WOLFFKRAN

TESS Group

# Business Sustainability, Well-being & Performance Course Suite

## Workshop 5: Appraisal Skills

matrix quality standard for information advice and guidance services approved by the matrix Accreditation Body

TESS 10 CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# House keeping

WOLFFKRAN

Toilets

Timings

Mobiles

COVID-19

Open forum

Having fun is important

Your action plans

Notes

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# This programme

WOLFFKRAN

**Workshop 1**: Communication, Feedback & Coaching

**Workshop 2:** Well-being & performance at work

**Workshop 3:** Emotional intelligence

**Workshop 4:** Strategic Decision Making, Planning & Commercial Awareness

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# This programme

WOLFFKRAN

- Selection of leadership & management workshops (1 per month)
- Personalised action plans
- 121 coaching/mentoring with Tess Group

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Introductions

WOLFFKRAN

CELEBRATING 10 YEARS

# OUR MISSION

*What is the purpose and objective of WOLFF-KRAN? Our reason for being, here and now?*

Our mission for more than a century:
To design, manufacture and deliver the most comprehensive fleet of high quality lifting solutions for landmark developments, motivated by a desire to work with our partners and build a better world.

# OUR VISION

*What do we want to achieve long-term? Where and how do we see our company in the future?*

WOLFFKRAN – The leader of the pack in innovation, safety, and reliability; the only right-choice for tower cranes around the world.

ıance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

## PIONEERING SPIRIT

We seek opportunities to face new challenges and develop innovative solutions through creative thinking.

We learn from mistakes and do not allow the fear of failure to distract us from leading in our industry.

## CUSTOMER ALWAYS FIRST

Our priority is our customers.

Wherever, whenever, and whatever it takes, we simply deliver and rise to their expectations.

## WORK SMART, FEEL GOOD

We work smart and deliver with tenacity, constantly seeking to improve on best practice.

We celebrate high performance and achievement amongst our people, whose wellbeing is the key to our success.

## TRUST

Our company is made up of a diverse group of individuals and together we are one team.

We value and encourage one another and are strengthened by our differences.

## PASSION

We are driven by our passion for delivering the highest quality lifting solutions to help build iconic landmarks around the world; by going the extra mile for each and every one of our customers.

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Confidence poll

WOLFFKRAN

TESS
CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Workshop timings

WOLFFKRAN

**8.30-10.00:** Recap and an introduction to appraisals

**10.00-10.15:** Break

**10.15-11.15:** Challenges, preperation & communication

**11.15: 11.30:** Break

**11.30-12.30:** Questioning, feedback, objectives and ending the appraisal

**12.30-1.00:** Lunch

**1.00-2.30:** Appraisals at Wolffkran and wrap up

TESS CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Define managing performance

WOLFFKRAN

'a process which contributes to the effective management of individuals and teams in order to achieve high levels of organisational performance

It establishes shared understanding about what is to be achieved and an approach to leading and developing people which will ensure that it is achieved'.

*CIPD Factsheet: Armstrong and Baron*

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# What is an appraisal?

WOLFFKRAN

A performance appraisal is a regular review of an employee's job performance and overall contribution to a company. Also known as an annual review, performance review or evaluation, or employee appraisal, a performance appraisal evaluates an employee's skills, achievements, and growth--or lack of.

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Benefit of managing performance

WOLFFKRAN

- Performance measurement - transparent, short, medium, and long term
- Clarifying, defining, redefining priorities and objectives
- Motivation through agreeing helpful aims and targets
- Motivation though achievement and feedback
- Training needs and learning desires - assessment and agreement
- Identification of personal strengths and direction - including unused hidden strengths
- Career and succession planning - personal and organisational
- Team roles clarification and team building

TESS CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Benefit of an appraisal

WOLFFKRAN

- 4 groups
- 10 minutes
- You will be looking at either the benefit for a) the manager/leader b) the staff c) the business d) the customers
- Get back together and feedback

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Benefit of an appraisal

WOLFFKRAN

- Organisational training needs assessment and analysis
- Appraisee and manager mutual awareness, understanding and relationship
- Resolving confusions and misunderstandings
- Reinforcing and cascading organisational philosophies, values, aims, strategies, priorities
- Delegation, additional responsibilities, employee growth and development
- Counselling and feedback
- Manager development - all good managers should be able to conduct appraisals well

TESS CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Benefit of an appraisal

WOLFFKRAN

- Helps improve individual performance
- Helps improve organisational performance
- Motivates employees
- Assists in the delivery of effective care & customer service
- Corrects behaviour
- Develops individual performance
- Improves poor performance
- Helps to understand the people who work for us
- Provides support and encouragement

TESS 10 CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Managing performance

WOLFFKRAN

## Your role

- To complete regular P&DR and supervision/1 to 1 sessions
- To give constructive feedback
- Deal with underperformance
- Enable open and honest conversations
- Share a vision of the future
- Align objectives to divisional and group strategy
- Recognise and celebrate success
- Provide support and encouragement
- Identify gaps in performance promptly and putting actions in place

TESS
CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Appraisal process

WOLFFKRAN

## Process

- Prepare thoroughly
- Give employee time to prepare
- Suitable time and place
- At the start explain purpose and structure
- Review previous objectives
- Offer feedback
- Encourage openness on strengths & weaknesses

## Process

- Be specific on areas of improvement
- Try to identify root causes
- Agree SMART actions
- Discuss objectives for coming year
- Discuss training and development needs
- Aspirations
- Grading
- Next steps

TESS
CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Appraisal

WOLFFKRAN

TESS
CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Difficult conversations

WOLFFKRAN

## The things that hold me back when having an honest conversation are:

| | | | | |
|---|---|---|---|---|
| I fear admitting my shortfalls | I don't know how they will react | I've left it too late | I don't want to present myself as negative | I get anxious about being critical |
| I recall my own unpleasant encounters | I don't want to jump in too quickly | If I say something, I have to do something – I don't have the time | I don't want to create conflict | I don't want to be too picky |
| I don't have all the facts | I never get the opportunity | I don't want to spoil the relationship | I do not have a relationship so feel unable to tell them | I fear a counter attack |
| I don't want to give an impression that I can't do my job | I might be wrong | I'm only going to be told about the bad stuff | They're more senior than me – I can't say it | I fear the consequences |
| | | | | |

TESS 10 CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Difficult conversations

WOLFFKRAN

## Strategy for Handling Challenging Conversations

### Introduction

Set the right tone

### Handling the Emotional Side

May choose to take a moment
Ask questions to explore issues together
Remain calm and professional

### Listen

Listen to what they have to say they may want to let off steam
Keep an open mind and don't jump to conclusions

### Ask

For them to present solutions to resolve any issues
What support they need

### Importance of Rapport

Prepare to demonstrate empathy
Acknowledge their position

### Successful Outcome

What does this look like for you and the other person
How you are and what you say

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.



WOLFFKRAN

# Manager Preparation

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Manager preperation

WOLFFKRAN

01 Confirm in Advance

02 Timings

03 Venue

04 Questions

05 Documentation

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Employee preperation

WOLFFKRAN

01 Job Description.

02 Previous Objectives

03 Achievements.

04 What's gone well

05 Objectives not achieved

06 Performance improvements.

07 Training and development required.

08 Support.

09 Aspirations.

10 Their feedback.

TESS 10 CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Communication

WOLFFKRAN

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Listening skills

WOLFFKRAN

How can we do this?

- Verbal / nonverbal responses such as yes, no
- Nodding
- Note taking

You need to allow your appraisee to firstly process the question and then time to respond and this may take a few seconds. Try not to jump in and give them that time. It helps to:

- Have pre planned questions.
- Concentrate on what is being said.
- Be open minded to anything they say.
- Listen for points that may be avoided.
- Allow them to finish their points before asking further questions.
- Use silence to allow them to elaborate on points.

TESS 10 CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Questioning

WOLFFKRAN

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Questioning – the funnel

WOLFFKRAN

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Feedback in appraisals

WOLFFKRAN

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Importance of feedback

WOLFFKRAN

**01** Increases Motivation

**02** Enhances Performance.

**03** Improves Employee Engagement.

**04** Tool for Career Development.

**05** Tool for Continued learning.

**06** You to Receive Feedback.

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Feedback

WOLFFKRAN

**A** = ACTION

**I** = IMPACT

**D** = DO

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# AID Positive Feedback

WOLFFKRAN

A = 'The way you spoke to that customer was fantastic! You asked amazing TED questions to understand their wants and needs and you clearly listened to them. I know this as you summarised back to them what they said.'

