



HR DELIVERY

Making Sure HR Delivers

HR DELIVERY WORKSHOP SERIES

Performance Management

An introduction to performance management

Explore how clear expectations, useful conversations and balanced evidence connect everyday work with organisational priorities. Practise selected performance management decisions and prepare a focused first application using the seven-stage PERFORM Framework.



01 DAY

Introductory taster

IN-HOUSE

Your people. Your context.

PRACTICAL

Explore, discuss and apply

A PRACTICAL STARTING POINT

Understand the topic. Try it in practice.

Performance management becomes useful when people understand their contribution and can discuss progress while there is still time to act. This introductory day explores the connection between expectations, evidence, feedback and fair decisions, using everyday work examples to reveal where apparently complete processes can miss important problems.

Introduce the seven-stage PERFORM Framework through one team scenario. Participants practise writing expectations, preparing a check-in and identifying evidence for review, then choose a manageable improvement to explore with colleagues after the workshop rather than attempting a complete system redesign.

WHO IS IT FOR?

HR professionals, people managers and team leaders who support goals, check-ins or reviews and want a practical introduction to connecting these activities. No previous framework experience is required.

BY THE END OF THE DAY, PARTICIPANTS CAN:

- | | |
|---|--|
| 01 Connect role and purpose
Explain how a team priority translates into role contribution, including results, working practices and relevant shared responsibilities. | 02 Clarify expectations
Draft one useful expectation with success evidence, quality safeguards and support needs that a manager and employee can discuss. |
| 03 Select balanced evidence
Distinguish representative performance evidence from isolated impressions, considering results, behaviours, contribution, adaptation and capability in a simple example. | 04 Practise a check-in
Use a short conversation structure to explore progress, hear the employee perspective and agree a proportionate next step. |
| 05 Separate decision purposes
Recognise how development, formal review and reward decisions require clear purposes, appropriate evidence and responsible human judgement throughout. | 06 Choose a first improvement
Identify one process weakness and propose a small application with an owner, evidence needs and a useful review point. |

