



# Performance Management Master Checklist (Performance Management Tools For THIS Century)

*Robert Bacal, Robert Bacal*

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What is the most common reason performance appraisals are so uncomfortable for all involved AND seem like so much wasted paperwork?

It's actually quite simple. Appraisals are awkward and uncomfortable (and useless/costly in terms of time) because managers skip too many of the steps needed to make it work.

The skipped steps are what makes the performance appraisal meaningful to the manager, employee and the organization. These steps are what makes the whole thing work!

The "Dangling Appraisal Syndrome"

Performance appraisals often fail because they are unconnected to other important aspects of managing and improving performance. The "dangling" syndrome is caused by missing out important steps. The result? Time, effort and stress put into employee reviews with no positive outcomes. You need all the steps.

Once you understand the steps and shift your focus to improving performance and employee success, you are ready to revitalize a key management tool that can make your life easier. By doing all the steps you:

- \* tie individual goals and objectives to achieving what's important for your department and company.
- \* establish positive expectations about the appraisal meetings so employees see the appraisal meeting as something they want to be involved with.
- \* increase the ability for employees to monitor their own performance, and communicate all year round about being better at their jobs.
- \* Lay the groundwork for performance discussions so there are absolutely no surprises during the appraisal meeting.

It boils down to this: Undertake all the steps, become a performance manager and enabler, rather than just a performance appraiser and you'll spend less time dealing with problems, and more time left to do the things you and only can do.

The Performance Management Master Checklist

The thing is that it's easy to skip steps because you are busy, and it appears to be efficient. It's not. The more you cut corners, the more likely you pay big time when you run into situations where employees are not performing up to your potential.

So, we created a checklist you can use to remind yourself of the complete set of steps needed to profit from the performance management/appraisal process, and yes, to make it less uncomfortable, so by the time to actually get to the appraisal, it's no more than a short 15 minute discussion with each employee. Really!

This helpcard maps out the steps of the performance management process from performance planning to the performance review meeting. Formatted in a checklist format so managers can check off tasks as they are completed. Based on our best selling book - Performance Management - A Briefcase Book, the process outlined is integrated with strategic planning and stresses managers as being helpers and partners in performance improvement

The checklist is formatted to allow employees and managers to tick off completed steps. Steps are grouped as follows:

- \* Once A Year Overview
- \* Performance Planning - Preparation
- \* Performance Planning - Scheduling
- \* The Planning Meeting
- \* During the Year Steps
- \* Performance Review - Preparation
- \* Performance Review - The Meeting

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