

FOR INTERNAL USE ONLY



Guidelines for Performance Management 2007

Managing for Excellence

KPMG LLP (UK)

X • ADVISORY

Appraisal discussions

Pre-meeting

- Review the business plans and how the objectives for your team (at each grade) align to this.
- Review the global skills and behaviours and KLearn development offerings.
- **Audit your own performance management / coaching skills.** How can you refresh your approach?
- **Ensure evidence is comprehensive and specific,** covering the “day” job, goals and including any wider “team” elements. This **includes the appraisee’s self-assessment, Engagement Review Form (ERFs), validated oral feedback (e.g., from moderation meetings), previous Dialogue forms (for early trends), observation.** **If you consider anecdotal evidence, take care with this,** considering whether you can own and corroborate it, the weight to attach to it and whether it supports or conflicts with other more concrete evidence.
- **Consider balance –** positive recognition as well as developmental feedback.
- Think through how you will approach constructive feedback without “fudging” the real message.
- **Consider the other person – what are they likely to be thinking / feeling?**
- Prepare to coach the person regarding their career management.
- Work through the Review of Performance checklist (see page 8).
- Ensure the individual is prepared and knows that their self-assessment will be considered (i.e. you have not pre-determined their rating without the benefit of hearing from them).
- Discuss with colleagues (or your HR business contact) about how to position the discussion if you are unsure or you believe it may be a difficult conversation.
- Consider how you will manage a gap in your / the individual's assessment of their performance?
- Reflect on how you want the individual to leave the meeting and what you need to keep in mind to achieve this.
- Arrange a suitable time and place, giving enough notice prior to the **meeting. You should allow sufficient time for the meeting e.g, two hours, and ensure priority in your diary.** The venue should not be at your desk and should be free of interruptions.