



HR DELIVERY

Making Sure HR Delivers

HR DELIVERY WORKSHOP SERIES

Performance Reviews and Appraisals

An introduction to performance reviews and appraisals

Prepare balanced performance reviews that bring together agreed expectations, representative evidence and employee perspective. Practise a review conversation and a simple calibration exercise, then identify improvements to preparation, records and follow-up.



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.

A formal review brings a period of work together, but its quality depends on the expectations, dialogue and evidence that came before it. This introductory day helps participants prepare a balanced appraisal, discuss differences in perspective and explain judgements without allowing recent events or confident opinions to dominate.

Introduce practical preparation and conversation habits for a useful performance review. Participants organise evidence across the review period, practise explaining a judgement and test consistency with peers, then draft a development follow-up while respecting their organisation's review policy and decision authority.

WHO IS IT FOR?

Managers, team leaders and HR professionals who prepare, conduct or support performance reviews. The workshop is suitable for new reviewers and those seeking a structured refresher on everyday appraisal practice.

BY THE END OF THE DAY, PARTICIPANTS CAN:

- 01 Clarify the review purpose**
Explain the purpose of a review and distinguish developmental discussion from any separate administrative decisions under the organisation's policy.
- 02 Organise period evidence**
Build a simple evidence timeline against agreed expectations, recognising changed priorities, relevant context and gaps across the review period.
- 03 Challenge judgement risks**
Identify where recency, unsupported comparison or a single strong impression could distort a practice appraisal and propose a corrective question.
- 04 Conduct a review discussion**
Practise sharing an evidence-based judgement, inviting the employee perspective and exploring a difference in interpretation with clarity and respect.
- 05 Compare standards fairly**
Use a simple calibration exercise to compare how standards and evidence are applied without forcing identical outcomes or rating quotas.
- 06 Agree useful follow-up**
Draft a concise review summary and development action that connect to the discussion, clear responsibilities and a realistic follow-up date.

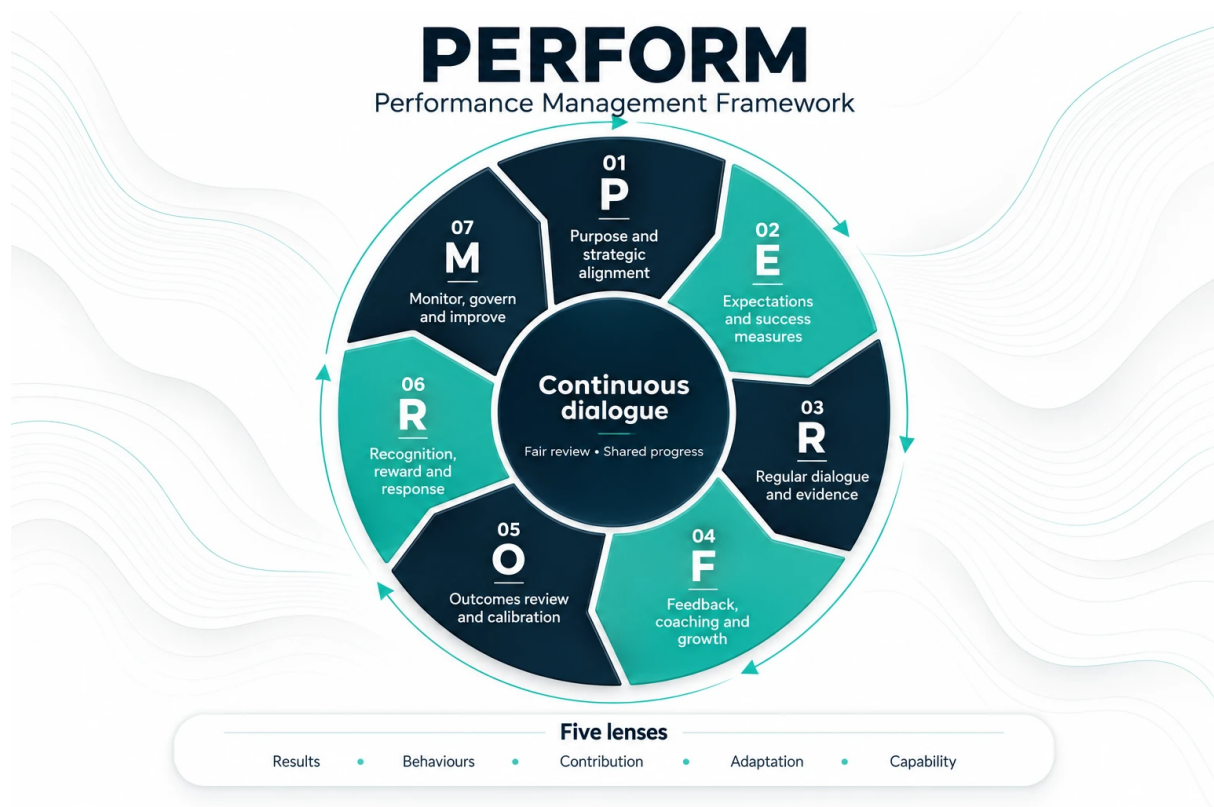
A useful first application

An introductory practice day focused on preparation, conversation and consistency. It does not replace organisational policy, accredit reviewers or establish final ratings, pay decisions or formal employee relations outcomes.

THE FRAMEWORK / WORKSHOP FOCUS

PERFORM Framework

The seven-stage PERFORM Framework places formal reviews within an ongoing cycle. Six workshop focus questions explore review preparation, evidence, perspective, judgement, calibration and follow-up without replacing the full model.