I = 'The impact of this is that they clearly felt valued as a customer and that is important as there is more chance, they will stay loyal to us and buy more products from us – both of which are important to the commercial success of our business.'

D = "Carry on doing this with other customers to as it will enable us to retain more clients and increase profitability and therefor the success of our business.!"

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# AID developmental feedback

WOLFFKRAN

A = "I've noticed that you've been at least 5 minutes late for the past week. I've asked you about this before and you said there is no excuse for this but it is carrying on."

I = "The impact of this is that your colleagues are having to pick up your workload which is putting more stress on them. Also, it is making you look uninterested and undedicated to you job which I know isn't true".

D = "I want you to put your alarm on for 30 minutes earlier tomorrow so that you are on time tomorrow."

TESS 10 CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# SMART goals

WOLFFKRAN

## S – Specific

Who, What, Where, When, Why, Which

Define the goal as much as possible with no ambiguous language.

WHO is involved, WHAT do I want to accomplish, WHERE will it be done, WHY am I doing this (reasons, purpose), WHICH constraints / requirements do I have?

## M – Measurable

From and To

Can you track the progress and measure the outcome?

How much, how many, how will I know when my goal is accomplished?

## A – Attainable

How

Is the goal reasonable enough to be accomplished? How so?

Make sure the goal is not out of reach or below standard performance.

## R – Relevant

Worthwhile

Is the goal worthwhile and will it meet your needs?

Is each goal consistent with other goals you have established and fits with your immediate and long term plans?

## T – Timely

When

Your objective should include a time limit. "I will complete this step by month/day/year."

It will establish a sense of urgency and prompt you to have better time management.

TESS 10 CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# SMART goals

WOLFFKRAN

Verb

What

How

When

Why

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Development plans

WOLFFKRAN

*Reflect on outcomes, evaluate achievements and progress. Review and re-establish future plans/goals*

*Self-assess skills and identify strengths and weaknesses*

*Develop your skills e.g. workshops, online course, seminars, self-study, conferences, mentoring, practice and more*

*Prioritise development needs in consultation with supervisor(s) and develop a plan of action*

**To grow your business, you need to grow your people**

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Ending the appraisal

WOLFFKRAN

- The manager completes a final version of the appraisal form. This should be done immediately after the appraisal meeting when the discussion is still fresh in the mind.
- A copy of the completed form is given to the employee for his/her signature and any comments.
- Where an employee is dissatisfied with the appraisal, he/she is advised of the appeal/grievance procedure. If the employee lodges an appeal/grievance, a meeting is held with a senior manager at which the employee can be accompanied by a work colleague or a trade union representative.
- The completed appraisal form is sent to a senior manager for review, comment and signature.
- The completed appraisal form, signed by the manager, employee and senior manager is placed in the employee's personal file.

TESS CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Skills practice

WOLFFKRAN

- Groups of 3
- 1 manager (appraiser), 1 staff member (appraisee) and 1 observer
- The manager to run the staff member through the appraisal
- Observer watches and at the end, gives feedback
- Each person will have the opportunity to do all three roles
- 45 mins in total
- 15 mins per session

CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Workshop timings

WOLFFKRAN

**8.30-10.00:** Recap and an introduction to appraisals

**10.00-10.15:** Break

**10.15-11.15:** Challenges, preperation & communication

**11.15: 11.30:** Break

**11.30-12.30:** Questioning, feedback, objectives and ending the appraisal

**12.30-1.00:** Lunch

**1.00-2.30:** Appraisals at Wolffkran and wrap up

TESS CELEBRATING 10 YEARS

These slides are for use only on 'Business Sustainability, Well-being & Performance Course Suite – workshop 5' delivered for Wolffkran In March 2021. The slides can be used to refer back to but cannot be used for future learning and development material.

# Wrap up: action plan

WOLFFKRAN

TESS 10 CELEBRATING 10 YEARS