



CMG Training

The Irish Institute of Professional Education ©

Performance Reviews, Poor Performance & Appraisals Training

Fredericka Sheppard

Managing Director

Voltedge Management

21st September 2026

Performance Management – managing people tool-kit

- ✓ Run fair, objective, motivating performance reviews
- ✓ Set clear SMART goals aligned to business priorities
- ✓ Use data and judgement together in decision-making
- ✓ Address underperformance confidently and legally
- ✓ Handle difficult conversations professionally
- ✓ Create development plans that grow capability
- ✓ Document performance discussions effectively
- ✓ Build a high-performance culture through regular feedback
- ✓ Workplace situations case studies



Fredericka Sheppard, Managing Director; Voltedge Management



A Chartered Fellow of the CIPD and a Certified Management Consultant (CMC), with over three decades of Senior HR Leadership experience across multinationals, start-ups, and indigenous Irish companies in the tech, ICT, and financial services sectors.

A graduate of UL and NCI, and co-founded Voltedge Management, in 2011, a consultancy practice delivering strategic HR consultancy and advisory to clients across Ireland, the UK, and internationally.

My expertise spans change management, governance, organisational design, and people and talent strategy, with a strong focus on supporting C-suite leaders and HR teams. An Adjunct Lecturer and Mentor with Trinity College, and an associate lecturer with the IMI, covering topics such as Leadership, Talent Development and HR.

Worked with management teams across a range of sectors, supporting their development and increased awareness of workplace diversity and intergenerational dynamics.

Currently on the Board of IPMO, chair of the Workplace Mediation Committee, and part of Enterprise Ireland's HR/OD Consultant Panel. Previously served 9 years on the SFA Council, and Board of the Institute of Management Consultants and Advisers.

Passionate about empowering SMEs and advocates for strong leadership and effective people management as key drivers of sustainable growth and global competitiveness

Poll #1

Q1: Do you have an existing performance management process in your organisation ?

YES/NO

Q2: How often do you set goals and feedback meetings with staff ?

- Quarterly
- Every 6 months
- Annually

Q3: Do you discuss salary reviews or bonuses at your performance reviews or annual review meetings with staff

YES/NO

Q4: Do you use company defined AI tools in your business?

YES/NO

Q5: Do you or your staff use AI tools when managing people?

YES/NO



What is Performance Management ?

- **Performance management** is the ongoing process of helping employees understand what is expected of them, supporting them to do their job well, reviewing progress regularly, and addressing any issues early so they can succeed.
- In simple terms, it is about making sure people know their goals, have the right support, receive feedback, and are developing in line with the needs of the team and business.



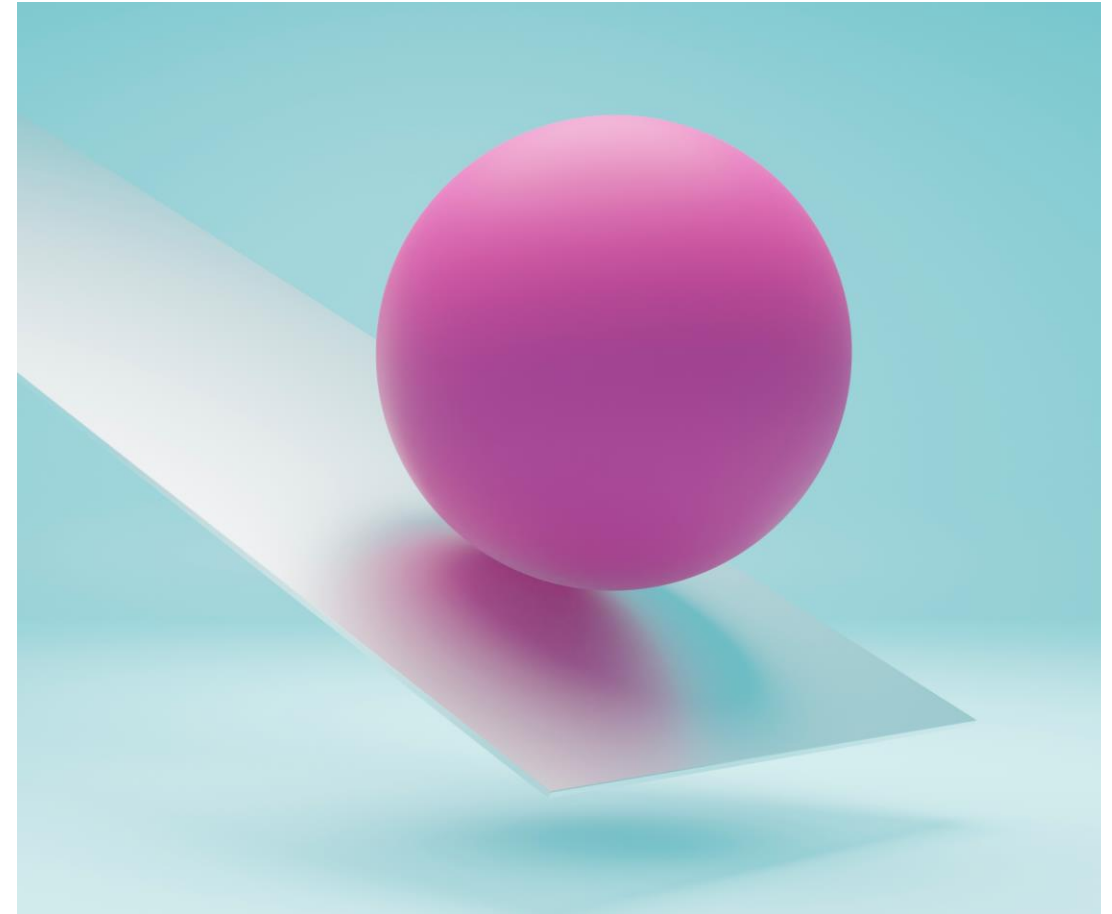
Why it is Important!

