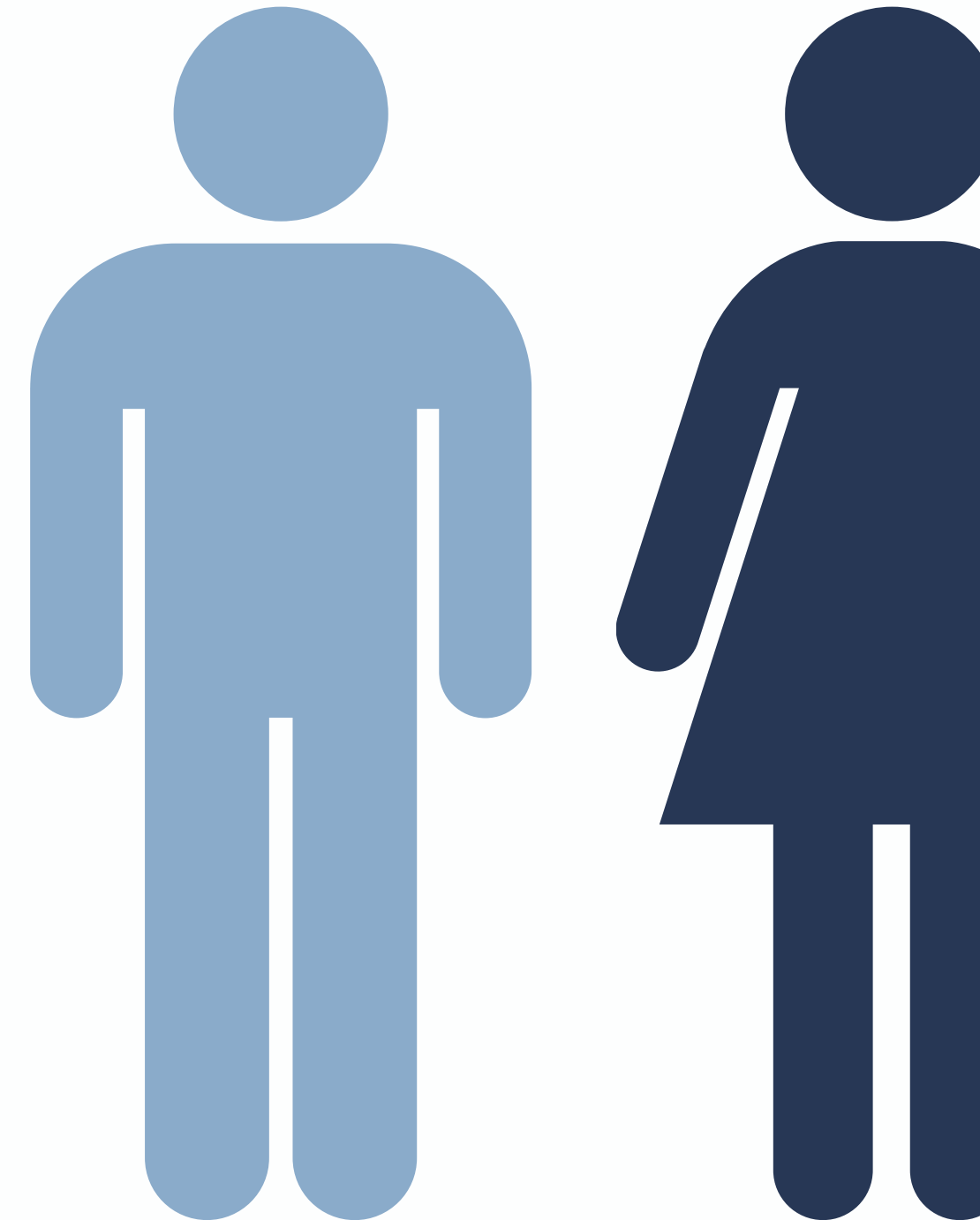
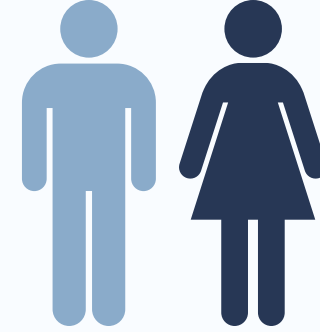


