

accounting & finance portfolio

Conducting Performance Appraisals

For the busy accounting and finance professional, managing the performance of the people they manage is key to achieving objectives.

The appraisal sits at the heart of any approach to performance management. The process of viewing the previous year's performance and of agreeing expectations for the coming period is key to the professional relationships managers develop with their staff.

This course shows how investing time in conducting effective appraisals creates a motivated team and saves the manager time in the long term.

Conducting Performance Appraisals enables the learner to:

- Understand what an appraisal is for and why it is important
- Prepare effectively for an appraisal
- Plan and conduct constructive preliminary meetings and appraisal meetings
- Recognise what should and shouldn't be covered in an appraisal
- Ensure that their spoken and written comments are fair and effective
- Correctly complete any forms related to the appraisal process
- Learn techniques for handling any difficult situations that arise during appraisal meetings



Learning outcomes

Preparing for an appraisal

- What is an appraisal and what is it for?
- What principles should I follow?
- What is the procedure?
- What is the purpose of a preliminary meeting?
- What preparation do I need to do for the meeting?
- What preparation should I get the member of staff to do for the meeting?
- How should I approach the meeting itself?

The appraisal meeting

- How should I structure the meeting?
- What do we need to cover at the meeting?
- How do I ensure the meeting is constructive?
- What else should I bear in mind?

Writing the appraisal document

- What do I do after the meeting?
- How do I fill in the form correctly?
- How can I ensure that my written comments are fair and effective?
- What should I do if the staff member disagrees with something I have written?

Handling difficult situations

- How do I appraise someone I don't get on with?

- How should I handle conflict?
- How should I go about giving very negative feedback?
- What else might be difficult?

Target audience

This course is designed to appeal to people at all levels who have to conduct performance appraisals, whether managing technical or non-technical staff in industry or in practice.

Those who are new to conducting appraisals will find that this course will help them understand the process and techniques required.

More experienced or senior managers will value the opportunity to spend time reviewing their attitude and approach to appraisal and learning new techniques.

Additional services

Pricing: A license to the Accounting and Finance Portfolio ensures that you have year round access to flexible CPD. Prices are based on the number of users.

Tailoring: Ensure the courses meet the needs of your team by tailoring the content. Examples and scenarios featuring your clients and services ensure that every user sees the relevance of the tools and concepts.

Blended learning: Each course has an accompanying half-day workshop. A facilitator's pack provides everything you need to create a fully integrated solution.