Good performance management is important because it:

- **Creates clarity** – employees know what success looks like.
- **Improves results** – clear goals and regular feedback increase productivity.
- **Builds accountability** – everyone understands their responsibilities.
- **Develops people** – identifies strengths, skills gaps, and growth opportunities.
- **Boosts engagement** – people perform better when they feel supported and recognised.
- **Addresses problems early** – underperformance can be managed before it becomes bigger issues.
- **Supports fairness** – decisions on pay, promotion, and development are based on evidence.
- **Strengthens teams** – consistent contribution reduces pressure on others.

A Practical Definition for Managers

Performance management is not just an annual appraisal — it is a continuous cycle of setting expectations, giving feedback, coaching improvement, recognising success, and helping people grow.



Breakout #1 – 10 min

- You will be grouped randomly,
- introduce who you are and share 3 things you'd like to get from our course today!
- Nominate someone to share these back to the wider group.



Strategic View of Performance Management



ENABLING:

- ✓ TWO-WAY CONVERSATIONS
 - ✓ HIGH GROWTH
 - ✓ VISION & STRATEGY
 - ✓ ALIGNMENT
 - ✓ CONSISTENCY
 - ✓ ACCOUNTABILITY
- ✓ CONSCIOUS MANAGEMENT
 - ✓ CULTURE
- ✓ TALENT ACQUISITION
- ✓ TALENT MANAGEMENT
- ✓ RETENTION & DEVELOPMENT

5 stages in Performance Management





Why?

It takes a lot of time
and we are very busy!

TALENT LOOK FOR

— 3 Essentials. One Meaningful Experience. —

1



THAT THEY MATTER

They want to feel seen, valued, and recognized for the unique contributions they bring.

2



THAT THEY KNOW THEIR PURPOSE

They want clarity on how their work creates impact and moves them—and the organization—forward.

3



THAT THEIR EMPLOYER CARES AND IS INTERESTED ENOUGH TO INVEST IN THEM

They want a partner in their growth—someone who believes in their potential and provides opportunities to develop.



— WHEN THESE THREE ARE TRUE,
TALENT STAYS, GROWS, AND THRIVES. —



Why spend time doing it?



Talent Management: Focused 1:1 time to discuss the employee and their role



Recognise and acknowledge contribution



Identifies areas for growth, development and opportunity



Alignment –& systemic thinking



Motivation and encouragement to achieve the best of their ability

When is it
effective...



It clarifies and raises standards of performance



It is clearly linked to business planning/the business cycle



Investment in the relationship and the person



Develops and sustains high levels of competency among employees



Attracts and retains the best talent

8 Essential elements – Performance Management Programme

Overall company goals for
the business
Clear Strategy linked to
CULTURE and VALUES

Structured and
EASY TO USE process
Documents, Forms, Policy

Managers trained to set
SMART goals and give
MEANINGFUL feedback

ALIGNMENT of
departmental goals to
company goals

ALIGNMENT of individual
goals to departmental goals

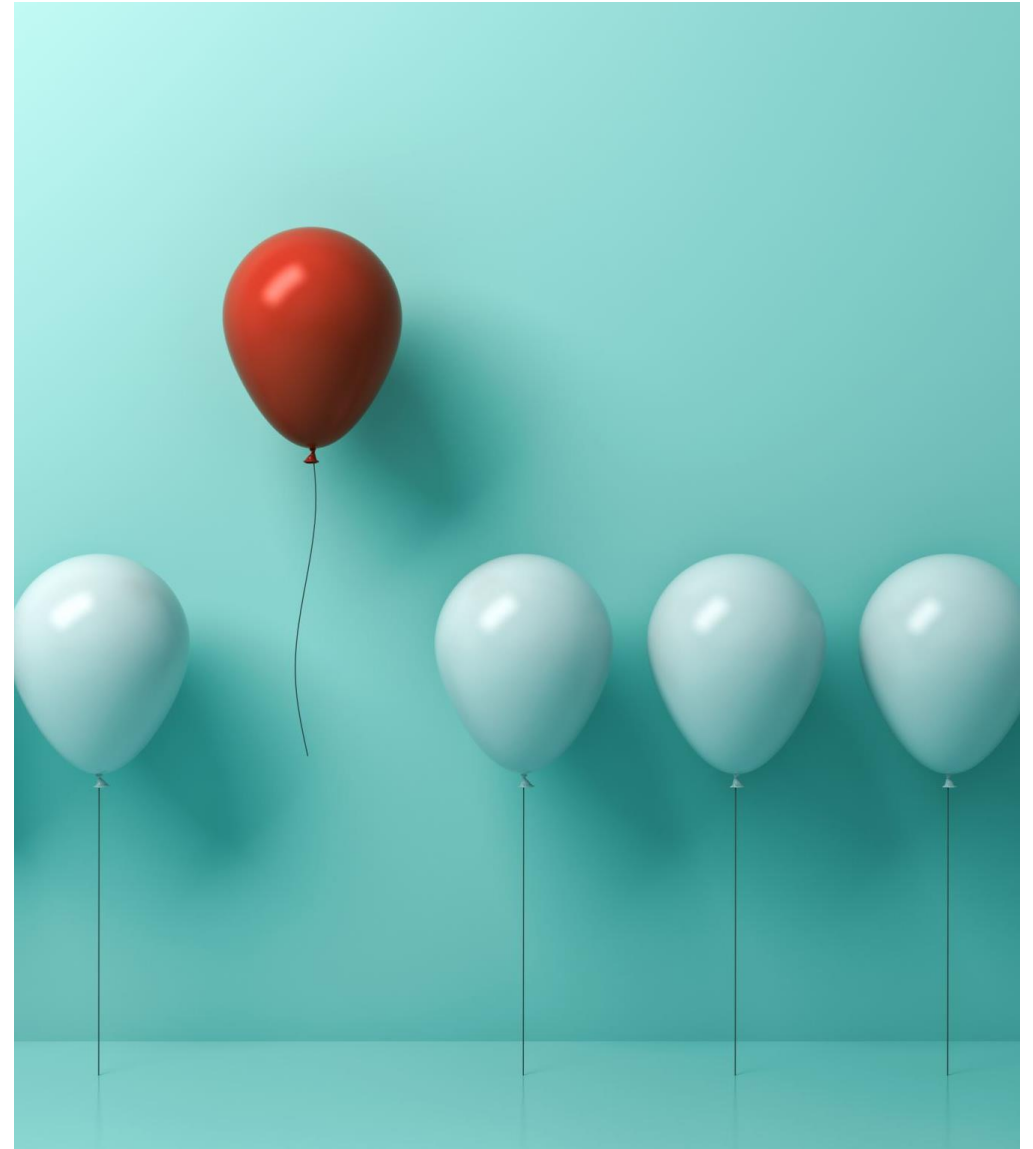
REGULAR PIT STOP
conversations on progress
More than just operational
matters