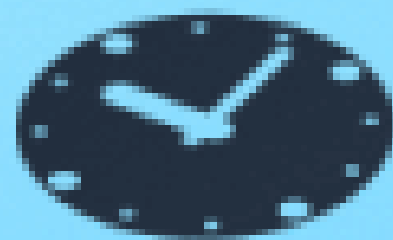
# Practical Step by Step approach to conducting a Performance Review

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**Formal Performance review is an important step in the management of individual and team performance. The review is a coaching/ feedback process that needs to be dealt with discretion in order to inspire and not demotivate.**



**Time for  
Review**

# What is Important During this Review Session?

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## **Ensure that:**

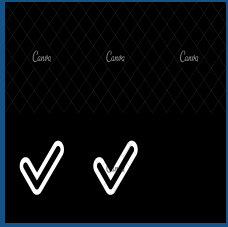
- Feedback is given in an atmosphere conducive to good working relationships and is given with sensitivity and empathy to maximise acceptance.

## **Feedback should:**

- Not be given in an open forum.
- Should be confidential to the person receiving the feedback.
- Feedback should be given behind closed doors
- The person should feel safe and protected from embarrassment in front of peers and colleagues.

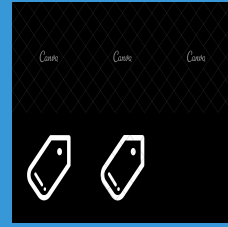
## **Also ensure:**

- The way you give feedback will not leave the person devastated and emotionally unable to perform.
- Always handle the discussion with sensitivity and empathy to maintain and enhance self-esteem.
- Dis-comfortable feelings between you and the staff member will make it even more difficult to reach the required levels of performance.



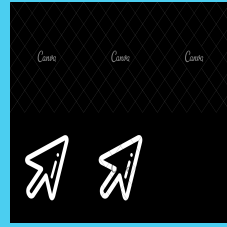
1

OPEN THE  
DISCUSSION



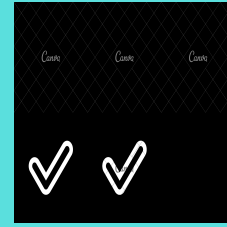
2

COMPARE  
ACTUAL VS  
PLANNED  
PERFORMANCE  
RESULTS:  
DISCUSS  
SUCSESSES



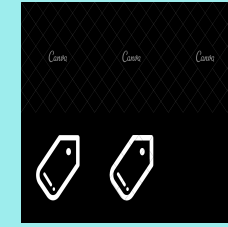
3

COMPARE  
ACTUAL VS  
PLANNED  
PERFORMANCE  
RESULTS:  
DISCUSS  
FAILURES



4

EXPLORE  
REASONS FOR  
DEPARTURE  
FROM  
STANDARDS



5

DEVELOP  
ACTION PLANS  
AND FOLLOW-UP  
DATE(S)

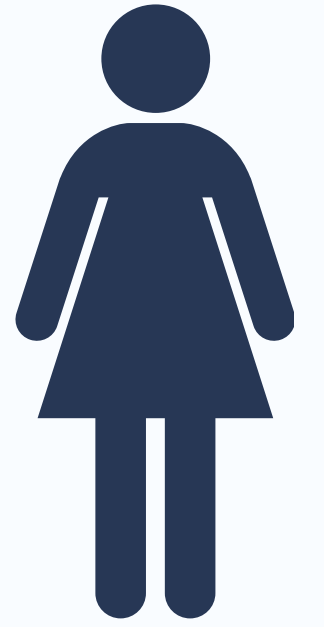


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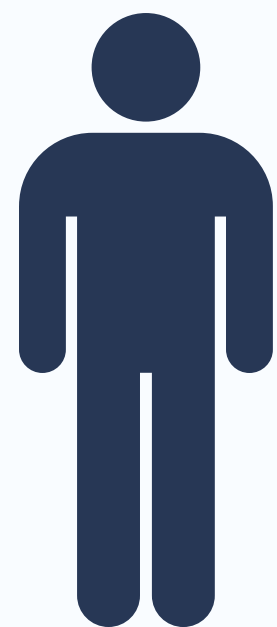
FINISH THE  
PAPERWORK

