



Career Development Skills & Workshops

Management Modules

Reviews and Appraisals

Employee name:

Pub:



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Reviews and Appraisals

The skills and knowledge you will gain:

- ✓ Probationary reviews – their purpose and benefit
- ✓ How to prepare and conduct positive probationary reviews
- ✓ 1:1s – their purpose and tips on how to structure them
- ✓ Appraisals – the benefits of conducting yearly appraisals
- ✓ Appraisal content
- ✓ Tips for successful reviews

Introduction

Our team truly are the company's best asset and for that reason ensuring they are happy, knowledgeable and motivated in their workplace should be every manager's priority.

It's critical that managers communicate regularly with individuals to give them feedback, set new goals or targets and listen to any worries. They should also carry out an all-round evaluation of the team member's performance and behaviours.

Companies will set their own strategy for performing these tasks and there are a number of ways this can be achieved. However, regardless of the type of review it's the quality of it that counts; reviews that are not prepared or given careful consideration just become a tick box exercise and more importantly give nothing back to the employee other than lost time!

This workshop will allow you to understand the types of review used in the business, their benefits and how to conduct them. It will also give you the tips for making reviews a positive, constructive experience for the team member and yourself.

What to expect:

- ✓ Some reading and exercises for you to complete within this workbook.
- ✓ Practical assignments to complete.

Who will be your mentor and what can you expect from them?

Your mentor is there to coach you through the learning and can help with any questions you have. They are there to support you but not to carry out the assignment – that's down to you to show off your talents! Your mentor will be a person who is competent in the skills and knowledge you need to gain.

How long do I have to complete my workshop?

You may take as long as you need to read the information so you are comfortable and able put your learning into practice. For the practical assignments you will have time assigned throughout your working week to complete them.

So let's get started, remembering our Team Value, *"Preparation is the key - always prepare for success."*

Types of review

There are three main types of review we use within our business which are used to facilitate regular conversations with an individual to make sure that they are not only performing but are happy in their role, getting the right amount of support and training as well as creating opportunities for further development.

Probationary reviews

These reviews are to discuss a new employee's progress and identify any further support they may need to perform their role. There are usually a set of 3 meetings well before the probationary period ends. Every new employee should have these meetings scheduled in line with the company's probationary review guidelines which can be found within the trainer's tool box on training page of the web site.

1:1s

These kind of reviews happen on a regular basis, primarily used by senior managers to have regular communication with a number of individuals that report directly to them. They are a useful and productive way of reviewing goals and targets, setting short to mid-term tasks and for giving feedback. They also enable the senior manager to check how the employee is. Their frequency is normally every 3-4 weeks - any less and the employee may not have the time to achieve goals that have been set.

Appraisals or performance reviews

An appraisal or performance review is an evaluation done on the employee's job performance over a specific period of time. It will have measureable goals or targets that allow the employee's performance to be evaluated and as well as setting new targets for the coming year. Behaviours and attitudes will also be taken into consideration.

The review is an opportunity for the employee's achievements and successes to be acknowledged formally and for any areas of under achievement to be highlighted. The employee's ambitions for the coming year are also explored as well as any further training and development deemed beneficial. These type of reviews are carried out on a yearly basis.



Probationary reviews

*"You spend so much time finding great people, it's worth it to help them grow to be the best they can be."
JUSTIN ROSENSTEIN, , (Co-Founder, Asana)*

It's fair to say that the first 8 weeks of a new team member's employment can be an impressionable and challenging period settling into their new role, getting to know their new team mates and managers and in some venues, just finding their way around can prove daunting. This is without taking on board any new skills or learning they may need to grasp for their new role. With this in mind it's not surprising that many new employees leave their job in the first few weeks and months because they have not settled in well to the team or role.

Probationary reviews are an important part of the new employee's induction period and enable regular communication with their line manager enabling feedback whilst giving support as well as providing a sensor check that they are doing fine and are on track.

