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PHOENIX TS

# How to Write Legal Employee Evaluations and Disciplinary Documents Training

## Course Overview

With this training on How to Write Legal Employee Evaluations and Disciplinary Documents, participants will discover how to conduct a well-designed employee review. By determining the categories for an annual review and understanding how it affects employee compensation, an overall increase in performance should be seen throughout your organization.

## Course Objectives

- To recognize the importance of having a performance review process for employees.
- How to work with employees to set performance standards and goals.
- Skills in observing, giving feedback, listening, and asking questions.
- An effective interview process and the opportunity to practice the process in a supportive atmosphere.
- How to make the performance review legally defensible

## Course Outline

### Performance Appraisals Done Well

- To start, participants will discuss what performance appraisals are and why they are important. The importance of building trust will also be covered.



## Errors We Make

- This session will explore the three most common errors made during performance appraisals.

## Types of Performance Reviews

- Next, participants will learn about the most common types of performance appraisals: formal reviews, informal reviews, probationary reviews, and 360 degree reviews.

## The Performance Management Process

- To begin, participants will look at the four-stage performance management process through a lecture. Then, participants will work in small groups to review some sample appraisal forms.

## Goals with SPIRIT

- During this session, participants will learn about the SPIRIT acronym for goals. They will also learn about setting short-term and long-term goals.

## The Performance Management Cycle

- This session will explore the first two stages of the performance management cycle: the basis for review and performance standards. BAR's and KRA's will also be discussed briefly.

## Setting Standards

- Participants will learn about the importance of standards through a short exercise.

## Creating a Performance Development Plan

- Another key element in the performance management cycle is a performance development plan. Participants will learn about the components of this type of plan during this session.

## Feedback and Communication

- This session will provide participants with some basic feedback and communication tips.



## Listening Skills

- Next, participants will take a closer look at listening skills.

## Communication Strategies

- In this session, participants will learn about asking good questions, probing techniques, and body language.

## Giving Feedback

- This session will cover the six characteristics of effective feedback. To reinforce these concepts, participants will apply these characteristics to three case studies.

## Accepting Criticism

- Next, participants will learn how to accept criticism graciously.

## Planning the Interview

- This session will look at some things that participants should do before delivering the performance appraisal.

## The Interview

- In this session, participants will learn a basic interview format and practice it through a role play.

## Goal Setting Role Play

- Day Three will start with a role play on the first stage of the performance appraisal process: goal setting. This role play will be followed by discussion and feedback from the trainer and other participants.



## Providing Feedback

- This session will ask participants to complete a role play on the second stage of the performance appraisal process: providing feedback.

## Coaching

- Next, participants will learn about the third stage of the performance appraisal process: coaching. Participants will also practice coaching in a role play.

## Appraisal Preparation

- In this session, participants will prepare for a mock appraisal.

## The Interview

- Next, participants will conclude the performance appraisal process with a mock interview.

## Maintaining Performance

- Once an employee has achieved a particular level of performance, we usually want them to maintain that level. This session will explore some ways of doing that.

## Handling Performance Problems

- During this session, participants will learn what to do if an employee is not achieving a particular level of performance.

## The Part Where Someone Gets Fired

- In this session, participants will learn what steps to take when someone needs to be let go. Participants will also have an opportunity to practice their skills in a role play.

## Pre-Assignment Review

- To sum up the past three days, participants will look at their pre-assignment, identify areas of



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improvement, and develop an action plan.

### Performance Management Checklists

- To conclude the workshop, participants will review some checklists that they can use during the performance management process.

### Workshop Wrap-Up

- At the end of the course, students will have an opportunity to ask questions and fill out an action plan.

**Starting at \$2,000**

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## Disciplinary Documents Training

- 1 days instructor-led training
- How to Write Legal Employee Evaluations and Disciplinary Documents Training training book
- Notepad, pen and highlighter
- Variety of bagels, fruits, doughnuts and cereal available at the start of class\*
- Tea, coffee and soda available throughout the day\*
- Freshly baked cookies every afternoon\*