Training and mentoring
support to deliver
DESIRED OUTCOMES to the
required standard

Recalibrate goals if
necessary to ensure they
remain relevant and aligned
to the **BUSINESS NEEDS**

Why Performance Management fails!

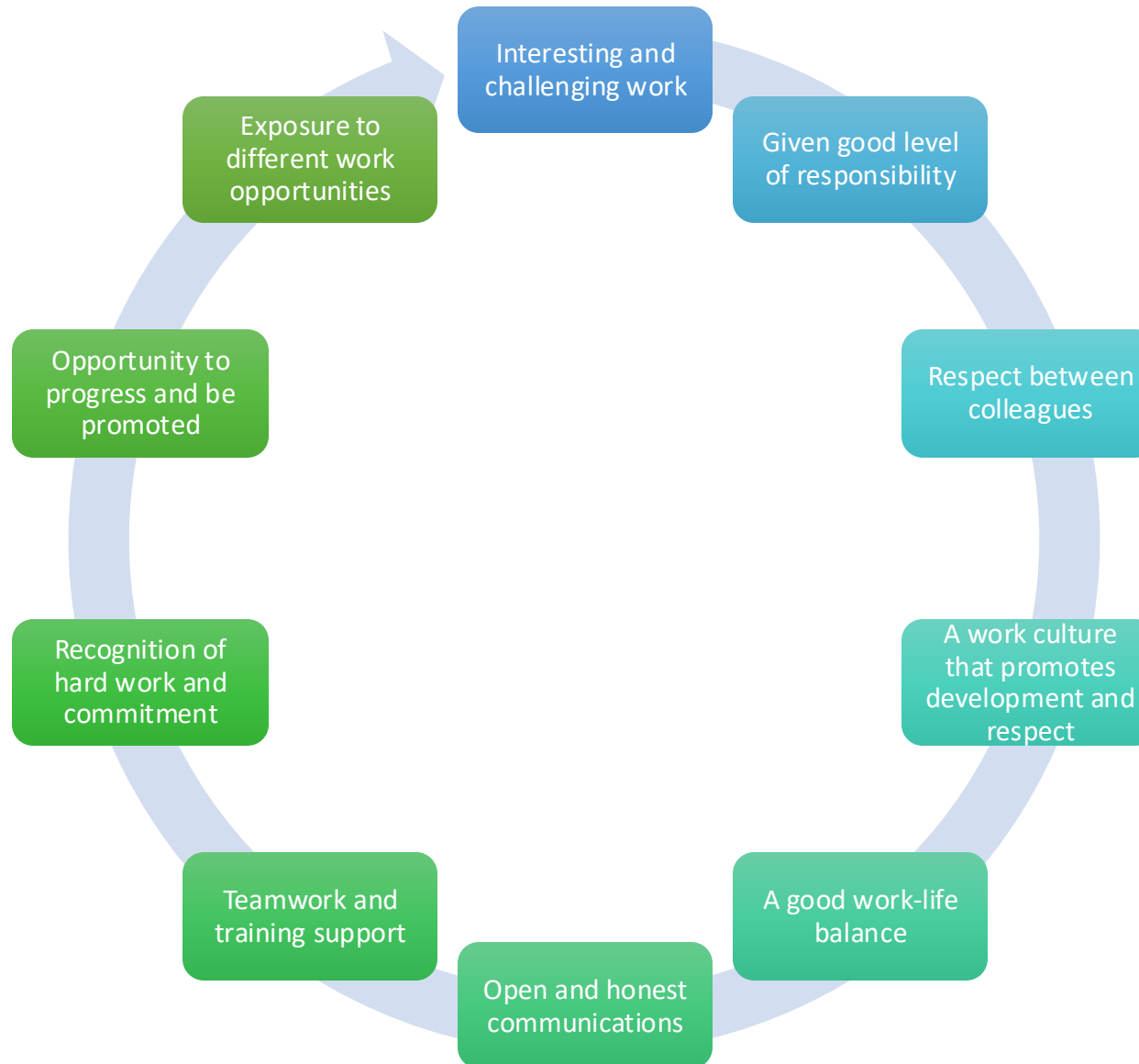
- ❖ Lack of a strategic vision - alignment to purpose
- ❖ Lack of planning and scheduling
- ❖ A administrative process
- ❖ Poor Communication
- ❖ Poor role clarity
- ❖ Not addressing poor culture or behaviour
- ❖ Feeling under valued
- ❖ No follow up with development opportunities
- ❖ Low level of commitment and lack of skills





Setting goals for performance and alignment

What employees typically want from work



Performance Management cycle - start with the basics





Goal Setting



What SMART means

- **SPECIFIC:**
 - Defined by asking questions such as what? How? To whom?
- **MEASURABLE:**
 - How can you measure the goal? How will you know it has been reached? The key to setting good goals is to choose a measure that captures the exact outcome you expect to achieve
- **ACHIEVABLE:**
 - Goals should be achievable yet provides the stretch that inspires people to aim higher.
- **RELEVANT:**
 - Objectives should relate directly to the individual, the department goals and be in alignment with overall goals. The goal must be within the remit of the individual.
- **TIMEBOUND:**
 - When should it be achieved by?



