**Sample Annual Appraisal Narrative**

**SUPERVISOR COMMENTS ON EMPLOYEE’S PERFORMANCE**

Pat continues to perform outstanding work for our office. This year, along with other senior staff members, Pat spent considerable time mentoring our three newest staff members, showing a sustained willingness to explain policies and procedures, tease out options, partner on client contacts, and review documents. Colleagues trust and appreciate Pat’s advice and opinions. As a result, our newest staff members have been performing quite well. Pat has made great progress on three procedural guides (two completed, one in final draft stages) and colleagues are already using them to great effect.

Pat has gone above and beyond with providing training and consultations for our office’s new system, holding over a dozen small group workshops in assigned departments and performing follow-up presentations on several related topics when it became clear through consultations that other issues or needs were brewing in those areas. Pat has taken the lead in the new program training, helping to coordinate our staff’s involvement in the program, and is receiving excellent feedback and glowing comments from participants.

Pat is artful in communicating and working with colleagues, supervisors, students, and other staff on campus, and can be both gentle and firm as appropriate in providing viable options to clients while making sure they are aware of their own obligations and responsibilities. Pat is committed to all parties being treated with respect and given the opportunity to be successful. This year, Pat volunteered to serve as a liaison to three other campus departments in order to facilitate our groups working better together, resulting in clearer and more consistent communication between the groups.

We hope that Pat continues to grow and serve as a positive ambassador of our office to the campus community.

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**Effective Talent Conversations**

As an individual leader, you are in the best position to influence and develop talent – or shut it down. One of the simplest yet most effective ways to develop others: do the talent conversation right.

A talent conversation builds a relationship that allows managers to influence others toward improved performance, development and positive outcomes. Talent conversations can happen at any time. We recommend holding quarterly talent conversations (see NinerTalent STAKES Timeline), with one of the most critical moments falling during the annual performance appraisal.

Remember: a talent conversation is not done to someone but with someone. To guide the discussion, it helps to follow six steps:

1. **Clarify the goal.** What is the purpose of the conversation? What exactly does each of us want to accomplish?
2. **Explore the issues.** Assessing strengths, vulnerabilities, development needs and performance enhancement. Identifying motivation and career aspirations.
3. **Identify the options.** Generate ideas and opportunities for learning and improvement.
4. **Set expectations.** What do we want to do first? Next? What are the obstacles?
5. **Motivate.** What support is needed? Are you sure the goals are meaningful?
6. **Identify the plan.** How will we know you are on target? How will we track outcomes?
It is also important to understand who you are engaging with in a talent conversation. Managers need to be prepared to have four types of talent conversations, each focusing on a different key message:

### 1. The Top Talent Conversation.

**The message:** future investment.

Individuals who clearly meet or exceed expectations and deliver superior results are top talent. These are the individuals who are seen as the future leaders of campus. During the conversation with top talent, you should:

- Recognize the person’s high performance level and perceptions of his or her leadership abilities and potential.
- Focus on how to provide him or her with the skills and experiences needed for future roles.
- Discuss future aspirations, goals and desired development.
- Find out what motivates him or her and what you and the organization can do to ensure that the employee stays with the organization.

### 2. The Solid Performer Conversation

**The message:** maintaining or building value.

Solid performers are typically individual contributors who are valued by the organization, but could take on more responsibility. During this conversation you should:

- Recognize the person’s solid performance level and accomplishments.
- Convey that he or she is appreciated and well placed, with potential to grow in his or her current position.
- Focus on how the person can improve in his or her current position, staying aware that new opportunities may arise in the next one or two years.
- Learn how you can best engage and retain this individual.

### Common Talent Conversation Topics: Coaching for Success

1. Stretch Goals
2. Career/Succession Planning
3. Innovation & Buy-In
4. Process Improvement
5. Strategic Planning
6. Situational Leadership
7. Performance Management
8. Goal Setting & Achievement
3. The Potential Performer Conversation

**The message:** short-term success.

Potential performers are individuals who may not have had enough time in their role to show significant results, but are expected to bring a lot to the role they are in. During this talent conversation, the focus is on ensuring a successful transition by:

- Sharing your perceptions that the person has high leadership potential.
- Identifying any performance concerns or expected challenges.
- Focus on the steps that he or she needs to take over the next three to six months, identify how you could provide support, and discuss how to remove or mitigate any barriers to success.

**Common Talent Conversation Topics: Coaching for Improvement**

1. Trust, Accountability, & Credibility
2. Interpersonal Communication
3. Work/Life Balance
4. Self-Management & Procrastination
5. Organization & Space Management
6. Emotional Intelligence
7. Email/Communication Etiquette
8. Goal Setting & Achievement

4. The Underperformer Conversation

**The message:** improve performance.

Underperformers are people who are not meeting expectations. The talent conversation should remain focused on the here and now, rather than future options, new tasks or additional responsibilities. During the conversation with an underperformer you should:

- Clearly identify concerns about performance and potential – be clear about why his or her performance needs to be improved.
- Focus on performance issues before addressing concerns about potential.
- Concentrate on actionable next steps required for the individual to be successful in his or her role for the next three to six months.

**Six Rules to Follow when Giving Constructive Criticism:**

1. Tackle the problem rather than the person.
2. Understand the goal of offering criticism and share this with your colleague.
3. Focus on tackling actionable issues.
4. Process the issues at hand and do not make assumptions.
5. Empower colleagues with specific and honest feedback.
6. Eliminate words such as but, however, and although in your conversation.
Sample Talent Conversation Questions

Employee’s Past Performance

1. What are the top 3 to 5 highest priorities of your job this past year?
2. What do you consider to be your greatest strengths and struggles this past year?
3. What do you consider to be your most noteworthy efforts and accomplishments this year?
4. What environmental or other factors that impacted your job this year?
5. What do you like most and least about your job? How can you make the best of the least (and the best, even better)?

Employee’s Growth-Mindset Driven

1. What can I (as your supervisor) do to help you do your job more effectively in the future?
2. How can I assist in furthering your career growth?
3. What do you feel are going to be our biggest challenges this year?
4. What training, development or resources do you want/need to be successful?
5. What would you like to say 12 months from now that you currently cannot say? How can I help support you?
6. What would you like to accomplish this year? How can I help you get there?

Questions for the Supervisor:

Your Purpose & Growth-Mindset Driven Questions

1. What do I expect from my team/employee?
2. What do I value in employees?
3. What are positive and negative actions others can choose to take that strengthen or weaken a relationship with me?
4. What can my employees expect from me?
5. What do I feel are my strengths and struggles?
6. What areas am I working on personally (me) and professionally (team)?
7. What do I feel are going to be my/our biggest challenges and successes in the upcoming year?
8. How can we best navigate/celebrate these challenges and successes?

Remember, a lot of what is considered talent management happens in meetings and behind closed doors. Where it often succeeds or fails is in the personal interactions managers have with their talent. This is especially true during uncertain times when you need engaged employees, and employees need good reasons to be engaged.