

HOW TO...

...Be prepared

Ben Robinson, a graphic facilitator at Meeting Magic, offers some important guidelines on appraisals.

Personal development reviews or appraisals are essentially a conversation based on continuous improvement. The aim of an effective personal review should be to praise, motivate, inspire and improve performance. If carried out effectively, you should both have an opportunity to contribute, listen, learn and plan - the output of which will be a more informed partnership driving forward.

Preparations for this type of meeting should definitely be completed by your line manager. However, if you, as the person being 'appraised', can also make time to give the meeting some thought and do a little planning, then you will be rewarded by a more productive conversation.

So, what should you do when planning a discussion?

Focus on the purpose. Why is this conversation taking place? Write it down and make sure you keep referring back to it before, during and after the meeting. For example, it may include preparing for a smooth transition through a period of change, team development, salary changes, or enhanced performance next year.

Consider your aim. What output would you like to leave the discussion with? This might be physically, mentally or emotionally in terms of your thoughts and feelings or those of others also involved in the conversation.

Plan what you'd personally like to get out of the conversation. When you leave your appraisal you might want a decision, some commitment, an action plan, agreement on a way forward or to have challenged your line manager. You might want to feel motivated to do the job better, be inspired to aim for promotion or you may be looking for commitment to actions that will contribute to your personal growth.

Plan the chunks. What topics of conversation need to be covered? If you are going to achieve your aim and stick to the purpose of the discussion, then you need to plan the chunks

of conversation to hit that target.

During a personal development review you might want to consider:

Your achievements – what have you successfully implemented or delivered since your last appraisal? This gets the conversation off to a positive start, showcases your work and highlights the impact you've had on the business.

Your challenges – have there been barriers that have stopped you delivering more and have affected your performance? Most leaders appreciate honesty, reflection and positivity. Use this meeting as a chance to reflect and highlight any problems, twist them into future positives and challenge your partnership to overcome them next time. If there are issues between you and your boss, now is the time to raise them.

Your plans – moving forward, where do you see your role? This is an opportunity to focus on the future, a chance to plan and show you are committed to enhancement. It's also a great moment to showcase some creative ideas, innovations or suggestions.

Your development – what personal development would you benefit from in order to effectively deliver your plans? This is your chance to grow, so make sure you've given this some thought. You could consider a qualification, a training programme, courses, 1-1 coaching, internal or external job shadowing, some delegated new projects or a sabbatical.

Get the words right. What words will influence the conversation? Vocabulary is ultra-important. Get it right and your conversation will go like a dream, get it wrong and you may feel like you are talking to a brick wall! This is even more important during an appraisal, because it's all about you. Think about you and your line manager. Are you results orientated? Do you think about the numbers and targets? Do you put people first? If you and your line manager are similar, then this might prove positive. If

you are very different, you should think about changing the words and meanings you use when manoeuvring through the conversations to suit them.

Drive the conversation. How can you keep on topic and meet the purpose? You probably know the person you are planning the conversation with, so think about them as a person. Are they likely to drive the conversation or let it meander? Will they keep to an agenda and finish on time or will it end when it ends? Are they likely to go into the minute detail or hover over the main points? Are they likely to tell you what's on their mind or might you have to ease it out of them?

During your appraisal you might want to consider manipulating your style to suit as this will make for a more comfortable, fluid and productive discussion.

Plan to take notes and summarise. What should you make a note of and why? One of the biggest complaints about ineffective appraisals is when nothing happens afterwards. This is especially true if nothing is agreed and written down. So, make sure someone summarises, ensure you both agree and circulate the actions.

In terms of the appraisal, make sure you get any actions, development, changes and support written down and copied to your line manager. This will enable you to focus on it over the coming months and keep reminding your boss of their part too!

Although this article focuses on personal development reviews or appraisals, many of the hints can also be used to get the most out of other types of meetings. To begin with, pick one or two of the hints and gradually blend them into your personal meeting routine. Try to be comfortable, confident and positive but most importantly, ensure you are yourself.