

EXCERPT



Writing Performance Reviews: A Write It Well Guide

How to write performance objectives, reviews, appraisals, and other performance documentation that is clear, descriptive, objective, and acceptable in today's workplace.

A Training Program

TRAIN-THE-TRAINER GUIDE 4th edition

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This *Train-the-Trainer Guide* is to be used in conjunction with the book *Writing Performance Reviews: A Write It Well Guide*. To order the book or additional copies of this guide, please contact Write It Well.

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Introduction

How to Use This Guide

This *Train-the-Trainer Guide* is designed to accompany *Writing Performance Reviews: A Write It Well Guide*, which is a program explaining how to write performance objectives, reviews, appraisals, and other performance documentation that is clear, descriptive, objective, and acceptable in today's workplace.

You can use the book in workshops, for small-group study, or in individual coaching programs. Please note that neither the book nor this guide provide training on your organization's forms, process, or computer application. The focus of this training program is on how to write clear, effective performance objectives and reviews.

Although it's helpful for a trainer to have a background in writing or in teaching written communication skills, it is not essential for success with this program. *Writing Performance Reviews: A Write It Well Guide*, along with this *Train-the-Trainer Guide* and the accompanying PowerPoint slides, provide the content and activities you will need to conduct a successful training program.

The guide is organized into three major units: introductory guidelines to help you prepare for training; step-by-step lesson modules; and an appendix containing checklists, resources, and frequently asked questions.

The five lessons outlined in this guide are designed as modules that can be taught as five units in a program lasting 4 to 5 hours. Each lesson in the guide has an easy-to-follow layout complete with color coding and icons for quick reference during training. Each lesson is also designed so that it can be taught in a workshop or coaching setting. See the Lesson-by-Lesson Guide on page 16 for a detailed explanation of how to work with the lesson plans.

Preparation Equals Success

Ideally, as a trainer or coach, you should spend at least 8 hours preparing for a half day of training when working with new materials. To ensure training success, please read both the primary text for this training program, *Writing Performance Reviews: A Write It Well Guide*, as well as this *Train-*



the-Trainer Guide in full. Then, follow the step-by-step recommendations for how to prepare for training provided in the next section. As a general guideline, plan on at least 2 hours of preparation time for each lesson module.

At Write It Well, we are not only instructional designers, but trainers. We're sensitive to the limited time that workplace trainers have for preparation. But over 25 years of experience has taught us that the more time you spend preparing, the more successful your training program will be. So please read on. In the following pages, you'll find suggestions on how to plan, deliver, and follow up a program to meet the needs of different audiences in different situations.

Characteristics of a Successful Learning Program

Learning programs differ in terms of the number of participants, the length of time available for training, and the needs of both the organization and participants. But all successful learning programs share these characteristics:

- Successful learning programs engage participants in the learning process.

Few people learn new skills simply by reading or listening to a lecture. They learn by thinking about the concepts and information in terms of their own situations and by trying out the new techniques. For writing, that means providing plenty of opportunities for participants to discuss the issues, practice new techniques, and apply the learning to writing projects of their own.

- Successful learning programs are based on clear, relevant behavioral objectives.

Objectives should specify what people will be able to do when the training is complete. Then the objectives serve as a road map for designing the learning program and for measuring its effects. The objectives for a given program depend on the needs of the audience and the organization, and on what you can reasonably accomplish in the time available. If possible, ask participants to begin thinking about their objectives before the workshop begins and then share those objectives (if participants are willing) as part of your opening activities.

- Successful learning programs build on what people already know, and recognize their experiences.

Managers and supervisors write performance documentation already. What they need are tools and techniques that help them write them more easily and effectively. You can encourage participants to draw on their own experience so they can identify what they are doing well and develop the skills they need to improve.

- Successful learning programs use relevant examples and help people apply what they learn to their “real-world” challenges.

People need to see how what they are learning relates to the performance documentation they need to write. In addition to the examples in *Writing Performance Reviews: A Write It Well Guide*, consider providing additional examples. Also provide opportunities for participants to apply what they learn.