**WHAT
DID YOU SEE
FIRST?**

- 1. TREE**
- 2. GORILLA**
- 3. LION**
- 4. FISH**

Breakout #2 – 15 min

In your groups, I want you to pick a job or role that is familiar to all of you eg: Office Manager or Finance Executive, and together set out 4 x SMART goals relevant to the role you chose.

Consider the following:

They need to know what is expected of them

How you would like them to engage and behave

What will success look like for them

What are some of the time lines to be considered



Welcome back - Feedback from each group

- ✓ What did you feel worked
- ✓ What was challenging
- ✓ How successful would this goal setting be in a live situation



Data-Driven Performance Management (AI & Analytics)

- Predictive trends in turnover / performance
- Skills gap analysis
- Workforce dashboards
- Using AI responsibly
- Limits of AI / ethics / privacy
- Human oversight in decisions
- Important message:

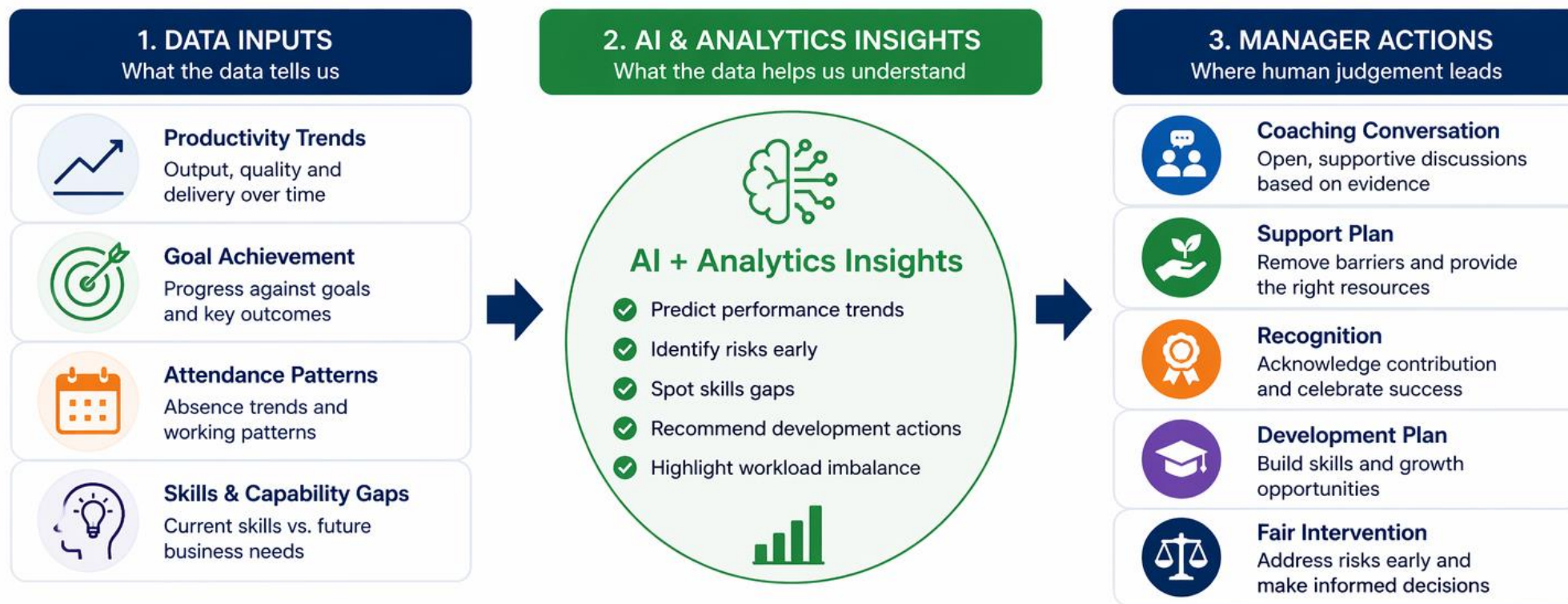
AI informs decisions — it should not replace management judgement.



Data-Driven Performance Management

Using AI & Analytics to Support Better People Decisions

We combine data insights with human judgement to drive fairer decisions, support employee growth and improve business outcomes.



More Objective

Decisions based on facts, not just feelings or recency.



More Proactive

Identify issues and opportunities earlier to take action.



Better Outcomes

Stronger performance, engaged people and healthier teams.



AI informs decisions. Managers lead decisions.



Use data ethically, fairly and in line with GDPR obligations.

Welcome back - Feedback from each group

- ✓ What did you feel worked
- ✓ What was challenging
- ✓ How successful would this goal setting be in a live situation



Performance Planning



Performance planning and objective setting is carried out at the beginning of each year following the setting of the organisational objectives and entails goal setting at department and individual level.



A goal can be defined as an observable or measurable organisational outcome to be achieved within a specified time limit. Setting objectives is invaluable for steering and enhancing performance at an organisational level, and we believe it to be effective and valuable in steering and enhancing performance at an individual employee level.



Each department has specific objectives to assist the company achieve its business objectives.



Both employee and manager should discuss possible objectives and make suggestions on how to achieve these.



Objectives can be reset, redefined, amended or added to reflect differing business requirements and priorities and as necessary throughout the year.

Preparing for the goal setting meeting



Complete your own goal setting meeting with your Manager and have full clarity of Departmental Goals.



Explain the goal setting process and departmental goals to each direct report



Request that each employee thinks about their draft goals in advance of conducting the meeting.



Review each of the employee's draft goals and ask yourself are they SMART?



Ask yourself are there any goals missing?



