix D to see how the performance review process in your business is shaping up.

**Ask yourself is it time to change the appraisal/ performance review process in your business ?**

### 4. High Performance Review Checklist.

#### Why it so valuable to your business?

- 1. A maximum of four goals:** The employee should be able to retain what their goals are without having to recheck the document a week, a month or 6 months later. Fewer goals will receive more focus each and have a stronger likelihood of a positive outcome for the employee and the business as a whole.
- 2. Specific goals:** eg. 'Get this project completed by a *specific date*' as opposed to 'move this project on'. There is no ambiguity – Has the task been completed within the timescale? The answer is either yes or no. Has the project been moved on? Yes/no/maybe? ... the question 'has it moved on' is a matter of opinion not a matter of fact.
- 3. Important goals:** What are the goals for the business as a whole? Goals that are set with an employee must be driven by the business's goals. That means that when any individual achieves a goal, they are incrementally moving the business forward as a whole.
- 4. Measurable goals:** If you cannot answer the measurable question (has this goal been achieved?) with a 'yes' or a 'no' then the goals are not specific enough and are not directly measurable. They must be clarified against both objective **and** time.
- 5. Commit to transparent and frequent feedback:** If people are committed to a goal, they will enhance their efforts if they learn that achieving the goal is in jeopardy. They will only know if the goal is in jeopardy through frequent and honest feedback. The goals must be well set and the feedback must be delivered sensitively.
- 6. Accountability:** There must be a system in place to hold managers accountable for the completion and participation in the appraisal process. By far the best approach is if the MD acts as a role model in this process. If the MD can find time to do performance reviews it becomes increasingly difficult for all other managers to not participate.

**Now checkout how Timpson Shoe Repairers put this checklist to work in their business in the next section of these tools.**

### 5. The Timpson Story

Have you ever been into a Timpson shop?

Timpson is a family business that is turning over more than £200M and making profits of in excess of £10M. Not only that but 10% of their workforce have been recruited straight from prison.

You could be forgiven for thinking it is an independent shop run by a small tight knit team. In fact you'd be right, but it's also one of 1400 retail outlets and that small tight knit team is part of a team of 3500 people.



Timpson offer a shoe repair and key cutting business under the strapline 'Great Service by Great People'.

The Timpson family approach to business has turned more orthodox management styles on their heads (literally). Here's how John Timpson the current CEO describes the key elements of his approach to management at Timpson...

### A QUICK OVERVIEW

- AIM TO BE THE BEST
- ENJOY CHANGE
- VISIT THE BUSINESS
- KEEP LOOKING FOR IDEAS
- SHOW LEADERSHIP
- WIN HEARTS AND MINDS
- WEEKLY NEWSLETTER
- NO SECRETS
- UPSIDE DOWN MANAGEMENT
- AMAZE OUR CUSTOMERS
- OBSESSED WITH OUR PEOPLE
- PICK GREAT PEOPLE
- NO BIG SHOTS
- NO HEAD OFFICE
- NO POLITICS
- NO CHEATS, NO DRONGOS
- GREAT PLACE TO WORK
- THE BONUS SCHEME
- TRAINING
- BE FAIR
- KNOW YOUR PEOPLE
- LIFE LONG EMPLOYMENT
- SUPPORT PEOPLE IN TROUBLE
- PRAISE
- CHARITY
- CELEBRATE SUCCESS
- HAVE FUN
- FAMILY BUSINESS

Previous




View Again

John Timpson current CEO has heralded an 'upside down management' style.

Embedded within this approach are the same key elements of an effective appraisal system that grows its people in order to grow its business.

Staggeringly **simple measurable** goals, goals that are **important** to the growth of the business and set in a framework of **transparency** and **accountability**.

Every team in every store is free to run their own branch in the way that they feel is best with their sales target being their one and only goal. They do this with the *help and support only* of the senior levels of management.

The area and senior management don't dictate what or how people should be doing in their branches. That's up to them. The branch teams are actively engaged in a process of 360 degree feedback with their area managers – the company has a policy of *no secrets*.

### The only goal that is set for the branch ...

Total cost of all wages in the branch x 4.5 = Sales Target

- Simple? ~~Yes~~
- Important to the business? ~~Yes~~
- Important to the employees? ~~Yes~~
- Measurable? ~~Yes~~
- Accountability of managers? ~~Yes~~
- Transparent? ~~Yes~~

Check out their website, in particular check out the 'About' section headed up 'Magic Dust' <https://www.timpson.co.uk/about/magic-dust>

John Timpson and his teams know that looking after, nurturing and growing your people is the answer to growing your business.

Each and every colleague at Timpson are in no doubt as to their importance to that company.

Valued, supported, developed and allowed to grow, it's unsurprising that loyalty, retention and colleague satisfaction are not an issue in this business.

### 6. What do other people really think about their review or appraisal process?

Examples of employees' previous experiences of performance review processes

**Question:**

What would your managers or other employees in your business say about your appraisal system?