The Need for Confidentiality

It's important that the conversations that happen in your workshop remain anonymous, as well as all samples that are used to prepare for and conduct the class. If you plan to collect samples before the class, be sure to tell participants to delete all names from the documentation. Similarly, if you are planning to bring other examples that you've collected, make sure that the documentation does not include any names or identifying details.

Facilitation Guidelines

A successful learning program is one that engages participants and helps them apply what they learn. Below are some suggestions for ways to help the participants get the most out of training and keep the class running smoothly.

- **Encourage questions and discussion.** People learn by asking questions and discussing the way the techniques they're learning apply to specific situations. Encourage discussions, but manage them so they do not go on too long or veer off track. Bring them to a close when the points have been made, when people begin to repeat themselves or go off on tangents, or when the time is up for that topic.

Be prepared to respond to issues and questions that are not addressed in *Writing Performance Reviews: A Write It Well Guide*. There are answers to some frequently asked questions in the Appendix. You might also want to do some additional reading and research on your own so that you feel comfortable with questions. (See the Bibliography at the back of the book itself.)



If someone asks a question you can't answer, you might turn the question back to the class—someone else might have an idea. And you should always feel free to say, “Sorry, but I don't have an answer to that question. I'll do some research and get back to you.”

- **Explain what is not covered in the workshop.** People may come expecting to learn how to run your organization's online performance management program. When you review the objectives at the beginning of the workshop, explain that the focus of this workshop is not how to enter data into an online program, but on how to write effective performance documentation.
- **Vary the way that participants do the exercises.** Instead of asking participants to do all the exercises individually, suggest that they work with a partner or in groups of 3 to 5 to complete some of the activities. Rotate the pairs and groups so people have an opportunity to work with others.
- **Watch the time.** The times indicated in this *Train-the-Trainer Guide* are approximations. The actual time it takes to run a training session depends on such factors as whether you cover all the material and do all the practice exercises, the size of your group, and how inclined the group is to ask questions.

Be sure to leave extra time so that you do not have to rush through anything, leave out the interaction that is crucial to the success of training, or skip over any important content. If you finish a section early, you can always add an activity.

- **Practice.** Before running a training program for the first time, go through each section carefully. Decide which exercises you will ask the group to do in class, which you will use as pre-work or between-session assignments, and which you will leave for people to do on their own. Practice delivering the introductions and explanations, and time yourself. See how long it takes you to do the exercises yourself.
- **Remember that people work at different speeds.** Some participants will finish the practice exercises quickly. Others like to take lots of time and are usually still working when the time runs out.

The best you can do is to try for the middle. Provide additional activities for those who finish early and explain that those who don't have a chance to finish will have an opportunity to complete the assignments on their own (one of the advantages of a self-study program). Explain that it's not always important to finish an exercise to get the full advantage.

The Training Program

Planning a Training Program

Planning a successful training program requires some time and attention. In the following section, you'll find suggestions and guidelines that will get you started. Here is an overview of the steps:

- Learn about your audience
- Review *Writing Performance Reviews: A Write It Well Guide*
- Choose the type of training
- Communicate with participants
- Review participants' samples
- Following up training

Learn About Your Audience

Everyone can learn to write more effective performance documentation. Experienced managers and supervisors need strategies and techniques that build on what they are already doing well, while new managers need a structured process and clear guidelines so that they can develop their skills and increase their confidence.

Begin planning your learning program by finding out as much as you can about what participants already know, and what they need to know. Here are some steps to take:

- Talk with key people in the organization to identify the issues that come up when people write performance documentation.
- Interview stakeholders and/or participants to gather information about participants' objectives for training. (See more in the section on "How to Customize the Course for Your Organization and Audience.")



- Review representative samples of the performance documentation participants write to identify the kinds of problems that need to be addressed (see more in the “How to Customize ...” section).