Think about how you will support the person to achieve their goals



Schedule the goal setting meeting. Allow sufficient time for good engagement



Prepare your comments, questions and mindset in advance



Development: What supports and training will be needed to achieve these goals

Managers checklist



Are the objectives balanced?



Do they fit well with my own objectives as Manager?



Do they fit well with other team member's objectives?



Are there too many/too few?



Is there a good spread / span of activity / focus?



Is there a good spread of standard/operational / stretch objectives, appropriate to the individual?

At the goal setting meeting



Explain the initiatives and priorities of the Department, ensuring clarity



Encourage two-way conversation, questions and clarity



Refer to the employee's draft goals. discuss each goals in turn to ensure SMART



Complete the SMART Checklist



Agree revisions needed to goals/priorities/developmental areas



Discuss supports and development activity required to assist the individual



Set date for final goals to be submitted and next meeting



Feedback - allow time for the employee to feedback



Motivate – close the meeting on a positive note

For the employee: when thinking about goals and what is important

- The part I will play in achieving those goals – the specific focus I will take during this period.
- How I will do it – what I will do, the projects I engage with and so on
- What I need to succeed
- What might change that will require me to readjust this plan?

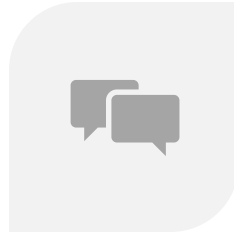




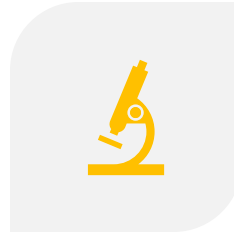
Critical success factors



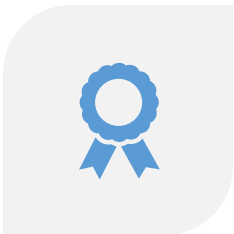
**HAVING CLEAR ALIGNED
GOALS AND OBJECTIVES.**



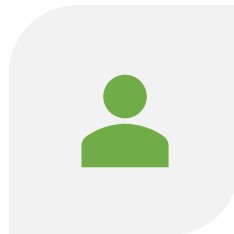
**REGULAR ONGOING
REVIEWS.**



**A CLIMATE OF
DEVELOPMENT.**



**RECOGNITION OF HIGH
PERFORMANCE.**



**INDIVIDUAL OWNERSHIP
AND RESPONSIBILITY FOR
PERFORMANCE.**



**ALIGNMENT TO
COMPANY VALUES AND
BEHAVIORS**



Investing in people and not just the processes !



CFO asks CEO: " What happens if we invest in developing our people and then they leave us?"
CEO: " What happens if we don't and they stay?"

Ukjent

"Train people well enough so they can leave. Treat them well enough so they don't want to."

Sir Richard Branson

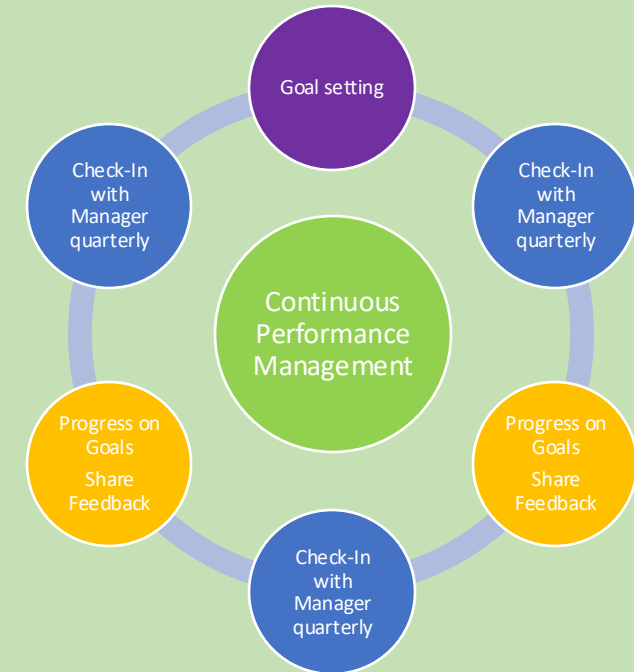


Break out #3 – 10 min

Go back to the SMART goals you set earlier

- What would you do differently this time round
- How can you influence the successful outcome of your employee's performance

Share any changes you have made to your goals



Remain focused on the priorities of Performance Management within the business.

Performance and talent management requires us to pause and reflect, so that we prioritise the time for conversations around our people development.

These **conversations are formal and informal**, between the manager and employee, for example in performance reviews or appraisals, as well regular and ad hoc conversations, which in turn feed into ratings for developmental and recognition decisions.

As part of pausing and reflecting, employees can also talk to their managers about the **development, support** and resources they need to do their jobs really well.



Remain focused on the priorities of Performance Management within the business.

Performance and talent management processes are designed to:

1. Support every employee to have **clarity** on what they need to deliver, and how their work and the way they do it contributes to the company's success.
2. Ensure we **fairly measure** individual performance through individual objectives agreed in a participative way. This will deliver departmental and business objectives.
3. Aim to **motivate** and drive individual performance and development through self-awareness and personal growth which in turn drives business performance.
4. Make every effort to **recognise and reward** success – through incentives associated with the achievement of individual and company objectives.



Check-in meetings

In the majority of cases, the Check-in Meetings and Review Meetings are positive meetings and an important opportunity for the manager to instigate positive engagement and feedback.

The meetings should cover the following:

- Review positive progress against objectives.
- Discuss and resolve any problems with regard to performance.
- Review compatibility within the company.
- Discuss training and support needs.





Preparation and Planning

Preparation is key to ensuring that meetings are as effective as possible.