For a manager it's an important tool. At the early stages of employment it allows them to make sure the new team member is settling in, receiving quality training and grasping the skills they need to achieve. As a mid-way bench mark is allows the manager to again assess how they are settling in but giving more emphasis on the skills and knowledge learnt and importantly highlighting any areas that need focus or perhaps need extra support to get the employee to the require standard. Remember no one wants a new employee not to make the grade, it's the very opposite so using the probationary review tool allows clarity on performance of the team member.

Behaviours and team work are also measured as they play an integral part to customer facing roles. Skills and knowledge can be taught, attitude and behaviours are reliant on the individual wanting to change.

Key points to remember:

1. Probationary periods can help avoid performance issues later so always be honest and make provision for further training or support to help overcome the performance issue.
2. Do not wait until the end of the probationary period before addressing performance issues. The employee needs to be given a chance and time to improve during the probationary period. If you don't have honest conversations they won't know they need to work on improvement.
3. Consider contractual rights during the probationary period and **always check with HR before making any decisions** on the employee's role. It maybe that an extended probationary period is needed however this has to be discussed with the individual before the probationary period has expired.
4. If it is clear that the employee is not suited to the job termination before the end of the probationary period is an option **but you must discuss this with HR first before any discussions with the employee.**

Preparing and conducting positive probationary reviews

1. Conduct regular meetings

Using the probationary review template set up the review meetings to discuss the employee's progress, using the 4 and 8 weeks' timeline.

For an individual that is showing signs of underperformance at 8 weeks another date should be scheduled before the 12 probationary period ends to review their progress. This also gives time to assess if the probationary period needs to be extended to accommodate extra support training.

The review meetings must be conducted before the probationary period is up. If you fail to conduct the final meeting before the end date, the employee's role may be confirmed by default so always book in your meeting dates.

2. Be prepared

To get the most out of a probation meeting you must prepare for it by reviewing the team members work and performance. You should identify those areas that they are performing well in and importantly any areas that need further focus or training.

The feedback can come from other sources such as their buddy trainer or a duty manager who may well have worked operationally with them more than you have.

For areas that need more focus you should think about how you can help the team member to achieve this, perhaps by refresher training or simply more practice in a skill.

Book or choose a suitable place to hold the meeting. This doesn't need to be a formal room set up, in fact more relaxed surroundings will help set the right balance. However you need to make sure the conversation is not going to be overheard or interrupted which would be uncomfortable for the team member and affect the tone of the meeting. An empty FOH location during service can soon become occupied!

3. Honest conversations

Progress meetings are an opportunity to engage with your new team member so make sure you highlight areas where they are doing well.

During the meeting it's important to give honest and open feedback about where the team member needs to improve giving examples which will help to ensure that they don't become entrenched in doing something badly and it's clear what is expected of them.

This does not have to be delivered in an unfriendly way but needs to be honest, clear and precise. Provide specific examples of areas where they need to develop their performance or correct their conduct avoiding generalisations.

4. Explore problems

You should use review meetings to explore any issues that have cropped up discussing these with the team member. For example, they might be finding it hard to get to grips with the technical aspects of the role or to grasp certain knowledge areas that are vital to give great service.

It should be a two-way meeting where the manager and employee analyse problems together including the reasons behind the issues and come up with a plan of action to address them.

5. Set the right tone

It is important that you set the right tone during a probationary review meeting. Being too stern or formal can be off putting for a new employee. Remember the emphasis should be on supporting the new team member. It's unreasonable to think that the employee should get everything right straight away. Some team members who are new to the hospitality business will need to learn the basics and build from there. This may mean their progress is slower but you should not assume they won't be able to achieve the required standard, particularly if the behaviours and attitude they display are positive.

When discussing any concerns you have regarding their performance remember to use words such as improvement needed rather than failure or where you're getting it wrong. The feedback needs to be constructive and generate helpful solutions.