Review *Writing Performance Reviews: A Write It Well Guide*

Even if you are an experienced writing skills teacher, begin by going through *Writing Performance Reviews: A Write It Well Guide* as if you were a workshop participant. Do the exercises and assignments so you will know firsthand what you are asking the participants to do. Keep track of the time it takes you to complete each exercise. Although this guide includes approximate times for the lessons, you might want to refer to your own times as you plan your program.

After you are familiar with *Writing Performance Reviews: A Write It Well Guide*, study the Lesson-by-Lesson Guide beginning on page ?. You'll see that the Lesson-by-Lesson Guide refers you to specific pages and practice exercises in *Writing Performance Reviews*. Keep the following in mind:

- The workbook icons in the *Train-the-Trainer Guide* indicate the pages of Writing Performance Reviews that your participants will need to use. Insert icon
- When this *Train-the-Trainer Guide* asks you to READ ALOUD a portion of the workbook text, you can ask for volunteers to read. You can also summarize the text in your own words as long as you convey the message accurately.
- The practice exercises in each lesson are indicated by a “practice” icon. Be sure that you are familiar enough with the practices to give participants clear instructions and answer their questions. Insert icon

Choose the Type of Training

You can use *Writing Performance Reviews: A Write It Well Guide* in different types of learning programs, including:

- Workshops and other classroom training

- Small-group training, such as study groups
- Individual coaching programs or tutorials

The type and duration of the program will depend on your audience's needs and learning preferences, and on the time that participants have available.

Workshops and Other Classroom Training

Writing Performance Reviews: A Write It Well Guide can be used as the primary text in a course on writing performance documentation, but it can also be used as a supplementary text in any management training program. A classroom setting gives you the opportunity to explain and expand on the material, and allows students to learn from one another through discussion and group practice. When planning your classroom program, consider these issues:

Schedule the workshop:

- Be realistic about time. It takes at least 4 hours to cover all five lesson modules outlined in this guide while giving participants sufficient opportunities for discussion and practice. If you have less time, focus on the topics that are most important for the group. If you try to cover too much in too little time, you'll spend most of your time talking, and people will learn very little.
- Workshop or class sessions should be at least 1 hour long, and the entire program—not including follow-up activities—should be completed within 4 weeks.
- You can conduct an effective learning program for groups as large as 20–25 people. But the larger the group, the more difficult it is to manage discussions and give people individual attention while they work on their own writing projects. If possible, keep class sizes to a maximum of 15 to 16 people.

Prepare the workshop environment:

- To facilitate discussion and learning, avoid the traditional classroom setting, where everyone faces the instructor. If possible, seat people informally at tables in groups of 3 to 5 (the tables create natural discussion groups). Arrange the tables so that participants can easily see each other, you, and the visual aids.



- Arrange for the room and the equipment you'll need well ahead of time: i.e., a laptop and/or slide projector, two flipchart easels with pads and marking pens, a whiteboard, pens, masking tape, writing tablets, reference books, and name tents. If possible, provide refreshments, especially for classes that begin early in the morning.
- Prepare visual aids—a PowerPoint presentation or flipchart pages—to illustrate the key concepts you'll be teaching. This *Train-the-Trainer Guide* includes a PowerPoint presentation that you can use as slides or print out. Add any others that you think might be helpful.
- Arrive at class early enough to set out the materials, and make sure the equipment is working and the room is set up properly.

Manage the workshop curriculum:

- If your organization has a formalized performance review process, include a review and discussion of that process in your learning program; then show your participants how what they are learning in the book is related to the process. If there are any significant differences between the lessons in the book and your organization's process, be prepared to discuss them.
- If you break the training up into multiple sessions, ask participants to do their reading between class sessions so you can use class time for such activities as discussions, practice, and explaining and reinforcing key points.
- Expect participants to raise issues and ask questions that are not covered in the book. Before the class begins, you might want to do some additional reading and research on your own. And always feel comfortable saying, "I don't know the answer to that question, but I'll find out and get back to you."