- ✓ Fix a mutually convenient time, which gives plenty of time to the manager and employee an opportunity to prepare.
- ✓ Read and review role requirements, objectives set, notes of any previous meetings and the HR file.
- ✓ Review results achieved against objectives set and overall performance.
- ✓ Consult with peers in their own department and in other functions who works closely with the employee, if relevant.
- ✓ Set out the room to allow for an informal and relaxed meeting and ensure there are no interruptions.
- ✓ If virtual, check the technology works and give some time to develop some rapport at the outset



How to make your meeting successful:

1. State the objectives of the meeting.
2. Explain the procedures involved, i.e. what happens next
3. Explain how you wish to conduct the meeting; get them to assess their performance first.
4. Use open-ended questions to get a discussion going.
5. Listen actively to what is being said.
6. Probe if details are missed or if they speak in generalities.
7. Summarise the main points of the discussion from time to time.
8. Make your assessment known and discuss any points arising from it.
9. Praise for work well done; in a constructive way, point out areas for improvement and the reasons why.
10. Ask for feedback on how you might support them in making these improvements.
11. Discuss how these areas can be improved and agree an action plan with clear indication of who is responsible for each area of action, including training and support.
12. Finalise the discussion by a quick overall review of the meeting and end the interview on a POSITIVE note.



Sample questions to ask!



1. What particular aspects of your work interest you most?
2. What particular parts interest you least?
3. How effective do you think you have been in your main tasks/responsibilities?
4. What tasks do you believe you have performed particularly well and why?
5. Which tasks could have been performed more effectively and how?
6. What's preventing you from being more effective in these areas?
7. What areas, if any, are unclear in your role?
8. What extra help or guidance do you feel you need to be successful?
9. What training programme could assist this development?
10. Are there any specific areas that you are concerned about in your role?



@PeacefulMindPeacefulLife

You don't inspire your
teammates by showing
them how amazing you are.

You inspire them by
showing them how amazing
they are.

—ROBYN BENINCASA





“

It's their future.
Not your agenda.

Tamra Chandler



TRUE
HAPPINESS
AT WORK
COMES FROM
FEELING VALUED,
NOT JUST
EMPLOYED.

@chrisraineyhr

“Treat employees like
they make a
difference,

and they will”

– *Jim Goodnight*



What makes Feedback Great Feedback?

- Timeliness
- Specific – describe specific behaviour – not personality
- Balanced – start with the positives
- Regular & supportive
- Future focused
- Consistent & objective
- Coaching style – Listening and seek to understand
- Recognising different personality styles & motivators

Breakout #4: 10 min

Reflection point:

Think about a manager who gave you very effective feedback.

What impact did it have on you?



Giving meaningful Feedback

- Increased understanding of the importance of timely feedback
- Increased understanding of the different types of feedback
- Increased knowledge of how to give and receive feedback



Why bother with Feedback?

- Recognition - Employees feel valued and 'seen'
- Builds a high performing team
- Employee engagement
- Developing a growth mindset culture
- Developing personal responsibility and ownership
- Allows team members to move between the 'Performance Zone' and 'Learning Zone'
- Maximising everyone's potential to be their best self



Types of Feedback

General feedback: e.g. *'You are doing a good job.'* - too vague

Negative feedback: Necessary but needs to be very specific in it's application

e.g. *'You did not achieve your sales results in that particular product category – here are the figures'*

✓ Always add on the action – *'Let's look at what can we do to resolve this and improve your performance.'*



Types of Feedback

Constructive feedback: Specific feedback on details that can be helpful

- e.g. *'You came across as very negative at the team meeting – lets discuss this and see what the issue is'*

rather than

- *'You are always being negative – it's very difficult for others to deal with'.*
A coaching conversation

Positive feedback: Prompt positive feedback, this can be informal (in passing conversation), formally at a meeting or a performance review, or by email.

Positive feedback is most beneficial when it is face-to-face or in a meeting environment where the employee is then recognised by their manager and others.



Case studies

Group Exercise

- Look at the facts?
- What are the risks?
- What should manager do now?
- What should be documented?
- What longer-term action is needed?

Key Considerations:

- 😊 Fair procedure & Consistency
- 😊 Equality concerns
- 😊 Reasonable accommodation
- 😊 Clear documentation
- 😊 Informal resolution first where appropriate
- 😊 Escalation to HR when needed



Performance Improvement Plan Guidelines

- The Performance Improvement Plan (PIP) is designed to help an employee to improve his or her performance.
- The purpose of the activities outlined is to help the employee to attain the desired level of performance by a specified timeframe,
- The PIP may be used any time where an employee performance or conducts fails to meet the Manager's expectation.
- The Performance Plan comprises 2 parts: (Part A: Performance Improvement Plan) and (Part B: Performance Improvement Plan Result Evaluation).
- Improvement Targets should be about 4. These should be specific, achievable and measurable, including a timeframe for achievement of these targets.

Review the following items when developing a PIP

- ✓ State specific performance to be improved.
- ✓ State the level of work performance expectation and that it must be performed on a **consistent** basis.
- ✓ Identify and specify the support and resources the Manager will provide to assist the employee.
- ✓ Communicate the plan for providing feedback to the employee. Specify the meeting times and the measurements you will consider in evaluating progress.
- ✓ Specify possible consequences if performance standards are not met.