SIX QUESTIONS TO EXPLORE IN THE WORKSHOP

01 Review purpose

What should this review establish, and which decisions remain separate?

02 Period evidence

What representative evidence covers the full period and agreed expectations?

03 Employee perspective

How will the employee contribute evidence and challenge inaccurate information?

04 Reasoned judgement

How can we explain the judgement and its important limitations?

05 Consistent standards

Are reviewers applying comparable evidence standards while recognising justified context?

06 Useful follow-up

What development, support or clarification should follow from this review?

These six prompts focus the workshop on Outcomes review and calibration and its connections to the other PERFORM stages. They do not change the seven-stage framework or prescribe a universal rating system.

[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 Build the review timeline

Groups arrange evidence cards across a review period, mark a midyear priority change and identify which expectations apply when, before drafting a balanced summary of contribution.

02 Spot the judgement shortcut

Pairs examine short appraisal comments, identify unsupported comparisons or overreliance on recent events and rewrite each comment so the reasoning can be checked against relevant evidence.

03 Practise a review discussion

Triads rehearse a review with differing manager and employee interpretations, using observer feedback to improve explanation, listening and agreement on facts that still need checking afterwards.

04 Hold a calibration huddle

Small groups compare two fictional review judgements against shared standards, challenge inconsistent reasoning and record justified contextual differences without introducing a forced ranking or predetermined rating distribution.

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

A project coordinator delivered several difficult launches early in the year, then missed a reporting deadline after priorities changed. The manager's draft appraisal centres on that recent incident. The employee highlights additional coordination work, while another manager rates a comparable contribution differently without explaining the evidence standard used.

Groups organise the full-period evidence, revise the appraisal rationale and rehearse a review conversation, then compare the judgement with a second case to test consistency of standards.

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 a review useful? Clarify the review's purpose, compare participant experiences and identify how preparation affects the quality of the conversation and follow-up.
09:20-10:15	Reviews within the PERFORM cycle Connect formal review with expectations, regular dialogue and growth, explaining how the six workshop questions relate to seven stages.
10:15-10:30	Break
10:30-11:30	Assemble full-period evidence Build the case timeline, mark changed expectations and identify evidence gaps before drafting a balanced account of the employee's contribution.
11:30-12:30	Explain a reasoned judgement Challenge appraisal shortcuts and practise writing comments that connect an interpretation with relevant evidence, standards and acknowledged context.
12:30-13:30	Lunch
13:30-14:30	Practise the review conversation Rehearse sharing a judgement and hearing the employee perspective, then improve the discussion using specific feedback from an observer.
14:30-14:45	Break
14:45-15:30	Calibrate the reasoning Compare fictional judgements against common standards, record justified differences and distinguish calibration from forced ranking or predetermined rating quotas.
15:30-16:10	Record outcomes and development Draft a concise review summary and practical development action, checking ownership, support needs and the purpose of any separate decisions.
16:10-16:30	Plan the next review Select a preparation improvement, identify the policy or evidence to check and record a realistic first application and review point.

Bring the whole review period into an evidence-based conversation, consistent judgement and useful follow-up action.

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 Review preparation checklist

A concise checklist covering review purpose, agreed expectations, period evidence, employee input and relevant policy, with prompts for identifying gaps before the conversation takes place.

Prepare the information and questions needed for one review.

02 Full-period evidence timeline

A completed case timeline showing work across the review period, changes in expectations and gaps requiring clarification, supported by prompts for checking representative evidence fairly.

Avoid allowing the latest event to dominate a review.

03 Judgement rationale worksheet

A worked appraisal rationale connecting standards, evidence and context, with revised examples showing how unsupported labels or comparisons can be replaced by more explainable reasoning.

Check whether an appraisal comment explains the judgement clearly.

04 Review conversation guide

A practised discussion guide covering the manager's rationale, employee evidence, differences in interpretation and next steps, accompanied by observer feedback from the classroom role exercise.

Rehearse a difficult part of your next review conversation.

05 Calibration question sheet

A question sheet for comparing the use of standards and evidence across fictional cases, including reminders to record justified context and avoid forced rating distributions.

Support a more careful conversation about consistency between reviewers.

06 Review follow-up draft

A case-based summary and development action with ownership, support and timing, plus a personal plan for improving one aspect of preparation or follow-up after the workshop.

Connect the review discussion to an achievable development step.

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.

Participants can use the preparation checklist before one scheduled review, inviting employee input through the established process. Discuss calibration and recording practices with HR, then evaluate whether the revised preparation and follow-up made the conversation clearer and more useful.

YOUR FIRST 30 DAYS

01

Days 1-7

Prepare across the period

Select an upcoming review and check the relevant policy with HR or your manager. Assemble expectations and representative evidence across the period, then identify what the employee should help clarify.

02

Days 8-21

Practise and conduct

Rehearse the most difficult part with an appropriate colleague. Conduct the review when scheduled, invite corrections to the evidence and record the rationale, agreed support and next development action.

03

Days 22-30

Check the follow-up

Check progress on the agreed development or support action. Ask whether the review was clear and useful, then discuss any recurring evidence or consistency issues with the responsible HR colleague.

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 and relevant appraisal arrangements. Participants should review their current process, rating guidance if used and an anonymised review example; fictional cases provide all evidence needed for the exercises.

PLAN YOUR IN-HOUSE WORKSHOP

Talk to Dr Phillip Welsh

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Discuss your workshop



www.hr.delivery