Study Groups

Study groups are small groups (usually 3–7 people) who meet for 1 to 2 hours at a time to work together on a learning program. Study groups facilitate the learning process by providing a structure, mutual support, and encouragement. They are excellent ways for team or department members to explore the issues involved in using e-mail effectively and efficiently.

Here are some points to consider about study groups:

- Study groups work best if one person—a group member, a manager, or a training representative—takes on the responsibility of scheduling meetings, reserving meeting space, etc. When possible, study groups should have a private place to meet.
- Group members should do most of the reading and application exercises on their own, using the meeting time to discuss their experiences and observations. The reflection questions in the book can be used to trigger discussion.
- Study group meetings should be held at least twice a week, for a minimum of 1 hour, and attendance should be required (with exceptions made only for real emergencies). At the end of each meeting, members should agree on specific assignments to be completed by the next meeting. The entire program should be completed within 4 weeks.

The group should use the first meeting to establish objectives and set up a schedule, both of which should be written down and distributed to all participants. The group can also use this meeting to discuss the relationship of the learning program to their day-to-day work and career goals.

- One or two follow-up meetings 4–6 weeks after the end of the learning program can help reinforce what people learned and give them opportunities to share ideas for continuing to improve.

Individual Coaching Programs and Tutorials

Individual coaching programs, or tutorials, are a more structured version of a self-study program. They can be supervised by a manager, a training specialist, or even a colleague who has gone through the book and has a good grasp of the material. Coaching programs work best when they are completed within a 4–6 week period and then followed up periodically.

The person who is supervising the coaching program usually does the following:

- Works with the participant to clarify the objectives, agree on assignments, and establish a schedule.
- Remains available to answer questions while the participant completes the assignments.



- Checks in periodically to discuss progress, review the participants' work, etc.
- Follows up in 4 to 6 weeks to help reinforce the learning and discuss remaining issues.

Communicate with Participants

It's a good idea to make contact with the workshop participants before the workshop. You should introduce yourself to the group, ask participants to send you a sample of their writing (or to bring a sample to class), and offer an agenda for the workshop you'll lead.

It's helpful to ask participants to have a sample of their own writing to refer to during the workshop. Ask them to choose samples that have not been edited by anyone else. Explain that the samples will remain confidential—participants will use them from time to time to check their own writing for concepts covered in class.

Engaging people in advance helps participants do the following:

- Tell you what they hope to accomplish in the workshop
- Get “buy in” to the training
- Think about their own writing—what they have trouble with and/or would like to improve
- Have a sample to work on during class which makes the workshop even more relevant.

You can also use the first point of contact as an opportunity to assign pre-work (see the “Consider Pre-Work” section) or to get more information from the group that will help you customize the workshop (see “How To Customize The Course for Your Organization and Audience”).

Consider Pre-Work

Depending on the amount of training time you have available and the nature of your group, you might ask participants to complete some pre-work assignments. Asking people to think in advance about the “what

and why” of training creates a positive and productive framework for the workshop.

Pre-work might include reading selected material or completing selected exercises in *Writing Performance Reviews: A Write It Well Guide*.

Review Participants' Samples

A review of participants' writing when you are planning the learning program helps you determine how to focus the program on their needs. Reviewing their writing during and after the program allows you to evaluate their progress and give them useful feedback.

When you review printed copies of participants' writing, make your comments in pencil, not pen—and certainly not red pen. Also, be sure to write legibly. If you review the writing online, you can use Word's “track changes” feature to insert your comments.

Keep the following in mind:

- Focus on key issues, such as these: are the objectives SMART? (For a definition of the acronym, see Lesson 1.)
- Make your comments specific. Instead of “vague” or “not clear,” ask, “Why do you think that John is lazy?” “How many days late was the report?” or “How could he prepare better?”
- Resist the impulse to edit the writing. Instead, explain what works and what doesn't, and ask the participant to make the revisions.
- Keep all writing samples confidential. Never show any participant's writing to their colleagues as either a good or bad example without the person's express permission.