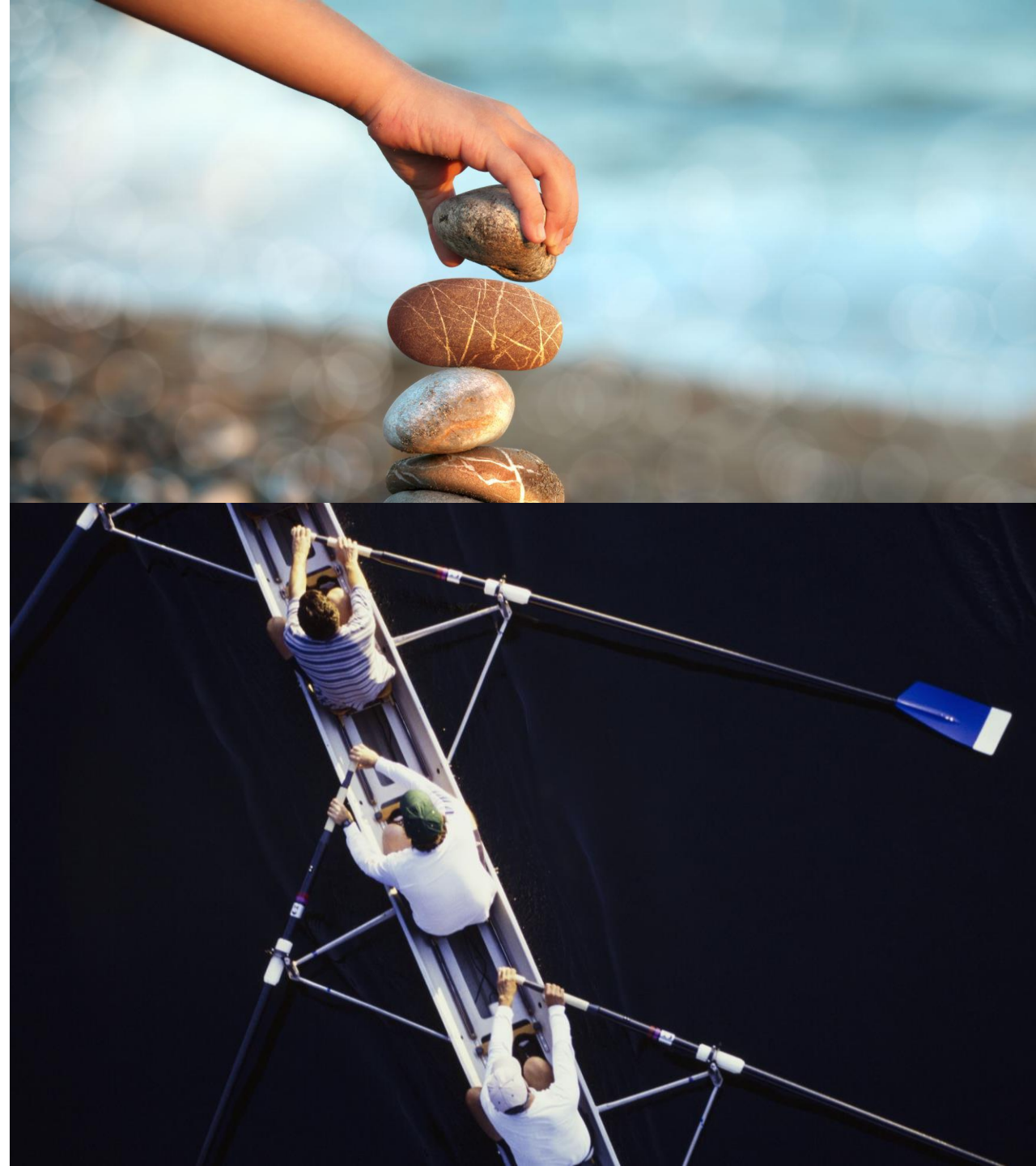
CULTURE & VALUES

Culture defines your way of behaving within your organisation.

- Shared beliefs,
- Values.

Values are established by leaders and then communicated and reinforced through various methods

- Ultimately shaping employee perceptions,
- Behaviours,
- Understanding.



KPI= ~~Key Performance Indicator~~

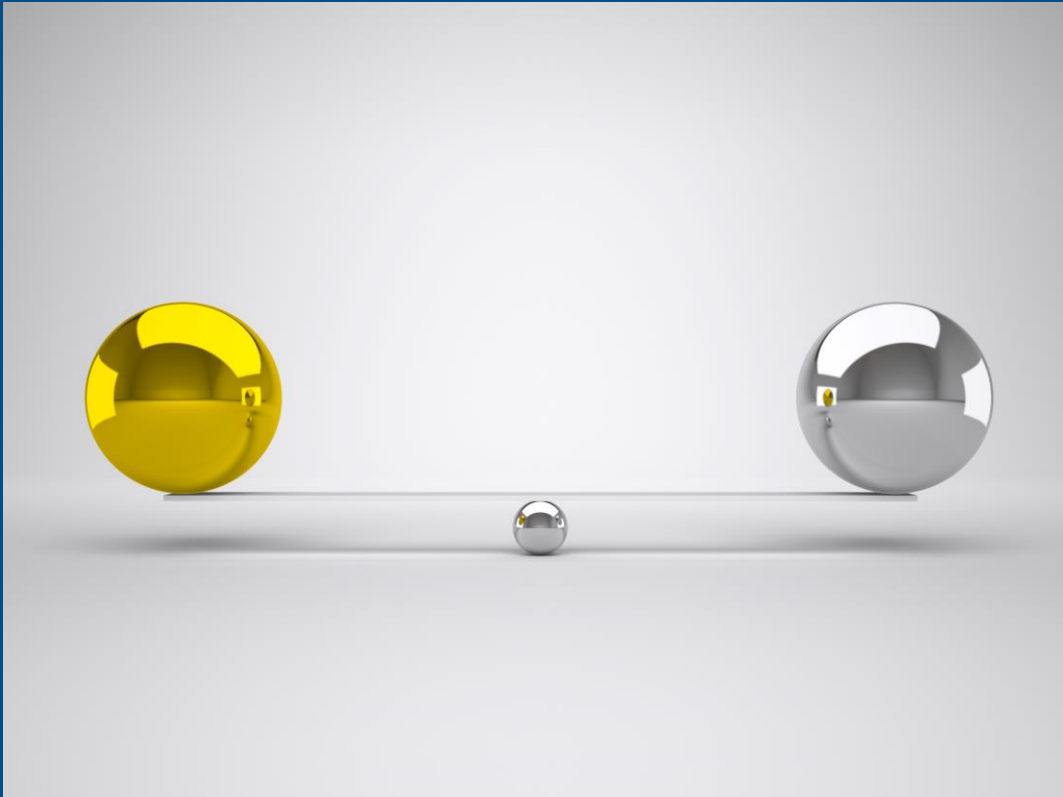
KPI

Keep people interested
Keep people informed
Keep People Involved
Keep people inspired