**A former employee of a multi-national information services company said:**

"Our managers did not receive their bonus unless they had carried out all the performance reviews".

"We all knew that and we knew that our company was serious about the reviews taking place".

**A former employee of a manufacturing company said:**

"My appraisal meeting was always in my manager's office and it was constantly interrupted - rather my manager permitted the interruptions, took phone calls and didn't have a do not disturb sign on the door."

"I'd spent a lot of time filling in my appraisal form and it made me feel that I wasn't important at all to either my manager as a team member or the business as a whole"

**A former employee of a large construction firm said:**

"After three postponed meetings I eventually had my appraisal. By the time I had the appraisal the work I had done to prepare for it was out of date so I had to redo a lot of it."

"None of the training needs from previous years had been followed up on by HR and after the first year I just felt it was a complete waste of time that no one cared about. "

"My manager didn't hold any value in the information in the form and just saw it as a thorn in his side"

**An existing employee of a global data science business said:**

“We have two or sometimes three appraisals a year. Any training needs that are agreed and approved are then our own responsibility to make happen.”

“I like this approach as it enables me to fit my training around relevant projects and stay in control of my own time management. I feel that by doing this my company get good value for the training I receive as it is timely and relevant”

“I used to have too many goals and objectives on my appraisal form but I have reduced to less than ten now and it makes it much easier to stay on track with all of them. We are all comfortable in our company to give full 360-degree feedback to our managers and it is a no-blame culture. It really feels that we can develop in a way that the company gets real value from. I like the appraisal system we have.’

**TAKE ACTION:** Try out the exercises in Section 3 to really see what your business is gaining from the Performance Review Process

### 7. The book:

#### **'One Page Talent Management - Eliminating Complexity, Adding Value'**

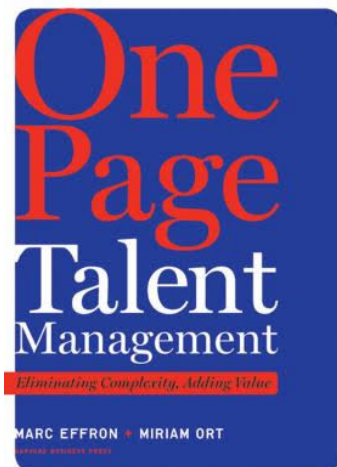
**Marc Effron & Miriam Ort**

We love this brilliant book 'One Page Talent Management - Eliminating Complexity, Adding Value' by Marc Effron & Miriam Ort.

Based on the hands-on experience of both authors working with businesses such as American Express, Pepsi and Avon, Effron and Ort introduce 'One Page Talent Management (OPTM)' a simple and powerful approach that accelerates (significantly) a company's ability to grow its people and produce better leaders.

OPTM shows how to:

- ✓ quickly spot high potential talent without complicated and long-winded assessments
- ✓ increase the numbers of 'waiting in the wings' successors for key roles
- ✓ generate 360-degree feedback that accelerates change in the most important behaviours
- ✓ fast track the time for managers to implement talent processes
- ✓ enforce accountability for growing talent



### Appendix A

Performance Management Plan		Firms Name	
Name:	Manager:	<b>GUIDELINES</b> • Keep it simple • Focus • Ensure understanding	
Job Title:	Review Date:		
Describe the performance goals for the next six months (in order of priority)			
1	Goal	How will this be measured:	
	Results		
2	Goal	How will this be measured:	
	Results		
3	Goal	How will this be measured:	
	Results		
4	Goal	How will this be measured:	
	Results		
In BOX A, describe the two behaviours that are most critical to enable you to achieve these goals above. In BOX B describe how you will develop these behaviours:			
BOX A		BOX A	
BOX B		BOX B	
What additional support do you feel may be necessary to enable this to happen:			
Summary Rating		Further comments	
Date next appraisal set for			

**Appendix B**

**Word Search Activity**

How do you feel about ...  
Your Performance Review Process?

C	D	E	K	O	O	L	R	E	V	O	I
M	I	V	D	Q	V	Y	N	T	D	N	L
F	T	T	J	E	M	A	N	D	E	M	D
S	R	B	S	L	T	A	L	F	W	E	N
S	L	U	N	A	T	A	F	U	T	M	R
E	Y	T	S	R	I	E	T	A	E	E	R
L	K	Y	O	T	C	S	V	I	L	D	M
T	Y	P	T	T	R	I	U	E	R	R	K
N	M	Z	I	R	T	A	V	H	D	R	B
I	M	V	G	O	L	A	T	R	T	K	I
O	E	N	M	T	N	D	R	E	P	N	G
P	L	N	W	T	P	W	N	Q	D	Y	E

Irritated  
Ineffective  
Pointless  
Enthusiastic  
Overlooked

Motivated  
Important  
Valued  
Frustrated  
Relevant



## Appendix C

### A workshop for business leaders to run with their people: question set and scoring sheet

1. Does the performance review process put a spring in your step?
  - a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never
  
2. Does the performance review process make you feel positive about your future within this business?
  - a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never
  
3. To what degree does the process support your personal goals at work?
  - a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never



## High Performance Reviews

Support tools and resources

4. How often do your performance review meetings get cancelled, postponed or interrupted?
- a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never

### Scoring system:

Q1. a = 8, b = 4, c = 0, d = -4, e = -8

Q2. a = 8, b = 4, c = 0, d = -4, e = -8

Q3. a = 8, b = 4, c = 0, d = -4, e = -8

Q4. a = -8, b = -4, c = 0, d = 4, e = 8

Tally up the scores for the four questions...