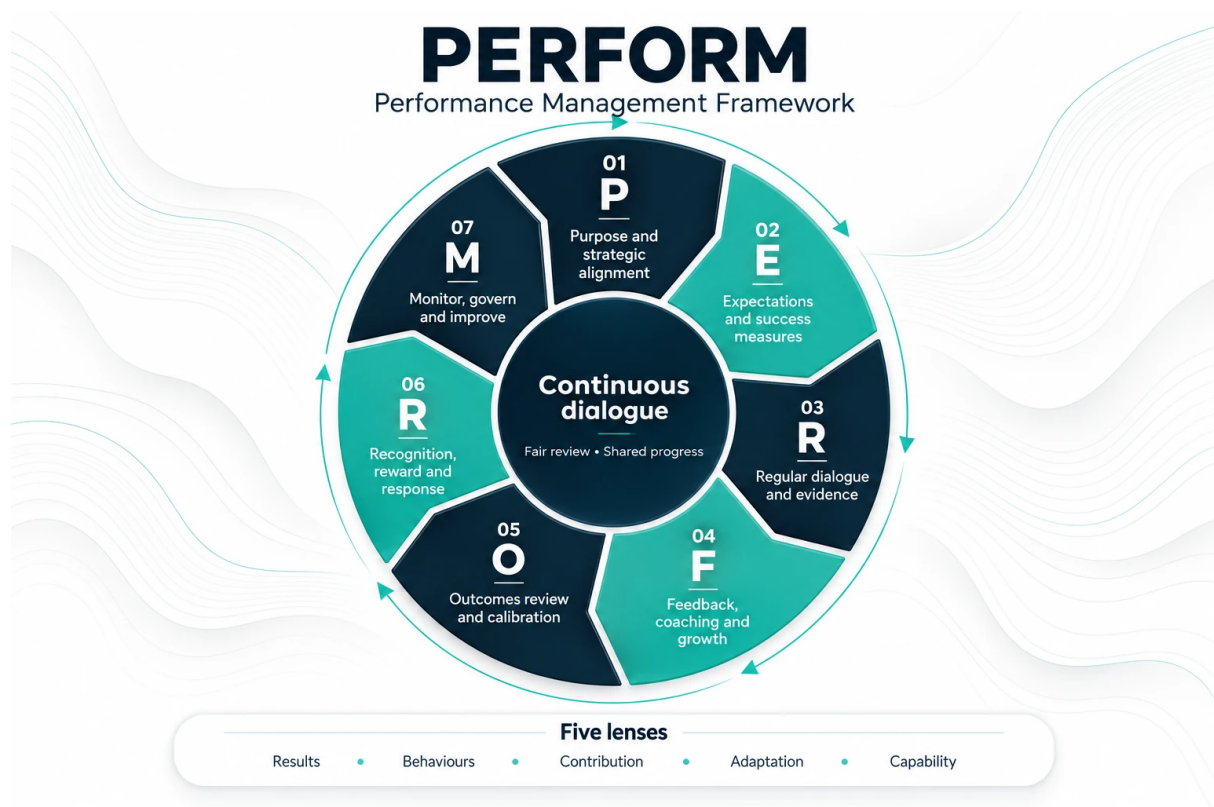
A useful first application

A one-day introduction to selected performance management decisions. Participants create practice drafts and identify questions for further work; the day does not deliver a complete performance system or individual assessment.

THE FRAMEWORK / WORKSHOP FOCUS

PERFORM Framework

The seven-stage PERFORM Framework connects strategic purpose, expectations, regular dialogue, feedback, outcomes review, recognition and governance. The six prompts below select workshop focus questions within that full cycle.



SIX QUESTIONS TO EXPLORE IN THE WORKSHOP

01 Purpose and contribution

How does this role contribute to the team outcome?

02 Expectations and evidence

What would useful success evidence and appropriate safeguards look like?

03 Dialogue and support

What should a check-in reveal about progress and support?

04 Feedback and growth

Which specific feedback could help someone improve their work?

05 Review and response

How should evidence inform review, recognition and proportionate responses?

06 Governance and improvement

How will we check whether the process helps people contribute?

These six workshop focus questions do not replace or rename the seven PERFORM stages. The original artwork retains the complete framework; exercises sample decisions that participants can begin practising during one introductory day.

[Explore the full model >](#)

LEARN BY DOING

Explore. Challenge. Make the ideas useful.

Short explanations lead into lively exercises, paired discussion and small-group challenges. Participants test ideas, share experience and build a draft together. The tone is engaging and enjoyable, with time to reflect and connect learning to real work.

01 Repair the target

Teams compare a volume target with customer feedback, identify the behaviour it encourages and rewrite the expectation with quality safeguards, dependencies and an evidence source.

02 Build the evidence basket

Participants sort short evidence cards across the five performance lenses, challenge gaps and distinguish useful observations from unsupported impressions before preparing a balanced review note.

03 Rehearse a useful check-in

In rotating manager, employee and observer roles, participants explore a missed milestone, practise listening and agree support, recording what made the conversation clearer or less useful.

04 Trace a process weakness

Groups trace one recurring problem across the seven stages, choose a small change and explain how they would know whether it improved the employee experience.

DIAGNOSE BEFORE YOU ACT

Evidence > shared feedback > agreed priorities

Use selected diagnostic prompts to distinguish known facts from assumptions. Discuss the findings and agree their meaning before proposing a solution. Feedback is part of diagnosis, not an afterthought.

ONE CASE, DEVELOPED THROUGH THE DAY

An internal service team closes requests quickly but receives repeated follow-up queries. Managers praise closure volumes, while employees say guidance is unclear and complex cases receive little recognition. Quarterly reviews contain activity totals but limited evidence of resolution quality, teamwork or the support needed to improve.

Groups revise one expectation, prepare a check-in and identify the evidence a fair review would need, separating individual contribution from barriers requiring a wider team response.

THE FACILITATOR WILL

- Invite different perspectives.**
- Make assumptions visible.**
- Welcome constructive debate.**
- Capture practical learning.**



SAMPLE WORKSHOP AGENDA

A working day, with room to think.

09:00-16:30 | Six hours of facilitated learning, plus lunch and breaks. The agenda, emphasis and timings are always agreed with the client, including local scheduling needs.