Customize the Course for Your Organization and Audience

Every organization, every department, and every performance management process is different. While this program was designed to suit the needs of more than one organization, department, and performance management process, you can customize the program to address the particular needs of your audience.

There are a number of ways to customize this course to meet your audience's particular needs. Consider one or more of the following ways:

1. Use the information in the e-mail and survey that you send out (see the “Communicating with the Participants” section) to see if there are trends in participants’ responses, and if what they say in the survey matches what you see in the samples (see more in “Review Participants’ Samples” section). Use your findings to create new or revised PowerPoint slides of your own in advance of the workshop.
2. Collect your organization’s forms and incorporate them into the workshop. Insert slides, create handouts, and develop exercises for the end of Lessons 3 and 4 to guide participants through the process of using what they’ve learned to complete your organization’s forms.
3. Conduct a few internal interviews with stakeholders to find out more about what the participants should learn. Use that information to focus your attention during the workshop.
4. Invite a member of Human Resources, Legal, (or both) to review the workshop design with you, and/or attend the seminar and be ready to answer questions that come up during the workshop.

By having the right person from Human Resources and/or Legal there in the room, you can make sure that all of the participants’ questions are answered. Otherwise, you will not be able to answer all the questions that are asked during the workshop. It’s always OK to tell participants that you’re not a lawyer or the Human Resources representative qualified to answer the questions, but that you’ll find an answer and get back to them.

Consider These In-Class Activities and Exercises

Every training group is different. You might know that your group will work well individually or you might know in advance that in order to make your workshop a success, you'll need to incorporate more group activities.

There are a number of different kinds of activities and exercises that you can add to this workshop. We've offered three of them that you can consider adding.

1. If you have collected samples of your organization's form, distribute them and talk about how to complete them.
2. Ask the group to think about past performance feedback they received that had the greatest impact on them. Ask them to write it down and share it with the class.
3. At the end of lesson two, consider this activity, called Facts vs. Impressions. Ask the group to brainstorm the most common statements they find in performance reviews.
 - a. Capture the information on flipcharts.
 - b. Break the large group into teams and ask them separate the facts from the impressions.
 - c. Bring the group together and ask what they experienced. Find out if they think that by listing the facts first, they will reach a better outcome, and ask whether this approach allows them to express their thoughts more clearly.

Following Up Training

Continuing the focus after the program increases the likelihood that participants will change their approach to writing performance documentation, and that these changes will become permanent. When possible, extend the benefits of training by building in follow-up assignments and activities.

Here are some ways to reinforce what people learn:

- Periodically check in with participants by e-mail or in person to see how things are going and answer any questions they might have.



- Give participants an assignment to complete within 2 weeks of the last scheduled program activity.
- 2 or 3 weeks before the next performance review cycle, send out a list of the “top five things to consider when writing performance reviews” or some other tip or tool that will jog their memory about how to write the most effective documentation.
- After the next performance review cycle is complete, ask people to send you a sample of a review they wrote and return the document with your comments.
- Ask for a sample after the next review cycle, too. Consider meeting with participants to review key learning points, discuss issues, and let them ask questions.



Lesson-by-Lesson Guide

Sample Agenda

Opening: Introduce Yourself and the Course

Lesson 1: Writing Performance Objectives and Standards

Lesson 2: Criteria for Acceptable Performance Documentation

Lesson 3: Using Descriptive Language

Lesson 4: Explaining and Supporting Evaluations and Decisions

Lesson 5: Writing Descriptions That Are Specific and Complete

Closing



Lesson Outlines

This section provides five lesson modules that can be taught either individually or together as a full course. Including the opening and closing (but not including any additional activities and exercises), the entire course requires half a day's instruction, or 4 hours.

Lesson 1 provides the foundation for the course and for each lesson that follows. Therefore, we recommend that you always begin with Lesson 1. Keep in mind that these lesson plans are suggestions for teaching the curriculum; we recommend that you adapt them to your own teaching style and to meet the needs of the group or individual you are training.