## STEPS IN PERFORMANCE REVIEW

**100%**

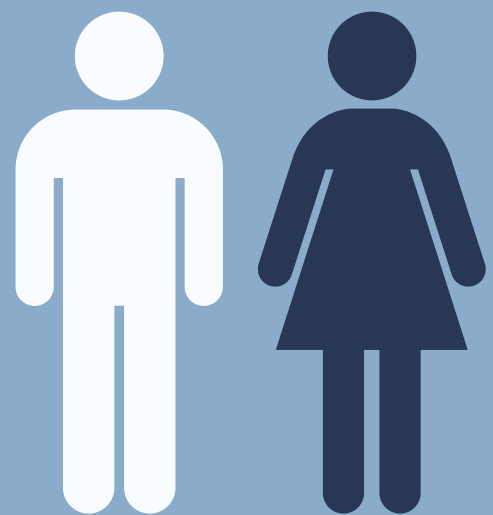


# STEP 1: OPEN THE DISCUSSION



**100%**

**Open the discussion by Stating the purpose and importance of this review:**



## **PURPOSE**

Explain that the purpose of the meeting is for the two of you to compare the individual's actual performance in objectives with the agreed-upon performance standard.

## **SUMMARY OF PERFORMANCE**

Emphasise that this discussion is a summary of the performance based on the information you have both been collecting over the past months/year period.

## **MONITORING PERFORMANCE THROUGHOUT THE CYCLE**

The staff member has been monitoring his/her performance throughout the cycle. Explain that the person's input is critical and that he/she has a lot to contribute to the discussion.

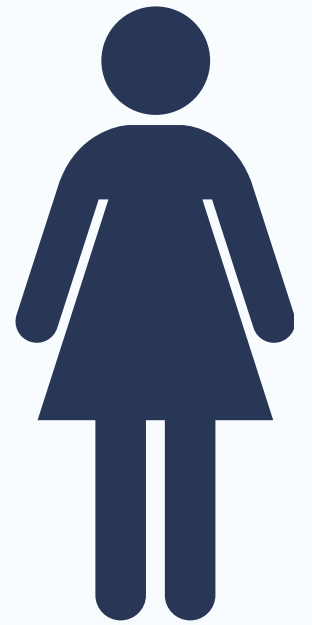
## **ENCOURAGEMENT**

Enhance self-esteem and encourage involvement.





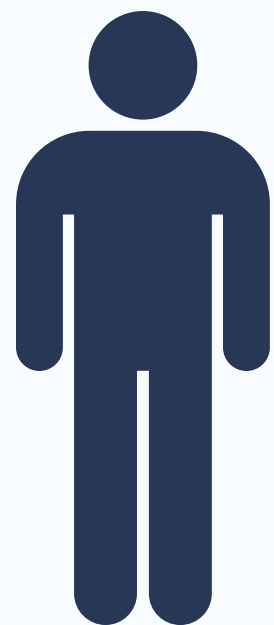
**STEP 2:**  
**COMPARE ACTUAL**  
**VS**



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**PLANNED PERFORMANCE RESULTS:**

**DISCUSS SUCCESSES**





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**ACTUAL PERFORMANCE**

**VS**

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**AGREED PERFORMANCE**

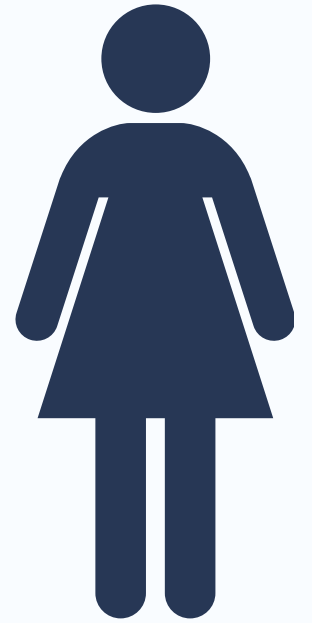


- **For each objective, discuss and agree how actual performance compares to the level agreed to.**
- **When the staff member has met objectives effectively, ask her to illustrate the success by providing an example of performance.**
- **This technique enhances self-esteem and encourages continued or improved performance.**
- **Listen and respond with empathy when the person discusses successful performance.**
- **Recognise the person's achievements by referring to positive examples you have been collecting throughout the cycle.**