6. Encourage an open dialogue

Give the team member the opportunity to raise and discuss any issues they may have. They may feel nervous about asking for help so put them at their ease by simply asking if there is anything they would like a recap training session on given they have covered a lot of ground.

7. Agree an action plan

Agree what needs to happen before the next review meeting whether it is extra practice, refresher training or improved behaviour or attitude. This should be noted on the review document.

Time to practice...

Lucy the GM has a fairly new member of the floor team who is due his probationary review. Dan has been in his role of bartender for 6 weeks and whilst his technical bar skills and customer care skills are brilliant she has had feedback from two duty managers that his solo close downs are poor, sloppy and lack focus. Some of the other bartenders have complained about the close downs as they have had to tidy or stock up before they start their own early morning shift jobs.

Lucy does some further investigation and finds out that Dan previously worked in a busy nightclub where he was one of 12 team members on the bar. She's also had some great customer feedback about him in terms of his service and she witnessed him giving advice on whisky choices to a server to help her upsell to her table.

A If you were Lucy how would you conduct the performance issue without causing team spirit issues amongst the team as well as making sure Dan is not left feeling demotivated?

B Outline the conversation highlights you would have with Dan. What questions might you ask him regarding his performance?

C What action points would you create outlining the reasons for them?

(Use the following blank page for your answer)

Blank for your answers



1:1 meetings

For managers who have several people reporting into them 1:1 meetings are an excellent way of engaging with the individuals within their team as well as tracking where they are in achieving targets, goals or tasks that have been given to them. They also give a chance for the individual to highlight any issues they have and be able to talk through them.

For constructive 1:1s follow the points below:

- All 1:1s should follow a short but structured agenda that remains the same for each meeting. That way the main areas of the business or persons role will always be covered. It also means that the conversation stays within boundaries and doesn't run off track losing focus. Always have an AOB in case there are items that don't fit within the agenda.
- Schedule the meetings regularly, every 3-4 weeks as guide but with enough time for the individual to get tasks done.
- Set a dedicated date and in particular, a time slot. 1:1s should not be long meetings given they are regular sessions. Anything between 30 mins to an hour should be sufficient.
- The 1: 1 is a time to build professional working relationships. Asking how someone has been or how their child's birthday party went shows engagement and interest from you as their line manager.
- When setting tasks or projects always set deadlines by asking the individual when they think they can have it completed for you. That way they are committing themselves to a time frame they have confirmed they can achieve. This is particularly useful for individuals who struggle to manage their time in relation to work load.
- Always take notes of the agreed actions and deadlines. At the next 1:1 return to these notes to review what has been actioned and achieved and make note of any "outstanding" so they roll over as "a to do" on the actions list.



Time to practice...

Write up a simple agenda to use for 4 weekly 1:1s for those members of the team that report into you and importantly you set tasks or goals. This could be either department supervisors (Bar or FOH) or assistant managers.

Think about the areas of discussion you would need to cover which should relate to the business and the individuals tasks and role.



Benefits of conducting yearly appraisals (performance reviews)

Amongst other things a yearly appraisal demonstrates that the business is genuinely interested in the individual's performance and development. This alone can have a positive influence on a team members sense of worth, belonging and commitment to the company. Recognition for performance, effort, commitment and engaging in the company's values is a powerful motivator.

Encouraging good work and improvement

Celebrating a job well-done is the easy part of the performance appraisal.

Discussing the areas of a team member's performance that need improvement is not as easy but it can be done in an honest and positive way by making it clear the areas that need focus and discussing ways in which you can help to support them to achieve this.

They also provide a structure for thinking through and planning the upcoming year and developing the individual's goals.

Training and development

This can be linked to an underperforming area or further training and development that the team member would benefit from. The appraisal gives an opportunity for the team member to highlight any areas they feel they would like further training in and for you as their manager to look at the possibilities of how this could be achieved.

Improving communication with no surprises

Sometimes there can be issues with communication between managers and a team member. The appraisal is an opportunity to raise this in a meaningful and constructive way so that the individual understands how communications can be improved. However it should not be the first time they are spoken to about it. In fact this applies to any areas of underperformance.

