



**CAPRICORN**  
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**Other resources in step 7d:**

- Performance appraisal procedure

## Staff performance appraisals

There is a common belief in the medium to small automotive workshop world that fancy management systems are only for the big end of town. How difficult can it be to make sure that one or two or half a dozen technicians are pulling their weight and that everything is being done efficiently.

This belief will only damage an otherwise good business. Far too many workshop owners and staff see staff appraisals as a daunting and time consuming task.

The fact is that small workshops rely on the performance of their staff just as much as big business. Staff performance appraisals are an essential ingredient that will help deliver a high performing and happy workplace.

Once an effective appraisal system is in place it can:

- help assess staff against their goals and objectives
- give you opportunities to provide constructive feedback and to praise staff for their good work
- help address workplace problems
- uncover apparent weaknesses
- identify training needs
- identify better ways to carry out tasks
- provide a means of getting feedback on management from the staff
- allow the business to set goals and objectives for all employees

TaT Biz has prepared a Performance Appraisal Procedure to help Capricorn members implement a quality appraisal, and this can be found at [www.tatbiz.net.au/capricorn](http://www.tatbiz.net.au/capricorn)

The procedure comprises three key parts. The first is the pre-appraisal form, which is completed by the staff member being reviewed. They have seven days to complete the form.

The second part is what we call the 360 degree form which gives the employee the opportunity to appraise management or their immediate superiors. The form is provided at the same time as the pre-appraisal form and both are completed in seven days.

The third part is the appraisal meeting itself, which should be conducted at an agreed time. At this meeting, the forms are reviewed and a final appraisal form is completed and signed off by both parties, so each knows the other's expectations.

It must be made clear that everything in the appraisal process is confidential between both parties and nothing will be shared with other staff.

Once this is understood and accepted, staff need to be assured that they can be honest in their appraisals of themselves and superiors and they should feel comfortable that they can put down what comes to mind, rather than 'what the boss wants to hear'.

The principle behind this insistence on honesty is that if management don't know about it, they certainly can't improve it.

Holding onto great staff is only going to get harder. An effective appraisal system will provide some assurances that the business is doing as much as it can to keep everyone happy and efficient.

Using the templates will make the process much easier than you think. The success of your business depends on it.

The place to start is [www.tatbiz.net.au/capricorn](http://www.tatbiz.net.au/capricorn)

*Just go for it!*