

# DISCUSSING PERFORMANCE LEADER'S GUIDE

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## Introduction

This program is designed as a half-day group training session on performance feedback discussions in the workplace.

Just as the organizations that use this program are wide and varied, so are the desired outcomes of the participants attending. As a result, we have tried to make ***Discussing Performance*** as generic and flexible as possible.

This guide will provide you with background notes along with practical activities and suggested running times. Feel free to add to or adapt the structure of this training session to suit your needs.

You do not need to complete all exercises provided unless they suit the specific requirements of your organization. Of course, the time schedule we have provided is only a guideline. The time spent on each activity is entirely dependant on the objectives of the trainer/facilitator and the progression rate of participants.

## Preparation

In order to maximize the benefits of this training session, we recommend that the trainers/facilitators familiarize themselves with the topic at hand. You should be comfortable with the material in this guide, the video and PowerPoint™ slides.

You have been supplied with notes pages for each slide of the PowerPoint™ presentation, review them and make changes as it suits your training needs.

You have also been supplied with four participant handouts. Make sure that sufficient copies of each have been prepared prior to the training session.

In the training room you will need the following:

- Television and video cassette player
- Computer projection system or overhead projector
- Whiteboard with markers and eraser
- Notepaper and pens or pencils for participants

## Video Synopsis

Today's guest on National Radio's "Business As Usual" program is Sam Brown, Professor of Psychology and author of the book "Talking about Performance". Announcer, Mike Green is very impressed with this wonderfully practical book.

Sam's enthusiasm about performance feedback discussions is infectious. She convinces us that the best processes and systems in the world will fall apart at the seams if you don't understand why these meetings are so important and if you don't have the communication skills to make them work.

Author Sam introduces us to Rob and Claire, whose performance feedback discussion is the star case study in her book. In the beginning nothing goes according to plan and the results are disastrous. The audience travels on an emotional journey with Rob and Claire as they learn the secrets to making performance feedback discussions something to look forward to rather than being their worst nightmare.

When Rob discovers the value of: focusing on outcomes, tackling contentious issues and encouraging self appraisal the whole experience is turned around. He learns to avoid the pitfalls of: placing more importance on the interview than ongoing communication, setting up employees to be in competition with each other, thinking that these discussions are all about wages and salaries, dropping bombshells, concentrating on trivia and blaming not appraising. Oh what a difference a few practical pointers can make!

Before the end of this video Rob has the skills to: give positive and negative feedback, be assertive, work collaboratively to set goals and motivate his team to grow and develop professionally.

Whether you're a raw beginner at doing performance feedback discussions or you've been doing them for years, this video will help your meetings be more productive, more focused and more worthwhile.

### Featuring

**Len Firth** as Mike Green

**Deni Gordon** as Sam Brown

**Roger Newcombe** as Rob

**Tori Dixon Whittle** as Claire

## Suggested Training Design

This course has been designed to run as a half-day training session. If you do all of the course work within the allocated running time, your training session should run for approximately 3 hours and 55 minutes.

SECTION	TIME
Welcome & Introduction .....	15 Min
Objectives & Agenda .....	10 Min
Introduction .....	30 Min
Video Presentation .....	20 Min
PowerPoint Discussion .....	35 Min
Activity 1 – Value .....	20 Min
Activity 2 – True and False .....	10 Min
Activity 3 – Responding .....	20 Min
Break .....	20 Min
Activity 4 – Self-Appraisal .....	35 Min
Summary Discussion .....	20 Min

## Welcome & Introduction

Welcome all participants to the *Discussing Performance* training session.

Introduce yourself and tell the group something about your training background.

Explain how the training session is to be structured, how long it will run for, when the video will be shown, when breaks will be taken, what refreshments are available and where the phone and rest rooms are located.

## Objectives & Agenda

Discuss the objectives and agenda of this training course with the group.

After completing the training session on *Discussing Performance*, participants should have a firm understand the following:

- The value of focusing on outcomes
- How to tackle contentious issues
- How to formalize forward planning
- How to avoid common pitfalls
- How to give positive feedback
- How to encourage self-appraisal
- How to work collaboratively to set goals
- How to motivate each other to develop professionally

## Program Introduction

Using your own research and the training program introduction provided on the next page, give participants an overview of why performance feedback discussions are so important. Invite questions and discussion from the group as you go.

## Training Program Introduction

Informal performance discussions have been going on for as long as people have been employed. As soon as someone worked for someone else, the “someone else” wanted to know if they were getting value for whatever they were paying. As such, it’s always been assumed that appraising performance is a basic element of doing business. For as long as anyone can remember, bosses have been encouraging workers to work harder, faster and smarter. Images of Egyptians building the pyramids, galley slaves rowing boats and serfs plowing the fields under the strict control of a tyrannical landlord are common in the pages of our history books.

