

## Factors for a successful appraisal review

### *Essential factors for a successful appraisal review*

- **Before the meeting:** Reflect on the different roles of the people involved, the overall goals of the meeting, the structure and level of the conversation, and the primary topics to be discussed. Make sure to at least briefly outline the most important points in writing.
- **During the conversation:** Maintain an attitude of appreciation and try to be objective -> aim for a conversation between equals -> employ active listening and avoid interrupting your partner (aim for a dialog, not a monolog)
- Address all important topics, even if they are uncomfortable -> keep the conversation open, honest, and confidential -> express criticism in a clear but constructive manner
- Helpful feedback: Use specific examples to illustrate your arguments (critical incidents); avoid personal attacks ("You are incapable of doing your job") and instead use descriptive "I-statements" ("I've noticed that...") and specific comments and expectations ("You could improve your performance in this respect if you...;" "I expect you to...")
- **At the end of the meeting:** Write down the most important results of the conversation, the performance targets you've agreed upon, and any training programs deemed necessary
- **After the conversation:** Make sure that the steps that have been agreed upon are taken; monitor implementation/milestones

### *Other important factors*

- **Preparation:** Agree on a suitable date early enough, so that both partners have time to prepare -> make sure to clarify the expectations of each of the partners regarding the conversation -> allow enough time for the meeting (at least one hour, with ideally up to one hour of additional time available if necessary)
- If there is a conflict or an especially tense situation involving an employee, staff members in management positions can take advantage of WU's coaching services and prepare for the conversation with an experienced "sparring partner" (coaching is also available in single-session format)
- **During the conversation:** Start on time, hold the conversation in a pleasant, quiet environment, make sure that there are no interruptions
- Address the strengths and weaknesses of the other person, accept criticism -> create opportunities to compare and verify self-perceptions and perceptions of the other
- Allow emotional outbursts to happen -> keep calm, listen, and give the other person enough time
- Clearly state your personal feelings and objectives (What do you want? Don't focus only on what you don't want) -> allow your partner to state his/her personal feelings and objectives