CONCEPT

Performance Appraisal and Probation Period Management for Managers and HR

Performance Appraisal and Probation Period Management for Managers and HR

Technical depth: Practitioner · **Practical mode:** Role-play

Introduction

Appraisal ratings that cluster at the top, probation periods that end by default and difficult feedback that is never given leave organisations unable to reward strong performers or act on weak ones. Unsupported ratings and undocumented probation decisions also become the weak point in later disputes. This Core Concept course equips managers and HR to run probation reviews and appraisals on evidence, with calibrated ratings and well-handled conversations. Through repeated role-plays of real appraisal and probation meetings, participants build an Appraisal and Probation Toolkit for their own team or organisation.

Course Objectives

- Diagnose the organisation's current appraisal practice using rating distributions and policy review
- Convert job descriptions into measurable objectives and behaviourally anchored performance standards
- Plan and run probation reviews that end in a documented confirmation, extension or termination decision
- Conduct appraisal conversations that give specific feedback and agree a development plan
- Reduce rating errors through calibration and manage underperformance with a structured improvement plan
- Produce an Appraisal and Probation Toolkit that line managers can apply consistently

Target Audience

- Line managers responsible for appraising team members and confirming new hires
- HR managers and business partners responsible for appraisal policy and moderation
- Department heads chairing calibration and talent review meetings
- Performance management leads coordinating the annual appraisal cycle
- Supervisors promoted into management who now own probation and appraisal decisions

Course Outline

Day 1: Appraisal and Probation Foundations

- Performance Management Cycle: Plan, Monitor, Review and Reward
- Appraisal Policy Audit: Rating Scale, Frequency and Decision Links
- Probation Period Purpose and ILO Convention No. 158 Qualifying Period Provisions
- Job Description to Performance Standard Conversion Worksheet
- Current Appraisal Practice Diagnostic Using Rating Distribution Data

Day 2: Appraisal Methods and Models

- SMART Objectives and Key Result Area Writing
- Behaviourally Anchored Rating Scale BARS Design
- 360-Degree Feedback Instrument Design and Rater Selection
- Competence Assessment Aligned to ISO 10015 Guidelines
- Absolute Rating, Forced Distribution and Continuous Check-In Models Compared

Day 3: Running Probation and Appraisal Reviews

- 30-60-90 Day Probation Review Plan and Checkpoint Forms
- Performance Evidence Log and Critical Incident Recording
- SBI Feedback Model for Appraisal Conversations
- GROW Coaching Model for Individual Development Plans
- Probation Confirmation, Extension and Termination Decision Record

Day 4: Rating Risk and Underperformance

- Rater Error Diagnosis: Halo, Leniency, Central Tendency and Recency Effects
- Calibration Session Facilitation and Rating Moderation
- Performance Improvement Plan PIP Design and Monitoring
- Appraisal Rating and Probation Decision Appeal Procedure
- Performance-Potential Nine-Box Grid for Talent Decisions

Day 5: Role-Play and the Appraisal and Probation Toolkit

- Role-Play: Probation Review with a Borderline New Hire
- Role-Play: Annual Appraisal Conversation with a Rating Disagreement
- Role-Play: Opening a Performance Improvement Plan Meeting
- Appraisal and Probation Toolkit Drafting
- Toolkit Presentation and Peer Feedback

Skills You Will Gain

- Performance Standard Setting
- Objective Writing
- Probation Management
- Performance Feedback
- Development Coaching
- Rating Calibration
- Underperformance Management

Why Attend This Course

- Leave with an Appraisal and Probation Toolkit ready to use in the next probation review or appraisal cycle
- Rehearse the hardest appraisal and probation conversations with feedback before holding them for real
- Make probation and rating decisions that stand up to appeal because the evidence is recorded as you go
- Compare appraisal practice with managers from different sectors, functions and organisation sizes

Conclusion

An appraisal system is judged by the quality of each rating and each conversation, not by the form it uses. This course moves from appraisal policy and the purpose of probation, through objective setting, rating scales and feedback models, to the rating errors, appeals and underperformance cases that test any system. Role-plays on the final day rehearse the conversations managers find hardest and produce an Appraisal and Probation Toolkit, giving participants a consistent and evidence-based way to confirm, develop and rate their people.