Opening (30 minutes)

Lesson 1: Writing Performance Objectives and Standards (45 minutes)

If performance objectives are specific, measurable, action-focused reasonable, and include a timeframe, then employees know how to meet their job requirements. This lesson offers examples, activities, tips, and tools for writing performance objectives that encourage optimal performance.

Lesson 2: Criteria for Acceptable Performance Documentation (30 minutes)

Performance reviews should describe behaviors and results. Keep yourself out of trouble by following some basic legal guidelines. This lesson offers opportunities to identify the reviews that follow these criteria, and reviews that do not.

Break (15 minutes)

Lesson 3: Using Descriptive Language (30 minutes)

An evaluation of a person's performance must be based on observations of behavior and results of performance. This lesson highlights the difference between reviews that feature observations and results and reviews that are based on impressions, opinions, or assumptions.

Lesson 4: Explaining and Supporting Evaluations and Decisions (30 minutes)

Your evaluations and recommendations must be based on facts. This lesson provides strategies for making sure that you've backed up what you say in a review.



Lesson 5: Writing Descriptions That Are Specific and Complete (30 minutes)

A description is only useful if the details it includes answer all the readers' questions. This lesson offers exercises and activities to make sure that your review doesn't leave the reader confused or create any misunderstandings.

Closing

About the Icons

The **green text** in each lesson script indicates what you should say. The **black text** indicates what you should do. The **purple text** indicates that a participant should read from the book or a slide.



pp. 21–22

Turn to the indicated pages of *Writing Performance Reviews: A Write It Well Guide*.



Record items on a flipchart page or whiteboard or refer to a flipchart page that you have already posted.



Ask participants to do a practice exercise.



Read a note or caution.



SLIDE

Show a specific slide.

Opening: Introduce Yourself and the Course

The opening exercise gives you the chance to introduce yourself, the participants, and the content of the course as well as go over the agenda so that you can let participants know what will be covered, the running time for the course, and when to expect breaks.

Estimated Time: 30 minutes

Be sure to place a copy of *Writing Performance Reviews: A Write It Well Guide* and a name tent at each seat before the session begins.



SLIDE 1

When participants enter, Slide 1 should be on the screen. Tell people that the books on the tables are theirs to write in and to take with them after class. They can start to look through them and can spend the next few minutes—while you're waiting for the rest of the participants to arrive and get settled—to read through the Introduction (pages 1–7). You can repeat this message as other people enter the room.

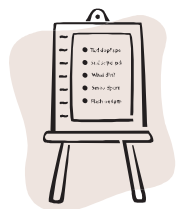


SLIDE 1

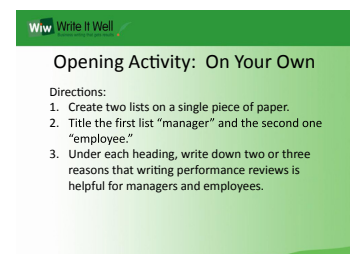
Greet the participants as they enter and ask them to write their names on the name tents you've provided at each seat.

When everyone is seated, introduce yourself and write your name and title on a flipchart page or whiteboard.

SLIDE 2



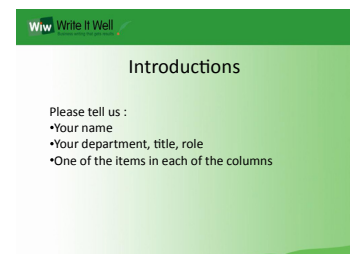
Ask participants to take out a piece of paper and to create two separate lists, one called “manager” and the other called “employee.” Under each heading, ask them to jot down two or three reasons why performance reviews are helpful for managers and why they are good for employees, too. Give participants 3–5 minutes to complete this.



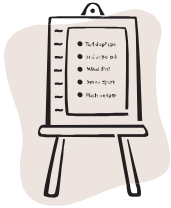
SLIDE 2

SLIDE 3

When participants have completed their list, go around the room and ask each one to introduce himself or herself (if participants come from different departments, they can include this information in their introductions). After they've



SLIDE 3



given their names and departments, ask them to share with the group *one* of the reasons from each of their lists.