09:00-09:20	What makes performance useful? Compare current experiences, establish the day's purpose and identify the difference between process completion and useful performance support.
09:20-10:15	Explore the PERFORM cycle Walk through the seven stages and connect a team priority with the contribution expected from one role.
10:15-10:30	Break
10:30-11:30	Write clearer expectations Repair the case target, specify quality safeguards and identify the support and shared responsibilities that affect delivery.
11:30-12:30	Gather balanced evidence Sort evidence through the five lenses, challenge unsupported impressions and identify what remains missing before a review.
12:30-13:30	Lunch
13:30-14:30	Practise a check-in Rehearse a conversation about progress and barriers, then use observer feedback to improve listening and the agreed next step.
14:30-14:45	Break
14:45-15:30	Connect review and response Consider how evidence informs review, development and recognition, keeping the purpose and authority of each decision clear.
15:30-16:10	Test a small improvement Use the case to trace a process weakness, propose a manageable change and challenge its assumptions with peers.
16:10-16:30	Plan the first application Choose one workplace conversation, identify the people involved and record what to check before testing a small change.

Follow one service outcome from role expectations through useful dialogue to fair review and improvement.

FROM THE SESSION TO YOUR DESK

Useful models. Practical working records.

The day combines reference materials with drafts developed in the exercises. Each has a clear use beyond the workshop; the work reflects the evidence and perspectives available in the room.

01 PERFORM reference guide

A concise reference to the seven stages, five performance lenses and selected workshop questions, with space to record where further exploration is needed.

Use it to explain how everyday performance activities connect.

02 Expectation practice draft

A worked expectation linking role contribution, evidence, safeguards, dependencies and support, developed from the case and reviewed for clarity by another group.

Adapt its questions when agreeing expectations for one role.

03 Evidence sorting worksheet

A completed practice worksheet distinguishing observations, assumptions and missing information across the five lenses, with prompts for checking relevance and the review period.

Check whether your next review includes sufficiently balanced evidence.

04 Check-in conversation prompts

A brief conversation guide practised during the workshop, covering progress, employee perspective, barriers, support and agreed actions without prescribing a universal meeting frequency.

Prepare a focused check-in that reflects the actual work.

05 Process improvement sketch

A case-based sketch showing one process weakness, its links across PERFORM, a possible response and the evidence needed to judge a small trial.

Discuss one process improvement with its owner before testing.

06 First application plan

A personal thirty-day plan identifying a practical starting point, colleagues to involve, information to confirm and a review question for the first application.

Keep your first application focused on one useful change.

CONTINUE EXPLORING

Continue with the models, diagnostic manuals and development resources on the HR Delivery website. Workshop exercises provide a first application; a full organisational diagnostic or implementation assignment can be agreed separately.

[Open the framework >](#)

[Explore diagnostic resources >](#)



MAKE THE LEARNING COUNT

A better conversation. A practical next step.

After the workshop, participants can use the prompts with one team or role, checking existing policy and manager expectations first. A small conversation or revised expectation provides a practical starting point for learning before any wider process change.

YOUR FIRST 30 DAYS

01

Days 1-7

Choose the first setting

Discuss your draft with a manager or HR colleague. Agree one role or team context, confirm the relevant policy and identify the question that most needs clarification.

02

Days 8-21

Try a useful conversation

Prepare and hold an appropriate check-in using the prompts. Capture agreed expectations, support and actions, then ask whether the conversation helped the employee understand what to do next.

03

Days 22-30

Review and refine

Review the first application with the process owner. Identify what became clearer, what evidence remains weak and whether to refine the approach, gather more information or test another conversation.

Follow-through is participant-led. Additional facilitation, a full diagnostic or specialist support can be agreed separately.

AVAILABLE IN-HOUSE

Shaped around your organisation

The client and facilitator agree the in-house day, audience and priority performance issue. Participants may bring anonymised goal or review examples and relevant process guidance, excluding personal employee records; the illustrative case supports those without suitable examples.

PLAN YOUR IN-HOUSE WORKSHOP

Talk to Dr Phillip Welsh

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Discuss your workshop



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