Alternative Performance Appraisal Template Pack

StaffCircle
your people unified

Introduction

Introduction

Performance management can be a complicated process that consumes a lot of time, has a lot of paperwork, and sometimes fails to make a positive contribution to a business. On the other hand, sometimes, performance management is simple and incredibly effective.

This **Alternative Performance Review Appraisal Pack** consists of four different systems for conducting a performance review. Each system is intended to be motivating for team members, while being easy to understand.

Templates Included

1. Stop, Start, Continue

2. Quarterly Check-In

3. OKR Review

4. Goal Setting

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How to use Stop, Start, Continue

One reason why performance management and feedback systems fail is that they are over complicated. Each question asked during an appraisal adds a layer of complexity that results in employees finding it difficult to take actionable feedback. Stop, Start, Continue is a feedback tool that strips out all of the complications and provides clear actionable takeaways.

How to use Stop, Start, Continue
The brilliance of this tool stems from its simplicity. You need to identify with the team member some behaviours that they should stop doing, start doing and continue doing. That's it!

Ask the employee to self-assess using this tool ahead of your review meeting to stimulate some interesting discussions.
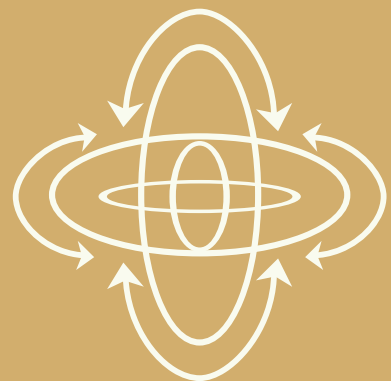
When to use Stop, Start, Continue
The ideal time to use Stop, Start, Continue is during a regular check-in, ideally quarterly, bi-annually or annually. They do not lend themselves to monthly check-ins because the team member is unlikely to exhibit behaviours that warrant this kind of consideration so frequently.

Top Tip: 360 Appraisal

Stop, Start, Continue provides a useful framework for collecting 360 feedback. Send out the Stop, Start, Continue questionnaire to all of the stakeholders who you think should provide helpful feedback about the team member (e.g. co-workers, supervisors, direct reports, customers, suppliers, etc).

Be careful! 360 feedback isn't always well received, especially if you do not have an open culture built on trust.

STOP START CONTINUE

STOP

START

CONTINUE

Team member _____   Date _____   Signed _____

How to use The Quarterly Check-In

Once again, the theme here is simplicity. Typically, within any role, there are three core aspects against which an employee can be appraised: the role and responsibilities, objectives, and alignment to values. If your team is full of individuals who are performing well in these three key areas, well done! You're leading have a high-performing team and with a great culture.

How to use The Quarterly Check-In
Use The Quarterly Check-In to structure an informal conversation, giving feedback and understanding your employee's thoughts related to each of the three sections: objectives, the Role, company Values.

Use questions as prompts to get the employee talking about the three main performance areas and use active listening to uncover issues, capture moments of achievement, and spot growth opportunities.

When the discussion turns to the subject of company values, you want to draw out examples of the employee demonstrating the values. Remind the employee ahead of the review meeting to think about some examples so that they aren't caught off-guard and left struggling to think of examples during the meeting.

Suggested question prompts

Objectives
1. Where do you think your objectives could be improved in future?
2. How do you feel you are progressing against your objectives?
3. Are any of your objectives causing you concern?

The Role
1. What has been the most challenging part of your role?
2. How can management help you in your role?
3. What are your future plans in this job?

THE QUARTERLY CHECK-IN

OBJECTIVES

THE ROLE

COMPANY VALUES

Team member _____   Date _____   Signed _____

How to use The OKR Review

Are you seeking a performance management system that unites your team around a common goal, inspires actions, encourages managed risk-taking, and rewards success but doesn't punish missed targets? If the answer is yes, Objectives and Key Results (OKRs) is the system for you.

OKRs are frequently associated with large tech companies such as Google, IBM and Adobe, but there is nothing in the OKR system that would make it unsuitable for any organisation. However, those wishing to implement OKRs as a performance management system should take the time to fully understand the process, commit to continuous improvement, and develop a culture of open feedback that avoids blame.

How to use Objectives and Key Results
OKRs need to flexible, transparent, measurable and aspirational, but also they need to be clearly aligned to the big strategic objectives. Once you have the objective, you use the key results to guage whether you are on-track for achieving the objective. Think of your Key Results as the leading indicator for success that needs monitoring regularly.

To give you an idea of how this could look for your business, here is an example:

Objective
Increase Drivers in System

Key Results
Increase driver base in each region by 20%
Increase driver average session to 26 hours / weekly in all active regions

Before Implementing OKRs

If you are new to Objectives and Key Results, be sure to take the time to fully understand how they work. We recommend reading John Doerr's *Measure What Matters or* Niven & Lamorte's *Objectives & Key Results.*

▶ **Watch the OKR TED Talk**

OKR REVIEW

Team member _____   Date _____   Signed _____

DEPARTMENT/COMPANY OBJECTIVE

PERSONAL OBJECTIVE

KEY RESULT 1

Score | Q1 1 | Q1 2 | Q1 3 | Q2 1 | Q2 2 | Q2 3 | Q3 1 | Q3 2 | Q3 3 | Q4 1 | Q4 2 | Q4 3 | FINAL

KEY RESULT 2

Score | Q1 1 | Q1 2 | Q1 3 | Q2 1 | Q2 2 | Q2 3 | Q3 1 | Q3 2 | Q3 3 | Q4 1 | Q4 2 | Q4 3 | FINAL

KEY RESULT 3

Score | Q1 1 | Q1 2 | Q1 3 | Q2 1 | Q2 2 | Q2 3 | Q3 1 | Q3 2 | Q3 3 | Q4 1 | Q4 2 | Q4 3 | FINAL

How to use Goal Setting template

Introducing Objectives and Key Results isn't the right approach for every business and there are some roles where implementing it can prove to be difficult. Where this is the case, goal setting can serve as a useful alternative. Research has shown that goal setting is a powerful way of motivating staff, especially when monitored regularly.

How to use Goal Setting

We recommend using this tool on a quarterly basis. Each quarter, at the review meeting, the line manager should discuss the departmental priorities with the employee. Working together in a collaborative process, the manager and employee can agree on some clear goals that will need to be achieved in order to reach the departmental objective. These should be the highest priority goals for this employee.

Further to the departmental objectives, the employee may wish to establish some developmental objectives, such as undertaking some training. These can also be included as a goal for the employee, but they should sit below the departmental goals in the goal prioritisation.

When defining the goals, make them SMART (specific, measurable, attainable, relevant, time-bound) so that when it comes to reviewing the goals there can be no uncertainty about what was expected. If there are several steps required to complete a goal, use the template to capture those steps, plotting some start and end dates for those tasks.

Use your regular team meetings or weekly toolbox talks to quickly check-in on the progress of your team's goals. Give them an opportunity to speak up if they are struggling to complete a goal and then make time to sit down with them to help unblock any challenges that might be facing.
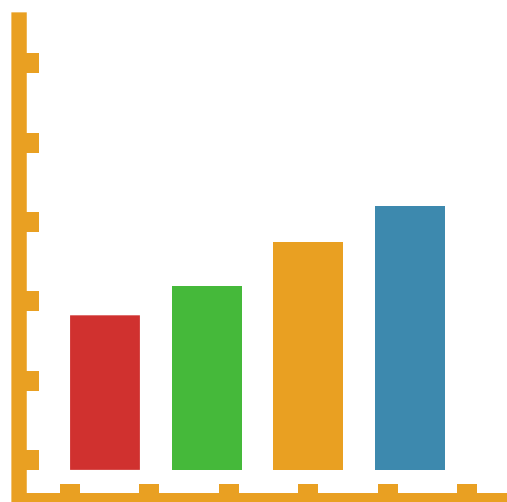
GOAL SETTING

Team member _____   Date _____   Signed _____

Goals	Anticipated Outcomes
1.	
2.	
3.	

GOAL 1: _____

Actions required   **Start date:**   **End date:**

_____

_____

_____

Plan to execute task

Resources required:

Actions required for follow-up

Contingency plans:

GOAL 2:

Actions required	Start date:	End date:

Plan to execute task

Resources required:

Actions required for follow-up

Contingency plans:

GOAL 3:

Actions required	Start date:	End date:

Plan to execute task

Resources required:

Actions required for follow-up:

Contingency plans: