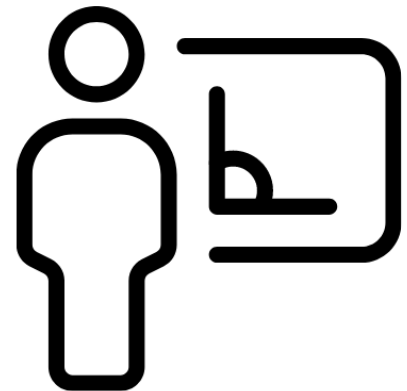


# Instructors Guide



On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



*My grandfather once told me that there were two kinds of people: those who do the work and those who take the credit. He told me to try to be in the first group; there was much less competition.*

***Indira Gandhi***

## Module Two: How to Conduct Annual Reviews



An annual review can help you keep your employees happy, engaged, and focused. It is human nature to want to succeed, so by offering your employees feedback on their positive and negative attributes, you are guiding them on their pathway to success. A poorly designed annual review can have the reverse effect. In this module, we will discover how to conduct a well-designed employee annual review.

### Develop the Process



A well-developed annual review process can help strengthen your employees and your company. Reviews help employees see their strengths and weaknesses, and can be a great way to recognize them for their great work and let them know what needs to be improved. Here are some ways to develop your annual review:

- **Put thought into your evaluation-** You should decide what it is you are wanting to convey to your employee, what message you are wanting them to leave with. Many times, these evaluations are rushed, but your employees need to know that the evaluation is important, because they are important.
- **Set categories-** Decide what categories of the job are going to be included in the employee evaluation.
- **Set benchmarks for the categories selected-** Take the time to decide what the benchmarks should be for the set categories. Make sure to do research, the benchmarks should be realistic.
- **Location, location, location-** Take the time to find a place that is private, and not too sterile. You want the employee to be comfortable, and don't want to have the whole office eavesdropping.

- **Have an agenda-** Having an agenda helps relieve some anxieties an employee may be having about the review. Your agenda should include:
  - **Past Performances-** What the employee’s performance was the previous year or years
  - **Current Performance-** What the employee’s current performance is.
  - **Next Year’s Goals-** What new goals or benchmarks you'd like the employee to meet.
  - **Game plan-** The plan that you are going to utilize in order for the employee to correct any problems, and meet the future set goals.
- **Have periodic reviews** - You don’t want to go a whole year and have an employee suddenly find out they are not performing to the best of their abilities. You want to prepare them before an annual evaluation, so have periodic evaluations throughout the year. This way, the employee can understand what they are doing correctly, and what needs work before their annual review. These periodic evaluations help the employee to change whatever is prohibiting them from being the best they can be. They also help you as a supervisor determine if additional training is necessary.
- **Decide the appropriate paperwork-** Decide what paperwork you will need for the review. This could include job descriptions, your periodic reviews, etc.
- **Get organized!** - Make sure you have the employee’s records organized so that the annual review is not traumatic for the employee or reviewer.

Other little tips for your review process:

- **Get it together!** - Make sure you have all of your paperwork ready before the meeting. No one likes their time wasted because someone was ill prepared.
- **Get and give feedback-** Give feedback to employee about the areas in which they are excelling and need work on, but also give them the opportunity to give you feedback on what you excel at and need to work on.
- **Don’t be tardy!** - When conducting employee evaluations, you should try to make sure you do it within a few weeks of their anniversary. It is easy to get side tracked, but these evaluations are a priority!
- **Encourage self-reflection-** Allow the employee to tell you what they think they do well, and what they think they need work on. It can help your employee learn the value of self-assessment, but also show them how much you value their opinions.
- **Encourage venting-** Give the employee the opportunity to address any comments, concerns, or suggestions that they may have.
- **Be straightforward with negative feedback-** Give constructive criticism, it’s not always easy, but it will help everyone in the long run.

<b>Estimated Time</b>	<b>13 minutes</b>
<b>Topic Objective</b>	Introduce understanding the importance of periodic evaluations and how to

	develop the process of conducting annual reviews.
<b>Topic Summary</b>	Surprise review Discuss understanding the importance of periodic evaluations and how to develop the process of conducting annual reviews.
<b>Materials Required</b>	<b>Flipchart/board and marker, Paper</b>
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	Individually, take a moment to do a quick outline on what you would use as an annual review. It can be very basic. Once complete, as a group discuss the different steps for developing an annual review process.
<b>Stories to Share</b>	Share any personal or relevant stories.
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	What can periodic evaluations help supervisors determine?

