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PHOENIX TS

# How to Write Legal Employee Evaluations and Disciplinary Documents Training

**Due to Covid-19 safety restrictions** PhoenixTS will temporarily be unable to provide food to our students who attend class at our Training Center; however, our Break Areas are **currently open** where students will find a constant supply of Coffee, Tea and Water. Students may bring their own lunch and snacks to eat in our breakrooms or at their seat in the classroom or eat out at one of the many nearby restaurants.

## 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 improvement, and develop an action plan.

## Performance Management Checklists

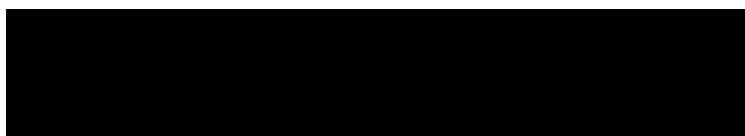
- To conclude the workshop, participants will review some checklists that they can use during the performance management process.

## Workshop Wrap-Up

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

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Starting at **\$2,000**



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## Included in this **How to Write Legal Employee Evaluations and 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\*