

BEST PRACTICES FOR PERFORMANCE APPRAISALS



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INTRODUCTION

When it comes to performance reviews, in recent years it has become obvious that there really isn't much to enjoy about the process. An hour-long conversation is surrounded by hours of admin for manager and employee. HR teams produce and track non-compliance reports and the whole process is an organisational chore that goes on for months. Even the messaging around the value of performance management feels like a repetitive task without any real insight.

But now, with the latest LMS tools, we are looking to a future where end-of-year performance appraisals are just a part of the story. Where looking back over the year is an insightful and valuable experience, made easy by objectives and

progress tracking. Where lessons are learned, achievements are recognised and ambitions are solidified. Where context is king and everyone involved can see the benefits of this step in the learning journey. Because it is just that: one step. One of many times learners pause for thought and reflect on their development. Turning performance appraisals from an annual to a continuous activity is made easy with LMS.



BUILDING A CULTURE OF CONTINUOUS PERFORMANCE DEVELOPMENT – IN SEVEN STAGES

A. The building blocks

Set up your process effectively based on goals and competencies, so that clear expectations are set for each individual. Not only will this aid focus, but it will provide a sense of achievement through the appraisal process.

1. Set and track goals. Every employee should have their own individual learning goals. These should align to the goals of their team, their department, and the organisational goals, in turn. Success should be measured against achievement of both individual and company goals. You can connect high-level company goals to personal goals using Totara Learn's flexible tiered approach. Performance management based on both personal and business goals is an excellent motivational and engagement tool.

2. Build competency-based performance measurement. A competencies-centred approach to performance management provides focus for training and development goals. Competencies take the guesswork out of the necessary skills required for each job role – now and for future career progression. Use your LMS to assign competencies to job roles; you can then build and review individual training plans against these competencies.

B. The appraisal process

The actual process of carrying out the year-end review should be an organisation-wide effort, with appropriate leadership support. However, it should focus on recognition, achievement and future goals – rather than administrative effort. Refresh yourself on the basics of the appraisal process in this guide from ACAS.

3. Gather feedback. Feedback is an essential part of any assessment. Helping to understand where things have gone well, and what could be improved, is a vital part of understanding the progress we are making. Alongside feedback collected during training courses, 360 feedback with Totara Learn allows a range of peers, team members and managers to contribute to the overall performance review.

4. Assess skills gaps. Regular training needs analysis should be carried out ahead of training programmes. Focus on addressing any pre-existing skills gaps, as well as identifying new



areas based on development goals, during the appraisal. Afterwards, use your LMS to assign relevant course materials to fill these skills gaps.

5. Make the appraisal admin easy. There is no need for time-consuming paperwork. There should be a written record of the discussion, but the power is exactly there - in the discussion. Keep your appraisal notes together with individual goals on your LMS. Make the appraisal process easier by creating checklists, assigning forms and defining stages. Totara Learn allows you to monitor progress throughout the performance management process.



C. Focus on the future

Every step of the performance management process should be forward-looking. Build momentum through ongoing tracking of personal development planning and behaviour change.

6. Create a personal development plan. The output from an appraisal should include a detailed forward-looking development plan. Use your LMS to create a personal learning plan, linking goals with competencies and associated courses. Totara Learn allows you to map and assign competencies, connecting courses to competencies to automatically populate learning plans. Individuals and managers should then together monitor and review these development goals throughout the year. Managers can regularly track their team's performance using the LMS reporting functionality.

7. Embed continuous development behaviours. Performance management is a process – not a one-off activity. This requires cultural and behavioural change: managers need to be held



to account to ensure they are leading by example. They should set up monthly development discussions, based on goals instead of tactical objectives. Notes should be kept of monthly meetings within the LMS so that the annual discussion is a natural conclusion to the year. Organisations should also use their eLearning authoring tools to create regular challenges to embed reflective behaviour: for example, a quick challenge using the LMS social platform to acknowledge what you achieved this month. This will encourage momentum and a continued focus on goals.

Nobody wants to be surprised in a performance review. If this is the first time an issue is being addressed, it's too late: engagement and performance will already be negatively impacted. Similarly, we don't like to feel that we are wasting our time. For managers, the admin surrounding end-of-year appraisals can be overwhelming. For the individual, they can feel lost in the process. To counter all of these possible negatives, an approach where performance review is an ongoing discussion has a huge impact on successful completion of goals, engagement and personal career ambition and growth.

It's not going too far to say that a regular monthly development discussion has benefits for wellbeing; a manager that demonstrates they care for an individual builds a strong and meaningful relationship. All of this is made easier by accessing the right learning tools at your fingertips. A detailed step-by-step guide to getting the best out of your performance management process through Totara Learn can be found

here. Don't get left in the dark past, where appraisals were a blight on the end of the year. Bring your employees into a process of continuous review, support and autonomy around their own development.

If you'd like to learn how Webanywhwere could help you implement or improve e-learning within your organisation please contact us at info@webanywhere.com