## Set Benchmarks Early



It is important when you are performing annual reviews, that the employees know what is expected of them. Setting a benchmark is how you can show your employees what you and your company expect of them. So, what is a benchmark? A benchmark is a baseline standard that you or your company sets for your employees. A benchmark could mean that your employee has to have a certain quality of work, rate at which a function is processed, a number of units completed, or any combination of these. Employees should be aware of the benchmarks that are set, as soon as possible. A great way to notify new employees of benchmarks is to include them in the orientation or initial training. Keep in mind though, that there is a lot of information given to employees during orientation / initial training, so it's advisable to periodically remind your employees of the standards they are expected to meet.

<b>Estimated Time</b>	<b>8 minutes</b>
<b>Topic Objective</b>	Introduce understanding benchmarks and their importance in annual reviews.
<b>Topic Summary</b>	Benchmarks

	Discuss understanding benchmarks and their importance in annual reviews.
<b>Materials Required</b>	<a href="#">Worksheet 1: Benchmarks</a>
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	Complete the worksheet individually, discuss the results.
<b>Stories to Share</b>	Share any personal relevant stories.
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	How often should employees be reminded of their benchmarks?

## Agreement with Set Benchmarks



Now that you understand what a benchmark is, you can determine appropriate benchmarks to set. It is important when setting your benchmarks that you, your company, and employees feel like they are reasonable benchmarks. Your company wants to have optimal productivity, so the benchmark needs to be high enough to facilitate the minimum standards of the company's expected productivity.

Employees need to feel like it's not impossible to meet the standard; setting the benchmark too high can make employees feel insecure, underappreciated, and cause job dissatisfaction. So how can you make sure everyone is in agreement with the benchmarks? There are several ways to do this, however the most successful way is to create a committee. Forming a committee of employee representatives and upper management can help you make sure that everyone is onboard with the benchmarks. Keep in mind when you are setting these benchmarks that they are meant to be a baseline standard, and the goal is for employees to meet and surpass the benchmark.

<b>Estimated Time</b>	<b>8 minutes</b>
<b>Topic Objective</b>	Introduce understanding the importance of everyone agreeing on the set benchmarks.
<b>Topic Summary</b>	Agreeing with Benchmarks  Discuss understanding the importance of everyone agreeing on the set benchmarks.
<b>Materials Required</b>	<b>Flipchart/board and marker</b>
<b>Planning Checklist</b>	None

<b>Recommended Activity</b>	As a group, discuss the benchmarks set by your company. If there are none, discuss benchmarks that could be set. Have you ever worked for a company that set an unreasonable benchmark? Share experiences, if applicable.
<b>Stories to Share</b>	Share any personal, relevant stories.
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	What is the goal when setting a benchmark?

## Hold an Effective Meeting



Meetings are imperative to any supervisor and employee relationship. Meetings are the venue to notify employees of new benchmarks, policies, procedures, and to show recognition. While meetings are standard in almost every company, a lot of supervisors have problems holding an effective meeting. Here are the dos and don'ts to aid in having an effective employee meeting.

- **Have a clear purpose.** Identify the reason for the meeting, and stay on track. An awesome way to make your purpose clear is to include an agenda. An agenda helps keep you on track, and makes sure that everything needed to be discussed is addressed. It is easy to go off on a tangent and forget to discuss other pressing business, so stick to the agenda!! Agendas also help attendees remember what was addressed at the meeting.
- **Invite the appropriate staff.** When you are going to have a meeting, make sure your attendees really need to be there. You don't want to have a meeting about one particular department and require the whole company to attend. Just as you don't like to have your time wasted, neither do your employees, so be respectful.
- **Keep it short!** No one wants to be stuck in a meeting for hours on end. Hit your points, make sure there aren't any questions, and move on!
- **Be punctual.** A meeting needs to have a start time and an ending time. Be sure to stick with the schedule. Going over on a meeting causes your employees to quit listening to you and start focusing on the clock instead.
- **No distractions.** It's a great idea to outlaw technology in a meeting. Having one of these devices in a meeting can turn an employee's attention from you to their device. If they aren't going to pay attention, what is the point of the meeting?
- **Any questions?** Not everyone is comfortable asking questions in front of a group. Save a little time at the end for people to personally come up to you and ask questions. This allows the employee to voice any questions they may have about the material shared, and feel safe doing so.

<b>Estimated Time</b>	<b>8 minutes</b>
<b>Topic Objective</b>	Introduce understanding how to hold an effective meeting.
<b>Topic Summary</b>	Employee Meetings. Discuss understanding how to hold an effective meeting.
<b>Materials Required</b>	<b>Flipchart/board and marker</b>
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	As a group, share personal stories of a time when you attended an employee meeting that had gone awry. What made the meeting an ineffective meeting? Is there a time where you were a part of a well-run employee meeting? What made it so successful?
<b>Stories to Share</b>	None
<b>Delivery Tips</b>	Encourage everyone to participate.
<b>Review Questions</b>	Why is it important to allow for one-on-one questions at the end of a meeting?

## Practical Illustration



Ursula is a new employee at the Preppy Bean coffee company. She was very excited to get this job, she has heard it is a great place to work. She works in the customer service department, which deals mostly with receiving and entering orders, and handling customer complaints. Walter is the supervisor of the department. His employees respect him a lot because he always tells them their strengths and weaknesses when it comes to job performance. He gives regular evaluations, annual employee reviews, and knows the benefit of retraining when necessary. Ursula has heard so much positive feedback about her new boss Walter, and has had the opportunity to receive feedback from him as well. He has expressed to her on numerous occasions how much of an asset he feels like she is to the company. When he gives her criticism, it is constructive and he always has a solution to the problem. Because of all of the positive feedback, Ursula has no problem voicing her questions or concerns.

## Module Two: Review Questions

1.) What can a well-developed annual review process do for the employees and the company?

- a) Strengthen the company
- b) Help employees see what they need to work on
- c) Help give recognition to employees
- d) All of the above

A well-developed annual review process can help strengthen your employees and your company. Reviews help employees see their strengths and weaknesses, it is a great way to recognize them for their great work and let them know what needs to be improved.

2.) \_\_\_\_\_ should be given *throughout* the year.

- a) Annual Evaluations
- b) Periodic Evaluations
- c) No Evaluations
- d) All of the above

Periodic evaluations should be given throughout the year, with an annual review to summarize the year. This way the employee can understand what they are doing correctly, and what needs work before their annual review.

3.) What is a benchmark?

- a) A minimum requirement of performance
- b) A seat
- c) A mark that is on a park bench
- d) The highest achievement a person can achieve

A benchmark is a standard of performance that you or your company sets for employees. It is a base line for employees to meet. The goal is for the employees to meet the set benchmarks and excel further.

4.) What criteria does a benchmark not entail?

- a) Specific quality of work
- b) Speed in which work is processed
- c) An annual review
- d) Quantity in which work is processed

A benchmark could mean that your employee has to have a certain quality of work, rate at which a function is processed, the number of units completed, or any combination of these.



5.) Which is the most successful way to make sure everyone agrees on a benchmark?

- a) Online poll
- b) Have a committee
- c) Make the decision yourself
- d) Ask your neighbor

There are several ways to make sure everyone is in agreement with the benchmarks, however the most successful is a committee. Forming a committee of employee representatives, and upper management can help you make sure that everyone is onboard with your benchmarks.

6.) Who needs to agree on the benchmarks?

- a) Supervisors
- b) Employees
- c) Vice Presidents of the company
- d) All of the above

It is important when setting your benchmarks that you, your company, and employees feel like they are reasonable benchmarks. Your company wants to have optimal productivity, so the benchmark needs to be high enough to facilitate the minimum standards of the company's expected productivity. Employees need to feel like it's not impossible to meet the standard. Setting the benchmark too high can make employees feel insecure, underappreciated, and cause job dissatisfaction.

7.) Meetings are a great venue for what?

- a) Notifying employees of new policies
- b) Singling out employees for poor performance
- c) Discussing personal issues
- d) All of the above

Meetings are the venue to notify employees of new benchmarks, policies, procedures, and to show recognition.