Score of between 24-12 – your performance review system is well regarded and serves the goals and needs of the business and your people

Score between 12 and 0 – your performance review system is not doing as good a job as it could be for your people and your business

Score between 0 and -12 - your performance review system is failing to meet the needs of your business and it will not be growing your people either

Score between -12 and -24 - there is little or no engagement with your performance review system from your employees or management. It's time for a shake up!

## Appendix D

### A workshop to run with business leaders: question set and scoring sheet

1. Does the performance review process put a spring in your step?
  - a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never
  
2. Does the performance review process make you feel positive about the future of your business?
  - a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never
  
3. To what degree does the process support the goals of the business?
  - a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never



## High Performance Reviews

Support tools and resources

4. How often do you cancel, postpone or interrupt performance review meetings in your business?
- a. Always
  - b. Mostly
  - c. Sometimes
  - d. Rarely
  - e. Never

### Scoring system:

Q1. a = 8, b = 4, c = 0, d = -4, e = -8

Q2. a = 8, b = 4, c = 0, d = -4, e = -8

Q3. a = 8, b = 4, c = 0, d = -4, e = -8

Q4. a = -8, b = -4, c = 0, d = 4, e = 8

Tally up the scores for the four questions...

Score of between 24-12 – your performance review system is well regarded and serves the goals and needs of the business and your people

Score between 12 and 0 – your performance review system is not doing as good a job as it could be for your people and your business

Score between 0 and -12 - your performance review system is failing to meet the needs of your business and it will not be growing your people either

Score between -12 and -24 - there is little or no engagement with your performance review system from your employees or management. It's time for a shake up!

### Appendix E

#### Key phrases to ensure you run a great appraisal and finish the appraisal on time:

**IMPORTANT:** The suggestions below are to be used in connection with the appraisal process recommended in the Business Breakthrough report about 1-page appraisals.

#### Starting the appraisal

- An opening framing statement to ensure you start on the right footing
  - o *“I’ve prepared for the appraisal by populating the appraisal form, however it’s important that you shout out, challenge and question the content of this appraisal form. This appraisal is for you, it’s a time-out from normal work, it’s about you and your role and should help you feel proud of the work you do.”*
- Avoid starting the appraisal with a negative such as “I’m sorry I haven’t done a few things and have held you back”. Always start using the framing statement above and then go on to signpost how the appraisal will be structured
- Share the structure of the appraisal
  - o *“Let’s have a quick look at the successes last quarter”*
  - o *“Let’s run through my thoughts and your thoughts on the next quarter”*
  - o *“Let’s get clear on the numbers we’ll measure in order to direct ‘week-in-week-out’ action on each of your work priorities”*
- Get going describing the main priority – adapt these phrases to reflect the nature of the primary work done (client care) by your team member and how that work gets done (client meetings and calls). Then describe why this is so important.
  - o *“I see your main priority as client care which shows up as work in client meetings and client calls”*
  - o *“It’s the main priority because of the value of work it brings the firm and because of the importance of client care to client loyalty”*

#### Stimulating healthy and constructive discussion during the appraisal

- Use open questions to stimulate healthy discussion – What; When; Where; How; Who; Why – avoid questions that result in a ‘yes’ or ‘no’ eg “Did you get the result you want?” as it stalls a conversation and creates challenging pauses
- To help, prepare open questions for each section of the appraisal form in advance of each appraisal – use the open questions about the 4 priorities, the numbers that can be used and about the two skills improvements



## High Performance Reviews

Support tools and resources

- Look for specifics not generalities. You'll hear team members say things like *"I will be more focussed on client care this next 13 weeks"*. Ask them what EXACTLY do they mean by customer care. Ask them what SPECIFICALLY they will do to be better at customer care.
- Work with your team member to get priority work time allocated to their weekly diary habits and routines – time for emails – time for project work – time for client calls
- Each part of the conversation is designed to ensure the team member is happy about the focus of each priority and that the conversation results in agreement on the input and outcome KPIs for each priority section
- When a team member asks a question have a go at re-stating their question and seeing what they say to elaborate on their question

### Concluding the appraisal

- Share an overview summary of the priorities agreed
- Ask how proud they'd be or how they'd feel in 13 weeks having achieved what's on their form
- Thank them for making the discussion today a success