As each participant shares an item from the list, record it on a flipchart page or whiteboard. Keep the lists organized in two columns. If a participant repeats an idea previously stated by someone else, place a tally mark next to that item, so you can track any trends in the group.

Your list might look like this:

Manager:

- Informs you about what employees need to do in their jobs
- Helps you avoid many performance problems and handle others before they become serious
- Provides crucial support for Human Resources decisions such as promotions, succession planning, salary increases, or disciplinary actions

Employee:

- Makes sure they know exactly what is expected of them
- Tells them what they are doing well and what they need to improve
- Gives them opportunities to participate in decisions related to their jobs
- Tells them what they need to do to achieve their career goals

After everyone has had a chance to speak, introduce the content of the course.

As you can see, there are lots of good reasons to have performance objectives. Our goal today is to learn how to write performance objectives and reviews that can help improve employee performance.

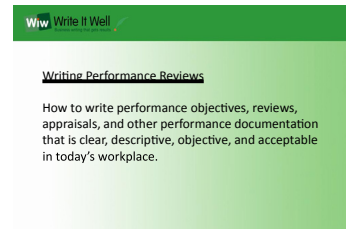
SLIDE 4

Read from Slide 4 as you hold up your copy of the book: *Writing Performance Reviews: A Write It Well Guide*.

Our course today is based on this book, and our focus will be on how to write performance objectives and reviews. This is a course about writing and communication, not about how to use specific software applications.

We'll learn how to write performance objectives, reviews, appraisals, and other performance documentation that is clear, descriptive, objective, and acceptable in today's workplace.

Be prepared to field questions about how participants can learn to use software applications more effectively. Consider coming prepared with a list of courses that participants can take or resources that are available. Keep this conversation very brief.



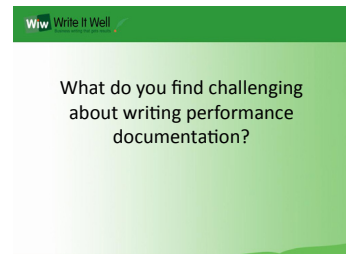
SLIDE 4

SLIDE 5

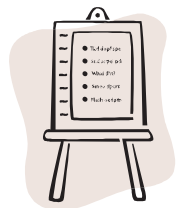
Ask participants what they find challenging about writing performance documentation. Create a flipchart. The list might look like this:

- Write reviews that are clear
- Be specific
- Doesn't look like a form letter
- Want it to be accurate
- Balance good performance with areas that need improvement
- Tie the review to the job description or objectives
- Provide constructive criticism
- Let the facts tell the story
- Know what to include and what not to include

Acknowledge what's difficult about writing performance documentation. Remind people that all forms of writing are difficult. Tell them that learning how to write descriptive performance documentation is a transferable skill: if



SLIDE 5



- **Avoid discriminatory or harassing language: it can lead to a lawsuit.**
- **Avoid jokes, racial slurs, and stereotypes.**
- **Avoid any comment about the person's race, gender, national origin, religion, age, or disability. These are characteristics that are protected by law.**



Ask participants to complete the exercise—on their own—on the bottom of page 37. After a minute or two, ask for a volunteer to tell you which answer they picked and why.

Mention the exercise they completed at the end of Lesson 1, where we acknowledged that more than one person might read the performance objectives they develop. Remind them that there will likely be more than one person reading any performance review, and that different readers have different considerations and different questions. The challenge with performance documentation is that you'll need to answer all of your readers' questions.



Ask people to work on their own to complete exercises (A) and (B) on pages 38, imagining that you're the employee, and on page 39, imagining that you're the HR representative. Give the group 10 minutes to work through the activity. After 10 minutes, ask for a volunteer to walk through his/her questions for (A) and ask for another volunteer to walk through his/her questions for (B). Compare the responses with those in the book on page 40.

Tell people that the book includes a revised review they can read on pages 41 and 42.