If a team member is being regularly communicated with throughout the year by means of 1:1s, coaching sessions or probationary reviews they will already know where they need to improve.

Remember there should never be any huge negative surprises in an appraisal. If there are then the question needs to be asked why the issue hasn't been discussed with the team member before.

Providing a career path

This is an opportunity to discuss the team member's medium to long term ambitions and goals.

It's a chance to discuss what they need to achieve to get there. Even if their midterm ambitions lie elsewhere you may still be able to help them to achieve this though extra training or perhaps some coaching.

The other benefit is you will know that you have a vacancy for this role in the midterm and can look at your internal man power plan for successors.

Appraisal content

The performance appraisal should reflect the employee's job description and goals. Job descriptions should be reviewed annually to ensure that they align with employee goals.

Questions asked during the appraisal should relate to the measurable goals that were set. This makes this part of the assessment easy in that the employee either accomplished their goals or they didn't.

Forthcoming year's goals and targets again need to be measurable.

There are some questions on performance appraisals that are written to determine the how or what behaviours individuals demonstrate to perform their tasks which can be very subjective. Questions like, "employee demonstrates passion and enthusiasm for the job and company" is an example of this. Where possible link it back to an example e.g. Dan helped on his evening off to help set up the marketing event as we were running late.

An employee should always leave an appraisal feeling uplifted and motivated so how you prepare for the review is important in order to achieve this.

Conducting successful reviews

To get the most out of any review make sure you follow the simple check list below to ensure your and the team member's time is productive and it's a positive experience.

- **Venue** – make sure you either book a suitable room or find a venue that is quiet and allows for a conversation not to be over heard preferably off site. Using a place outside of the individuals working environment puts them at their ease and in situations where performance is under review allows for discretion.
- **Timings** – Make sure you allow enough time in your diary to complete the review. Whilst you need to keep the length of discussion tight and on track, clock watching does not encourage a natural flow for the conversation.
- **Planning** – Always prepare for the review you are going to conduct. Gather feedback from others where needed, collate the results of targets or goals that were previously set and make notes of key points you want to highlight. Preparation also helps with timings and how long you need to allow for the review.
- **Stick to the script** – During the review remember to stick to the discussion topics you have planned to keep the conversation focused and timely. It's easy to drift off into other discussion topics which not only eats into your time but also distracts from the objectives of the review and desired outcome.
- **Document the review** – Always document the review either by using the company review forms for appraisals and probationary reviews or keeping notes of the discussions and action points for 1:1s. The team member should receive a copy of their annual review. For 1:1s encourage the team member to take their own notes to take ownership of their goals and tasks.
- **A positive outcome** – No matter what the discussion should always end on a positive note so that the team member walks away feeling the session was valuable and productive. This can still be done even if some of the discussion relates to poor performance. In this instance focus on the agreed solution to correct it in a positive manner.

Well-done! You've completed the workbook.

Once you have completed your prep for assignment no. 1 ask your mentor to review this with you to make sure you're on the right track.

Remember you have all the knowledge you need to help you carry out your practical assignment within your workbook.

Practical Assignment

- 1. Use your 1:1 agenda template and conduct a 1:1 with one of your team. Make sure you follow the reviews check list on page 10. After the first 1:1 set a date for a follow up 1:1.**
- 2. Role Play activity – with the help of your mentor carry out a probationary review for a team member using the correct team review document.**

Team member detail– Mary is employed as a server and has some previous experience of waiting on tables in a cafe. She has completed 4 weeks and is up to date with her training modules. Whilst she has the basic skills she needs to work on her menu knowledge as feedback from the buddy trainer is she is struggling to remember content of main courses which then makes her panic and loose concentration on what she should be doing in her section.

Remember our Team Value, "Preparation is the key - always prepare for success!"

Assignment Feedback

GM Comments:

Operations Manager Comments: