

*Linking one-to-one
Appraisals
to team meetings*



part of
2waytrust
Leadership

February 2009

Aim: ➡ A single team, open and honest with each other and performing to a higher standard

Through: ➡ Real discussions in one-to-ones

➡ One page written outcomes note from each appraisal, on the record

➡ No scoring

➡ Team meeting to discuss key outcomes and agree how best to support each other more in driving up performance

➡ Agreeing our top team challenges, on the record, and a timetable for meeting them.



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Introduction

Linking Appraisals to Team Meetings:

A new approach towards improving the performance of our team

As you know I am hoping to have a one-to-one appraisal with each of you during the next few days. I am conscious that appraisals represent an important time commitment for us all, which is why I'm sending you this note now to explain that I want to approach appraisals in a slightly different way to ensure that as a team we gain maximum benefit from all of the effort that we are putting into them.

Once I have completed the appraisals with members of the team I want us to have a special team meeting for up to one hour to discuss what's come out of the appraisals and whether there are any changes that we need to make in the way we work together in response to the messages I'll have taken away from you.

So I hope you will have a chance to read this document before our one-to-one, and in particular will have a chance to think about the questions on pages 8 -10 that I want to ask so that we can make best use of the 45 minutes or so that I will be spending with each of you.

With the whole economy going through such a deep recession at the moment, it is more important than ever that we as a team are hungry to be the best. I hope that each of you will work with me to make a success of these appraisals, so that we can go from strength to strength in the coming months.

Key principles



1. The main purpose of linking one-to-one appraisals to team meetings is to support teams in improving their overall performance

Each appraisal is intended to support you in improving your personal performance, whilst asking whether you could do any more to improve overall team performance by sharing your particular gifts more widely with other members of the team.

The whole emphasis is on looking at the impact of our behaviour on each other and drawing on the insights that this should give us to improve our performance.



2. There's no scoring system

You will see that there won't be any scores for these appraisals. We all know that scores so often get in the way of honest discussions and often result in many high performers becoming demoralised if they receive anything less than the top score.

The problem with scoring systems isn't just that they encourage people to present themselves in the best possible light. It's also that they often result in the scorers spending far too long **justifying** the score they have given and not enough time exploring with individuals how they might help to improve performance through changes in their behaviour.

I expect that these appraisals will be more challenging and useful without scores, and look forward to hearing what you think once we have been through the process together.



3. Anything said during one-to-one appraisals and the team discussion is 'off the record'. Only my outcomes note and our agreed top challenges are 'on the record'

Another problem with appraisal systems based on scores is that they tend to be on the record from the moment the appraisal starts. This means that people usually go into the appraisal feeling that they have to watch every word they say, for fear that something might be 'taken down and used in evidence against them' at some later stage.

In the approach that we will be using, it is only the written outcomes of one-to-ones and the top team challenges that are 'on the record'. Apart from them everything else is off the record, including the discussion among the team following the one-to-ones. This means that we can explore some difficult issues openly with each other knowing that **nothing anyone says will be the subject of careless gossip.**

The other key requirement for the success of these appraisals is that we all need to be careful to assume the best of each other. I am sure that we will achieve a great deal if we can make a point of living this principle, whilst speaking off the record.

4. The one-to-one appraisals are based on the principle of self-assessment

For each of the questions in your personal appraisals, I will use the words on pages 9 and 10 to open up the discussion.

Where we take it from there will depend upon the answers that you give.

5. Linking appraisals to team meetings is designed to achieve greater two-way understanding between team leaders and team members

One of the principles behind linking appraisals to team meetings is that we need to understand each other better if we are to work together in driving up team performance. This requires us all to commit to as much plain speaking as possible.

I very much hope that we will judge these appraisals according to what they help us to achieve, both individually and as a team.

6. Appraisals and team discussions work best when the set-up of the room is informal, so that chairs are set out in a circle

This is a very practical point. For the one-to-ones I will make sure that the chairs are set out in an informal way, and for the team meeting at the end I have asked that there should just be a circle of chairs with no tables in the middle.

Introduction to the one-to-ones

As you know from the key principles, everything that you say during your appraisal will be off the record. It's extremely important that you feel you can say whatever you need to say to me, knowing that I will not repeat anything that could compromise your trust in me.

If you say something that I want to follow up with another member of our team or a senior colleague outside of the team, I will make a point of agreeing how we are going to take that forward - knowing that we have an overriding responsibility to maximise our performance.

During the course of the appraisal I will write down a small number of phrases that remind us of the key issues we have been discussing.

Because this note will be on the record, I will show it to you at the end of the appraisal and then sign and date it.

I will bring these outcomes notes to the team meeting after our one-to-ones and pass them round. It's an important principle that we as a team need to become more open with each other, and by sharing the appraisals we will be underlining how important each of you are to the success of the team as a whole.

At the end of the team meeting, I will invite you to keep a copy of the outcomes note from your own appraisal and hand back the others.

Afterwards, I will write up a brief overall note reflecting on the key strengths of the team and the areas of improvement that we have set ourselves. I will copy this round the team, and then recirculate it when we go through this process again so that we can make some tough judgements about how many of our top challenges we have actually met.

Key questions for the one-to-ones

For you to think about beforehand:

- 1** Thinking about your contribution to our team, which aspects would you say are the most distinctive - and how might you share them more widely among the team?
- 2** Can you describe one of your worst moments in recent weeks - and the lessons you learnt from it?
- 3** What are you okay at that you think you might be able to do better?
- 4** How could the rest of the team support you more?

At the appraisal, I will say:



1 For all of us, there are quite a number of things we're good at and a small number where we can be exceptional.

What I want to ask you first (and I hope you won't be taken over by any false modesty!) is whether you can think of one or two things that you're exceptional at in your job.

(after a little discussion)

Building on what you've just said, can you see any scope for sharing your particular gifts more with others in the team?



2 I deliberately started by asking about what you're exceptional at, because that's so important - just as it's also important to have a sense of what we're not so good at as well.

We all have some unhelpful 'old habits' that get in the way of closer working unless we make a point of seeking the support of others for leaving them behind.

This is why I want to ask if you could tell a story of an occasion during the past few weeks when something went quite badly wrong for you. What are the main lessons that you take away from that experience?





3 We all know there are aspects to our jobs that we do well enough not to be criticised, even though we're just doing them okay - and could probably do them quite a lot better.

Can you give an example of a situation where you were just okay?

Looking back, HOW do you think you might have been better?



4 It's nearly always possible for members of a team to give each other more support than they do.

Can you think of any ways in which I and other members of the team could support YOU more?



Outcomes Note

2WayTrust Appraisal for:

Outcomes note (expressed as key phrases):













Signed by the team leader:

Date:

Sharing the key outcomes as a team

Each one-to-one appraisal is extremely important in its own right. At the same time, the one-to-ones are also a warm-up for what is in some ways the most distinctive aspect of this new approach towards appraisals, and that is the time I want us to spend **as a team** discussing the key points that each of you took away from your appraisal.

At the team meeting I will pass round copies of the written outcomes of each appraisal, so that you have a chance to refer to them during our discussions. The fact that they are expressed just as phrases means that you might want to ask a few questions to get behind what they're really saying.

I will start the team meeting by asking,



What do you each see as the most important personal challenge arising from your appraisal?



In answering this, you don't need to limit yourself to what is written on your outcomes note. Please trust your instinct in deciding what to pick out as your key personal challenge to share with other members of the team.

There might, for example, be something that occurred to you **after** the appraisal that you want to share with the team.

Once we have had some discussion about the key outcomes that you took away from your appraisal, I want to move on and ask you:



Knowing what you now know about what came out of the appraisals for the team as a whole, is there any way in which you could see yourself supporting other members of the team more, either in helping them to manage some sort of weakness or 'blind spot' better or just in playing to their own strengths that much more?



This is when we should all realise that a team-based discussion about how we might support each other more really comes into its own. For the simple truth is that teams sometimes behave badly because various members have got themselves into a mindset in which they think some unhelpful behaviours of theirs can't change because "they are as they are".

I want us to have a very different approach and to make it okay for us to discuss the impact of our behaviour on each other, on the basis that we are all **open to change**.

What I'm hoping we can achieve at this session is a sense of real openness and plain speaking. If someone has shared some sort of weakness of their own, there can surely be nothing better than for someone else in the team to volunteer to work alongside them in helping them to manage it.

And if we find ourselves discussing a key strength of another team member that coincides with something you're not so good at, wouldn't it be **great** if you felt able to ask for their support to help you get up to speed.

In my view, it's a real sign of strength for someone to disclose a weakness in a team meeting, so long as it's on the basis that they intend to do something about it.

We all have our own shortcomings, and the more open we can be about them the stronger we will be as a team.

This is essential if we are to identify the key challenges that really would enable us to improve the team's performance - sooner rather than later.

Top challenges for our team

During the final minutes of our discussion, I will say what I see as the most important challenges that have emerged for us as a team. I hope we can agree on a small number for us to concentrate on together over the next few weeks.

I would like us to set challenges that we can meet within the next month. Where there are longer-term challenges than this, I hope we will agree **milestones** that need to be achieved within a few weeks, so that we can meet again in a month's time and take stock of progress.

I am keen that we should all agree on our top challenges and if you think that anything I say is wrong, I do hope that you will say so. At the same time, I hope that as a team we will relax about the fact that we don't all need to agree on everything. If one or two have a slightly different view of what the top challenges should be, that needs to be okay - and it might be that these should be the subject of our next meeting.

A new habit

Very finally, I want to stress that I don't see this team discussion about performance as something that we're doing just to keep others in the organisation happy.



It's about **what we expect of ourselves**.

For us to achieve some real improvements in performance, we need clear challenges that we can all sign up to. That's what I hope we will come up with. And in the process I hope that we'll create for ourselves a new habit of assuming the best of each other and working more closely together as a joined-up team.

Top challenges for our team

This summary is made available to Directors and Senior Managers as appropriate, on the basis that top performing teams are open in their commitment to continuous improvement and discussing those aspects of their performance where they intend to make improvements.

It is filled in by the team leader. There is space for notes under each one so that the team can be as specific as possible about how they intend to meet it.

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Signed by the team leader:

Date: