

Conducting the Appraisal Meeting

1. **Schedule the meeting with the employee a few days before the meeting.**
2. **Control the environment - prepare the setting.**
3. **Set the tone - state the purposes of the meeting – *employee recognition and development***
 - Explain the importance of the meeting and the two-way discussion to the employee and the company. *“This meeting and this process are important.”*
 - Ask the employee what benefits he/she sees to a 2-way discussion in a meeting like this.
 - Keep a professional tone to the conversation and use positive language.
 - Use the SILENT method.
 - √ Sit Square
 - √ Investigate
 - √ Lean Forward
 - √ Eye Contact
 - √ Nod Occasionally
 - √ Take Time
4. **Listen - ask for the employee’s opinion**
 - Ask for the employee’s views about his/her performance for the past appraisal period using the self-appraisal (if prepared).
 - Withhold comments. The only talking you want to do is to verify what you hear and to ask questions for clarification.
5. **Present your assessment & build on the employee’s strengths**

6. Ask for the employee’s reaction

- When your appraisal disagrees with the employee’s self-evaluation (positively or negatively), explain your reasons.
- Ask questions to clarify when there is not agreement.

Some supervisors start the meeting by reviewing first the items of agreement between the 2 forms, then the points of disagreement.

- When agreement cannot be reached, remember it is not your job to force the employee to change his/her mind. Simply summarize both you and the employee’s points of views. Then move on to the next item.

7. Set SMART Goals and/or Improvement Plans for the Next Appraisal Period

- Specific
- Measurable
- Achievable
- Relevant
- Time Based

8. Summarize & Close the Discussion

- At the end of the discussion, summarize by asking the employee to identify strengths and areas for improvement. You will want to add to this list if the employee has missed some issues that you think are important.
- Have the employee sign the appraisal and give him/her a copy.

9. Set the Next Appraisal or Interim Meeting Date or Timeframe



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