# STEP 3: COMPARE ACTUAL VS



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PLANNED PERFORMANCE RESULTS:

**DISCUSS FAILURES**



# Focus on the Facts:

- If performance falls short of the objective, **focus on the facts, not the person,** to maintain self-esteem and reduce defensiveness.
- Be sure to keep the discussion positive to maintain self-esteem.



# Future-orientated discussion

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1

**UNCOVER CAUSES OF  
THE PROBLEM**

2

**DISCUSS WHAT CAN  
BE DONE ABOUT IT**

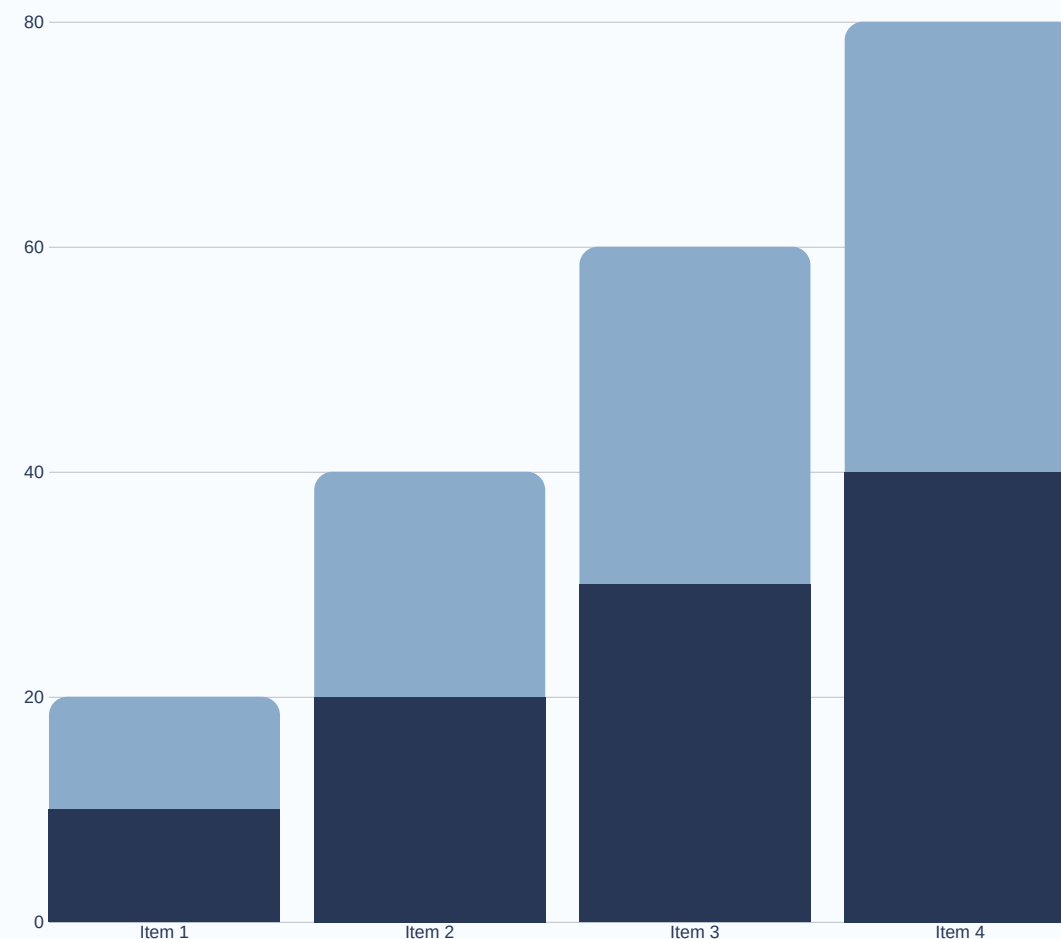
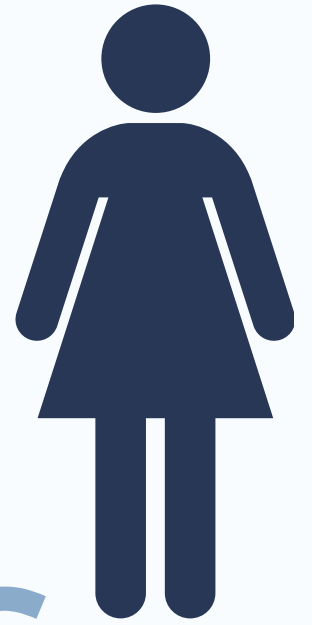
3