Lesson 3: Using Descriptive Language

Estimated Time: 30 minutes

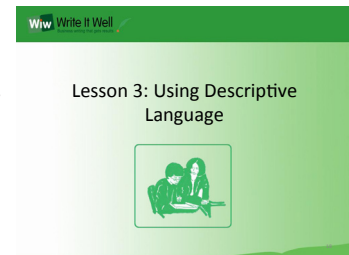
SLIDE 18



p. 45

Ask the group to turn to page 45 to begin the third lesson, Using Descriptive Language. Ask what could happen if you used vague or subjective language in the performance reviews you write.

Draw their attention to the *Try it* section on the bottom of page 45 and ask for a volunteer to read the statements and tell the group which one uses objective, descriptive language.



SLIDE 18



p. 45

- a. **The weather last Saturday was so bad I could hardly make myself get out of bed.**
- b. **Last Saturday, it rained for five hours straight and the temperature never rose above 42 degrees.**

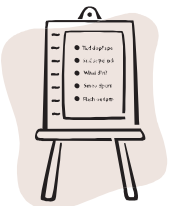
Turn to page 46 and try it again.



p. 46

- a. **Regina's behavior is very professional.**
- b. **Regina organizes her work carefully, sets priorities, pays attention to important details and asks appropriate questions.**

Ask the group to brainstorm a list of subjective words or phrases that you've seen in performance documentation or that you've used yourself.



Compare that list with the one on page 48.



p. 48

Ask for a volunteer to begin the exercise with statements (a) and (b) on the bottom of page 48:

- a. **Mary always waits for someone else to answer the telephone.**
- b. **Mary is lazy and doesn't like answering the telephone.**



Sample Questionnaire

WRITING PERFORMANCE REVIEWS WORKSHOP

Please provide the following information:

1. Your name:
2. Your position:
3. How many people do you manage?
4. What do you find challenging about reviewing employees' performances?
5. Have you ever received any feedback about the performance documentation you write? If so, what was it?
6. What do you want to learn in this workshop?
7. Do you have any questions about the workshop?

Thanks for your help!



Materials and Equipment Checklist

- *Writing Performance Reviews: A Write It Well Guide*: a workbook for each participant
- A laptop computer and projector for showing slides, or an overhead projector for showing transparencies
- A screen for projecting slides or transparencies
- Two flipchart easels with writing pads
- Masking tape for posting flipchart pages
- Colored marking pens for the flipchart pages or whiteboard
- Writing tablets and pens or pencils
- Name tents



Frequently Asked Questions (FAQ)

Q: I'm very busy. How can I take so much time to write performance objectives and reviews?

A: Well-written feedback can improve employee performance. Too often, managers focus on checking the box with this activity rather than using it to really upgrade the team's performance. All athletes rely heavily on recorded performance feedback to improve themselves—employees and workers should take a page from athletes' book, and seek out feedback on work performance. Managers should provide feedback with that same rigor.

Q: I think the entire performance management system here is a problem and we should fix it.

A: Often, this type of training can lead to participants' complaining about the current system, or trying to turn the workshop into a brainstorming session around how to improve the system. If participants veer off into these system-improving discussions, start by brainstorming the issues. Ask the participants, "What are all of the issues you have with delivery of performance reviews?" This brainstorming process will give participants a chance to vent their frustrations. You can then review those issues and clearly delineate which of them have been—or will be addressed—in the training. You should tell the group that all other items are in the "parking lot" and will be shared/discussed with an HR rep later. Addressing this issue early on helps to keep the training on track.

More questions?

E-mail us at
info@writeitwell.com



Other Write It Well Resources

Professional Writing Skills: A Write It Well Guide

Effective Email: Concise, Clear Writing to Advance Your Business Needs

Develop and Deliver Effective Presentations

Reports, Proposals, and Procedures

Land the Job: Writing Effective Resumes and Cover Letters

Writing Performance Reviews

Please let us know if you'd like more information about this *Train-the-Trainer Guide* or any of our other publications and services.

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