Then along came the industrial revolution and the “might is right” method was replaced by methods that were equally brutal. One of the first recorded ways of judging a worker’s performance came in the early 1800’s when Robert Owen employed what he called “a silent monitor”. He would hang a piece of wood above every employee and each day it would change color depending on whether the worker was seen to be performing to his/her optimum standard. If they were doing excellent work, it would be white, good work, yellow and so forth through the colors of the rainbow through to black which, needless to say, meant it was likely they were in for a dismissal notice in the near future. Now some of you might be thinking that this sounds like a simple workable idea. However, history has also shown that methods like the above are neither workable nor effective.

This ideology might have been fine 100 years ago when there was a bottomless pit of workers to serve the production lines, but that has all changed. Every job needs good people. They need to be well educated, professionally trained and motivated to care about their organization. As supervisors or team leaders, we need to appreciate their efforts. In return for their commitment we need to care about their work satisfaction. The competition for good people is tough. Quite simply, if you don’t look after them, eventually they’ll leave and find an employer who does.

Formal performance analysis has been known by a multitude of names over the years – Performance Appraisals, Performance Reviews, Appraisal Reviews etc. With each new re-incarnation the focus has slowly shifted from discipline and control to analysis, encouragement and motivation.

## Participant Activity #1

Pass out copies of Handout #1, divide participants into groups of six to eight and ask them to come up with answers to the questions. Go through responses on the whiteboard and discuss. Sample answers are provided below.

### 1. Why might Claire be perceived as valuable to her organization?

Possible correct responses include:

- Claire loves her job.
- Claire has an excellent attitude.
- Claire is good with customers.
- Claire is a good problem solver.
- Claire is excellent at handling difficult customers.

### 2. Why should Rob do his best to make sure that Claire is a satisfied and motivated employee?

Possible correct responses include:

- It cost the organization considerable time and money to recruit and train her.
- It would be expensive to replace her if she were to leave.
- The person who replaces Claire may not be as good as Claire.

After reviewing Handout #1, ask questions of the group and together create an imaginary budget for what it might cost to replace Claire. Be sure to include the following:

- Advertising
- Interviewing
- Hiring temps during the changeover
- Training of new employee



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## Participant Handout #1 – Value

1. Why might Claire be perceived as valuable to her organization?

FOR PREVIEW ONLY

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2. Why should Rob do his best to make sure that Claire is a satisfied and motivated employee?

FOR PREVIEW ONLY

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## Participant Activity #2

Pass out copies of Handout #2 and ask participants to answer the questions. Go through the handout and discuss the answers. Address any questions the group may have.

Correct answers to True/False Quiz:

1. It would be better if we could simply return to the colored pieces of wood that Robert Owen used in the early 1800's.  TRUE  FALSE
2. If employees are not performing in a satisfactory manner it is better to simply replace them.  TRUE  FALSE
3. Performance feedback discussions are not the same as disciplinary meetings.  TRUE  FALSE
4. Performance feedback discussions must be held in an atmosphere of trust.  TRUE  FALSE
5. Only the team leader needs to study the job description before the performance feedback discussion.  TRUE  FALSE
6. Always invite the person to the performance feedback discussion yourself.  TRUE  FALSE
7. Begin the meeting with a brief outline of the problems you want to address according to your agenda.  TRUE  FALSE
8. Performance feedback discussions are best combined with wage and salary reviews.  TRUE  FALSE
9. Only take work phone calls during a performance feedback discussion.  TRUE  FALSE
10. You need to ensure that the rating you give is objective and impartial.  TRUE  FALSE
11. Always emphasize what you will do to help the person achieve their goals.  TRUE  FALSE

## Handout #2 – True/False Quiz

Evaluate each statement and decide whether you feel it is true or false.

1. It would be better if we could simply return to the colored pieces of wood that Robert Owen used in the early 1800's.  TRUE  
 FALSE
2. If employees are not performing in a satisfactory manner it is better to simply replace them.  TRUE  
 FALSE
3. Performance feedback discussions are not the same as disciplinary meetings.  TRUE  
 FALSE
4. Performance feedback discussions must be held in an atmosphere of trust.  TRUE  
 FALSE
5. Only the team leader needs to study the job description before the performance feedback discussion.  TRUE  
 FALSE
6. Always invite the person to the performance feedback discussion yourself.  TRUE  
 FALSE
7. Begin the meeting with a brief outline of the problems you want to address according to your agenda.  TRUE  
 FALSE
8. Performance feedback discussions are best combined with wage and salary reviews.  TRUE  
 FALSE
9. Only take work phone calls during a performance feedback discussion.  TRUE  
 FALSE
10. You need to ensure that the rating you give is objective and impartial.  TRUE  
 FALSE
11. Always emphasize what you will do to help the person achieve their goals.  TRUE  
 FALSE

## Participant Activity #3

Pass out copies of Handout #3 and divide participants into groups of two.

Refresh participants' memories about:

- The difference between sympathy and empathy
- The need to encourage self-appraisal
- The value of active listening

Ask each group to role-play Question 1 or Question 2 – one participant using a sympathetic response, and the other using an empathetic response. Go through responses on the whiteboard and discuss. Sample answers are provided below.

1. I just can't seem to make the other members of my team understand how to handle difficult customers.

Possible correct responses include:

**Sympathy:** Look, it's easy. You just tell them. You know how to do it.

**Empathy:** I understand that must be frustrating. How have you been doing it so far? Can you think of any ways we might address it?

2. I'm not getting the work satisfaction I need from full time customer service.

Possible correct responses include:

**Sympathy:** I know just how you feel it's horrible.

**Empathy:** When did you start feeling like this? Have you had any thoughts about how we could address it?

## Handout #3 – Active Listening

Provide one sympathetic and one empathetic response to each statement.

1. I just can't seem to make the other members of my team understand how to handle difficult customers.

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E:

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2. I'm not getting the work satisfaction I need from full-time customer service.

S:

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E:

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## Participant Activity #4

**Pass out copies of Handout #4** and ask participants to answer the self-appraisal questions as honestly as possible. Go through a few responses with the group, using answers of those who are willing to share. Address any problems the participants might be having and ask other participants to respond to the information as if they were hearing it in a performance feedback discussion.

### Self-Appraisal Questions:

I have achieved the following successes this year.

- 1.
- 2.
- 3.

I have learning opportunities in the following areas.

- 1.
- 2.
- 3.

I have these goals I wish to achieve.

- 1.
- 2.
- 3.

## Handout #4 - Self-Appraisal Form

Complete the following self-appraisal form as it applies to you.

I have achieved the following successes this year.

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_

I have learning opportunities in the following areas.

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_

I have these goals I wish to achieve:

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_

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## Summary Discussion & Wrap-Up

### Suggested Discussion Starters:

- Why don't we call these meetings "Appraisal Meetings" or "Performance Reviews" anymore?
- Are they still the same thing?
- What do you think about Sam Brown the author? Has she convinced you that there is value in a performance feedback discussion? Why?
- Do you think Rob is a good person or a bad person? We often assume that the people who are getting it right are the good people and the people who are getting it wrong are bad and horrible. This is not the case. The majority of people who are getting it wrong are still good people – they are just untrained.
- Why is it important for Rob to improve his skills at conducting a performance feedback discussion?
- How will it affect his organization if he doesn't learn these skills?
- Did Claire have every right to walk out in their first meeting?

### Session Wrap-Up :

- Ask for and answer any questions that participants may have.
- Let participants know if and when any follow up training is to be held.
- Give participants a copy of **Handout # 5** – The Summary Sheet.



## Handout #5 – Summary Sheet

- Performance feedback discussions don't replace feedback on "day to day" work issues. They are instead the formal middle step in an ongoing dialogue between an employee and their supervisor or team leader.
- They provide the opportunity to air any concerns and talk about career moves, explore learning opportunities and set goals for the year ahead.
- Performance feedback discussions should be held in an atmosphere of trust. They are not a test or competition so there should be no surprises or bombshells.
- When setting up the meeting, give people plenty of notice and make it personal by inviting them to the discussion yourself. It's always best to meet in a neutral environment, allow ample time and encourage phone calls and interruptions.
- A performance feedback discussion is not a disciplinary meeting, however, you will need to tackle contentious issues when there is a pattern of behavior.
- Before the actual meeting both parties should take time to prepare. Both parties need to work through the job description to make sure it's accurate, familiarize themselves with previous performance agreements, collate any notes from throughout the year and have a well thought out agenda.
- Start the meeting on a positive note by acknowledging a person's strengths and achievements. Describe the good behavior in detail. Make it personal by using the "I" word. You also need to be open to detail – let them tell you more.
- Do your utmost to encourage self-appraisal. Explore issues with open questions that begin with words like "why, what, where and how". Use your agenda to keep you focused and deal with one issue at a time.
- Talk about weaknesses in terms of needs and learning opportunities. Practice your best listening skills by being attentive to the other person's perspective, resisting the urge to speak yourself, showing interest and acknowledging what they have to say. Then summarize their point of view and set out to find solutions. Work on building consensus, setting goals for the year ahead and agreeing on outcomes.

After that it's just a matter of completing the paperwork and signing it!

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