**LISTEN AND  
RESPOND WITH  
EMPATHY**

4

**ENSURE THAT FEEDBACK IS  
FACTUAL, RELEVANT,  
CONSTRUCTIVE, TACTFUL,  
HONEST, RESPECTFUL AND  
FOCUSED ON  
PERFORMANCE.**

# STEP 4: EXPLORE REASONS FOR DEPARTURE FROM STANDARDS



# Individual performance needs to be analysed to optimise future performance.

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It is not enough to just know that performance standards have not been met.

Both you and the employee **need to understand why performance standards have not been achieved.**

What are the underlying reasons? There might be a common denominator.

# Analyse all possible areas in which performance objectives were not met

**LACKING  
CERTAIN CORE  
COMPETENCIES  
OR SKILLS**

**HEALTH  
PROBLEMS**

**FAMILY  
PROBLEMS**

**MOTIVATION  
PROBLEMS**



**To assist you, you could potentially also look at what makes other incumbents successful, while this staff member does not perform, to **establish the gap.****

**Make a list of all the possible reasons for departure from the standard.**

- Is there a common underlying reason?**
- What is the bottom line?**

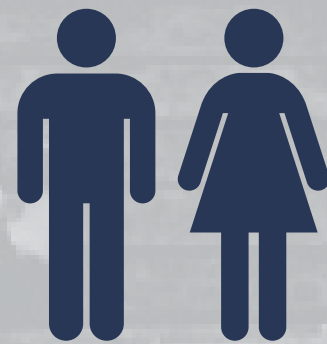
**Once you have analysed the performance thoroughly, you will be able to establish an action plan aimed at addressing the gaps.**

# STEP 5:

**Develop action plans and  
follow-up date(s)**



**You and the staff member** need to reach agreement on feedback given and received.



Both parties need to accept the current reality and the underlying reasons for that reality, before one can move forward by developing an action plan.

- Summarise the main points of feedback.
- Then develop an action plan to address all these points.
- Some actions might have to be taken by the supervisor/manager and some by the individual.
- An action plan is specifically aimed at bringing performance to an acceptable level or standard.



**AGREE ON ACTION  
PLANS**



**WHAT SHOULD  
CONTINUE AND  
WHAT SHOULD BE  
DONE DIFFERENTLY**



**SEEK IDEAS**



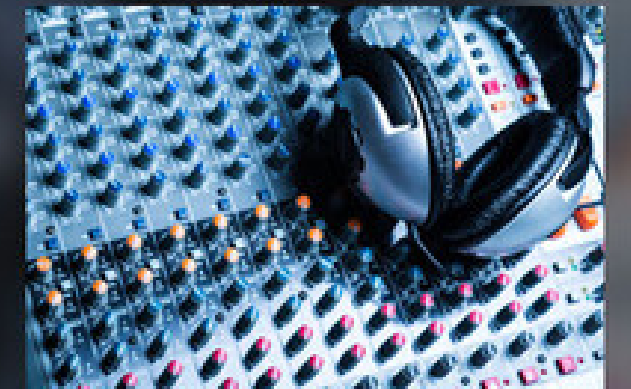
**ONGOING SUPPORT  
AND COACHING  
AND FOLLOW UP**



## Let's Talk...

Make an appointment to speak with a specialist regarding our professional service. Let us know how we can help.

Contact Us

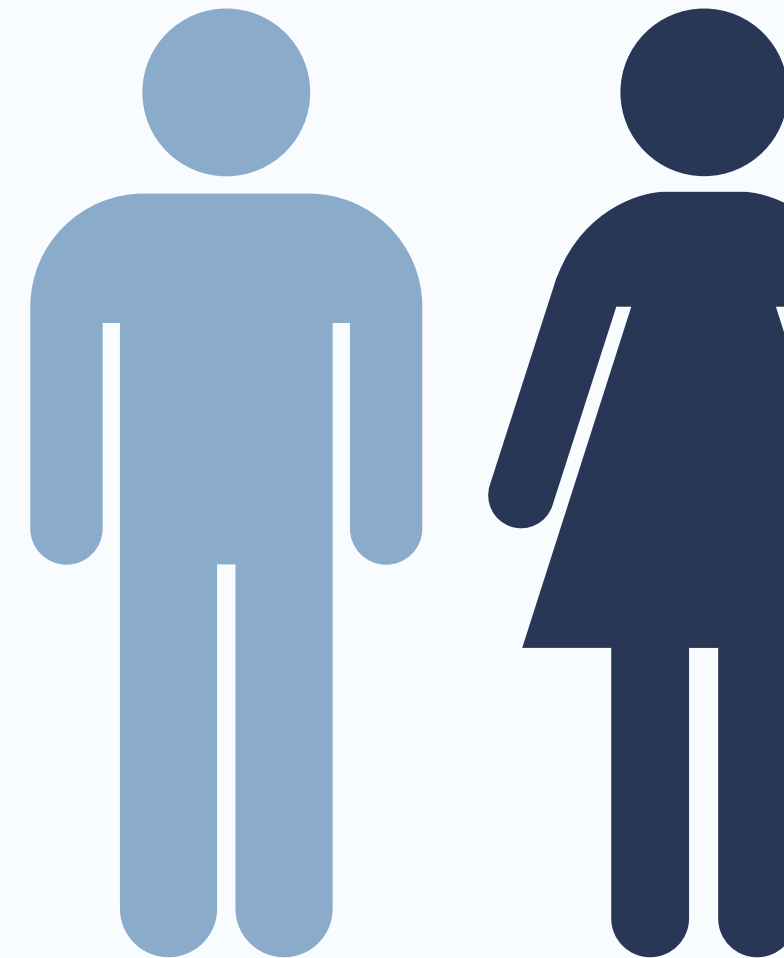


**The action plan could include development mechanisms such as Training, Coaching, Counselling, Studying, Self-study, Reading, Mentoring, Observing, and Practice.**

# At the end of the discussion Summarise what have been discussed

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- **BECAUSE THIS DISCUSSION COVERS A VARIETY OF TOPICS, IT'S IMPORTANT THAT YOU ARE BOTH CLEAR ON THE ACTIONS TO WHICH YOU HAVE AGREED.**
- **ASK THE STAFF MEMBER TO SUMMARISE OR USE YOUR NOTES TO RECAP EACH ACTION AND FOLLOW-UP DATE.**
- **EXPRESS CONFIDENCE.**
- **ENDING THE DISCUSSION WITH A SINCERE EXPRESSION OF CONFIDENCE IN THE PERSON'S ABILITIES REINFORCES THE FACT THAT THIS DISCUSSION IS POSITIVE AND FUTURE ORIENTATED.**
- **CLOSE THE DISCUSSIONS.**