8.) What types of technology should you outlaw from your staff meetings?

- a) Cell phones
- b) Tablets
- c) Computers
- d) All of the above

It's a great idea to outlaw technology in a meeting. Regardless of if it's on purpose or not, we are all glued to our phones and electronic devices these days. Having one of these devices in a meeting can turn an employee's attention from you, to their device.

9.) \_\_\_\_\_ can help you keep your employees happy, engaged, and focused.

- a) Feedback
- b) An annual review
- c) Accolades
- d) None of the above

An annual review can help you keep your employees happy, engaged, and focused.

10.) A well-developed \_\_\_\_\_ can help strengthen your employees and your company.

- a) Workforce
- b) Benchmark
- c) Annual review process
- d) All of the above

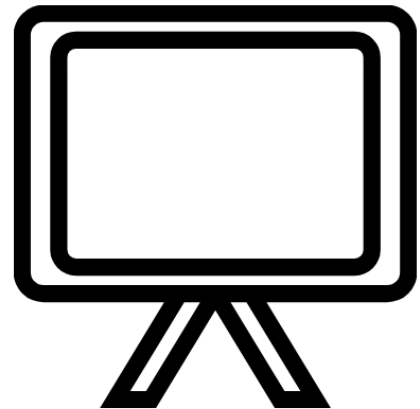
A well-developed annual review process can help strengthen your employees and your company.

# PowerPoint Slides



Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide.

PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.





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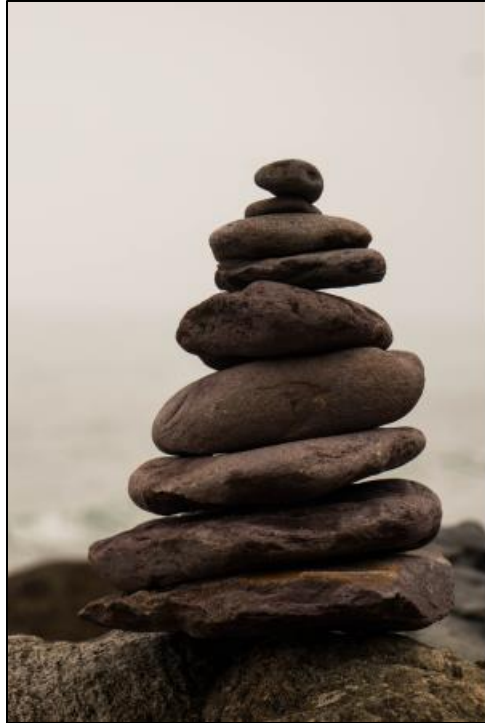
*My grandfather once told me that there were two kinds of people: those who do the work and those who take the credit. He told me to try to be in the first group; there was much less competition.*

*Indira Gandhi*

## MODULE TWO

# How to Conduct Annual Reviews

It is human nature to want to succeed, so by offering your employees feedback on their positive and negative attributes, you are guiding them on their pathway to success.



## Develop the Process

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Reviews help employees see their strengths and weaknesses, and can be a great way to recognize them for their great work.

## Set Benchmarks Early

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Setting benchmarks show your employees what you and your company expect of them.





## Agreement with Set Benchmarks

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A benchmark needs to be high enough to facilitate the minimum standards of the company's expected productivity.

## Hold an Effective Meeting

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- Have a clear purpose
- Invite the appropriate staff
- Keep it short



## Practical Illustration



- Develop The Process
- Set Benchmarks Early
- Agreement With Benchmarks
- Hold an Effective Meeting

## Module Two: Review Questions

1. What can a well-developed annual review process do for the employees and the company?

A. Strengthen the company

B. Help employees see what they need to work on

C. Help give recognition to employees

D. All of the above

# Quick Reference Sheets



Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.





# Conducting Annual Employee Reviews Quick Reference Sheet



## How to Conduct Annual Reviews

An annual review can help you keep your employees happy, engaged, and focused. It is human nature to want to succeed. Giving your employees feedback on their positive and negative attributes is part of the pathway to success. A poorly designed annual review can have the reverse effect. Together, we will discover how to conduct a well-designed employee annual review.



## Set Benchmarks Early

It is important when you are performing annual reviews, that the employees know what is expected of them. Setting a benchmark is how you can show your employees what you and your company expect of them. So what is a benchmark? A benchmark is a baseline standard that you or your company sets for your employees. A benchmark could mean that your employee has to have a certain quality of work, rate at which a function is processed, a number of units completed, or any combination of these. Employees should be aware of the benchmarks that are set, as soon as possible. A great way to notify new employees of benchmarks is to include them in the orientation or initial training. Keep in mind though, that there is a lot of information given to employees during orientation / initial training, so it's advisable to periodically remind your employees of the standards they are expected to meet.



## Agreement With Set Benchmarks

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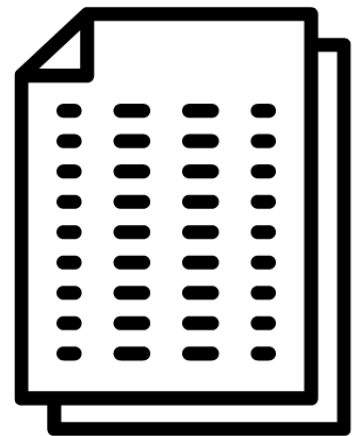
# Handouts



Each course is provided with a wide range of worksheets.

Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.



## Sample Worksheet 1

# Benchmarks

Instructions: There are 4 scenarios below. With each scenario, there are 2 different benchmarks. Select the benchmark that you feel is most appropriate for the scenario.

Remember that a bench mark could mean that your employee has to have a certain quality of work, rate at which a function is processed, a number of units completed, or any combination of these.

- 1.) The Dust-off Cleaning Company wants to increase the number of homes they clean per year. They decide to set a benchmark on the number of rooms each employee has to clean per hour. After doing some research, they found out that the average cleaning person can clean a regular sized room in 45 minutes.
  - Benchmark A- Each cleaning person cleans a room in 30 minutes or less.
  - Benchmark B- Each cleaning person cleans a room in 1 hour or less.
  -
- 2.) Curtains-R-Us is a company that makes curtains worldwide. They currently make an average of 1200 curtains a week. On a good day, they can make over 3000 curtains. The company wants to increase their production in order to meet demand requirements.
  - Benchmark A- They increase their daily projected rate to 1800
  - Benchmark B- They increase their daily projected rate to 2800
  -
- 3.) Crazy Crafting Supply Company is a chain of retail stores for crafting supplies. The stores want to increase sales. On a usual day, an employee can make anywhere from \$3,000-\$5,000 in sales.
  - Benchmark A-Sales of \$8,000
  - Benchmark B-Sales of \$4,000
  -
- 4.) The Junior Hedgehogs is a youth basketball team of a local church. They fundraise every year to raise money for uniforms and transportation to and from the games. Last year they made \$1800 selling cookies. The year before that they made \$1200 selling candy bars. This year they have decided they want to sell both candy bars and cookies.
  - Benchmark A-Sales of \$15,000
  - Benchmark B- Sales of \$1,500

1.) B 2.) A  
3.) B 4.) B

## **Icebreaker: Categories**

### **PURPOSE**

To help participants get to know each other.

### **MATERIALS REQUIRED**

None

### **PREPARATION**

Prepare a list of categories, such as:

- Favorite color
- Favorite season
- Number of siblings
- Astrological sign
- Shoe size
- Favorite subject in school

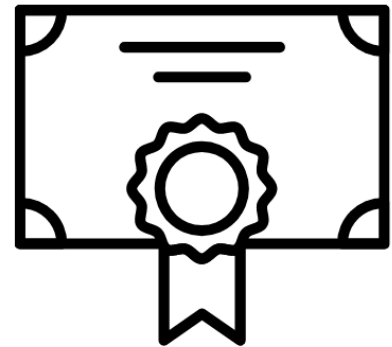
### **ACTIVITY**

Ask participants to stand. Say that you are going to ask them to arrange themselves by different categories. For example, you might say, "What is your favorite color?" Participants will look for other people who share their favorite color and form groups. Once everyone is in a group, ask the groups to identify themselves. Repeat the activity with four or five different categories.

# Certificate of Completion



Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION

**[Name]**

*Has mastered the course  
Conducting Annual Employee Reviews*

Awarded this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Presenter Name and Title

\_\_\_\_\_