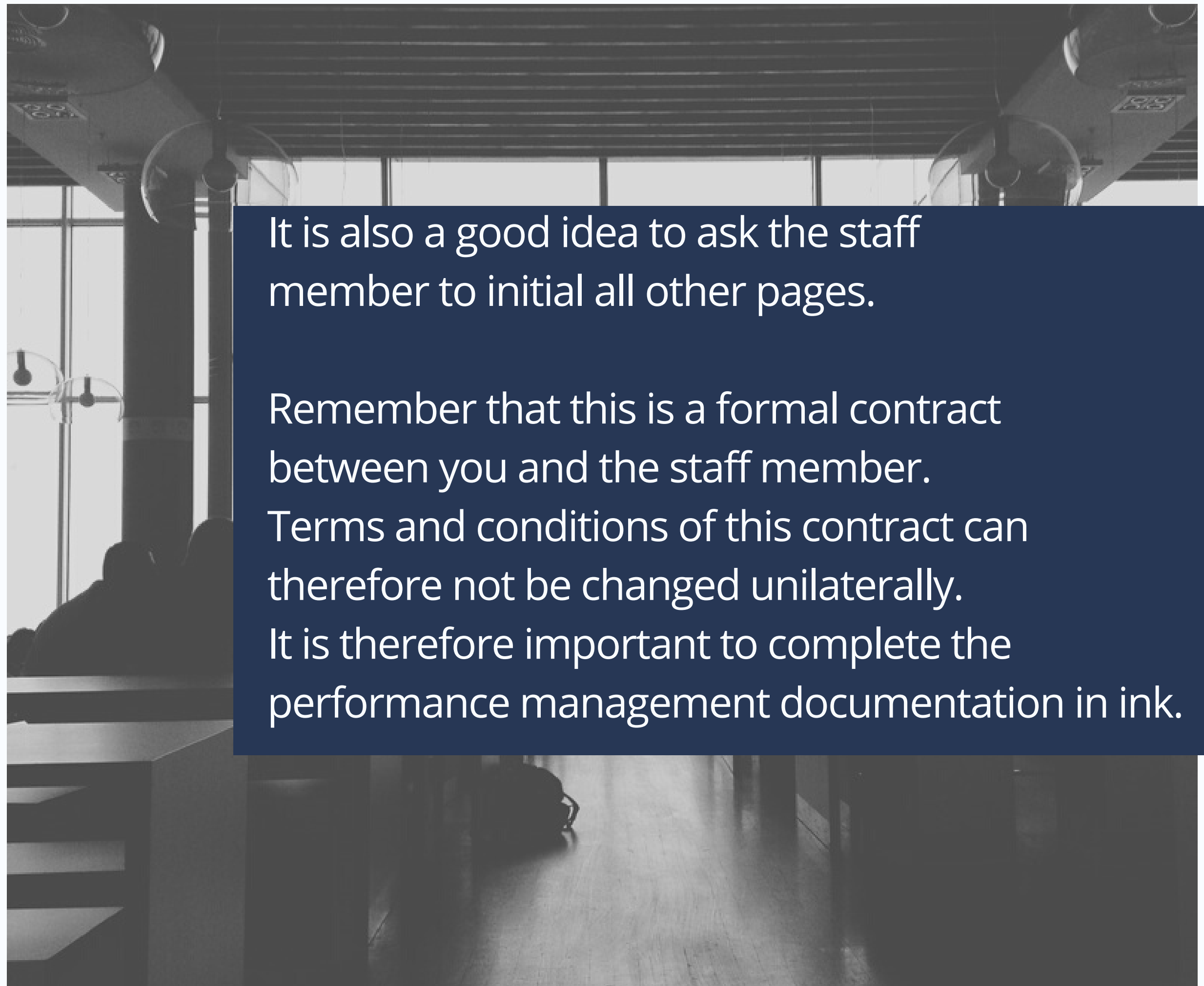


# STEP 6: FINISH THE PAPERWORK

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Before you close the meeting, ensure that all the relevant documentation is completed and signed off by both parties. Both the first and the last pages of the performance management document might require signatures from the manager and staff member.





It is also a good idea to ask the staff member to initial all other pages.

Remember that this is a formal contract between you and the staff member. Terms and conditions of this contract can therefore not be changed unilaterally. It is therefore important to complete the performance management documentation in ink.



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