Original post from ©
Robertson Hunter STEWART



Connection between performance and reward



Reward and Recognition Programme



Salary Review



Bonus Plans



Promotion process



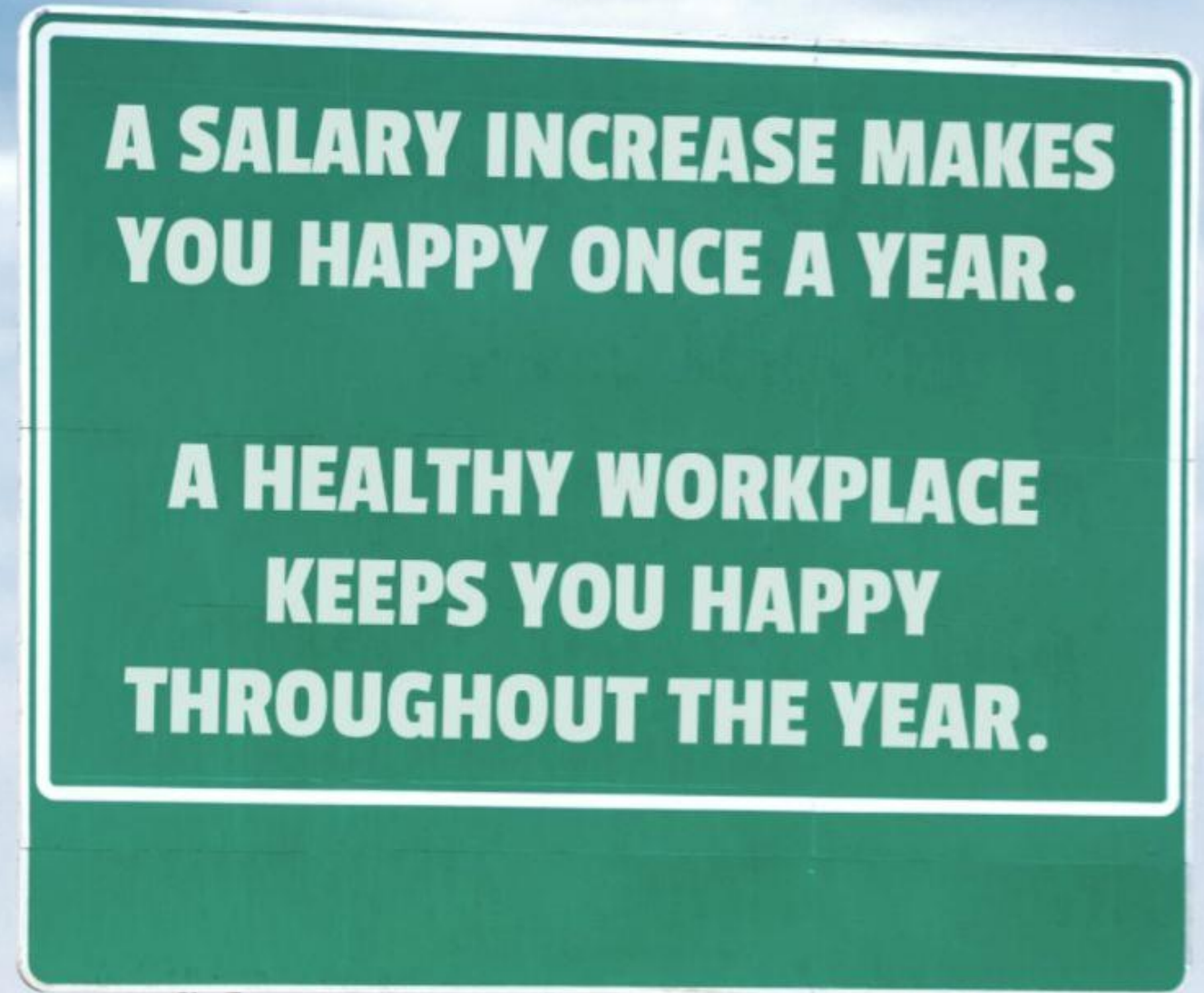
Behaviors & Values

Pay is a simple exchange of money for effort.

- Pay is not a reward. Pay is not appreciation. Pay is not praise. Pay is not gratitude.
- Higher pay can help offset higher expectations, but only to a point. That's when gratitude kicks in.
- Pay Transparency legislation - 2026

Gratitude isn't just an occasional, "Thank you," or a few words of praise, though.

- ✓ Gratitude is also providing developmental opportunities.
- ✓ Facilitating new connections.
- ✓ Teaching new skills. Mentoring, motivating, and providing a sense of purpose that turns work into something much more meaningful.



Main Takeaways

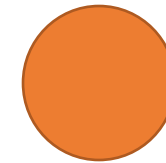
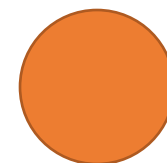
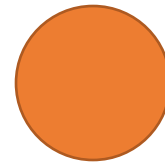
- ✓ Have a clear and defined process
- ✓ Align people goals to the business goals
- ✓ Commence at onboarding and probation period
- ✓ Regular check-ins – NO SURPRISES
- ✓ Planning, documentation, follow up's
- ✓ Fair and reasonable - ALWAYS!
- ✓ Smart goals and meaningful feedback
- ✓ Provide support and training
- ✓ Gather information and make informed decisions - Let AI inform & Managers decide
- ✓ Reward the right behaviours as well as performance
- ✓ Collaborate for success
- ✓ Communication, Communication & Communication





***Together, holding the space
for top performance and
engagement at work!***

Thank you!





Over to you!!



CMG Training

The Irish Institute of Professional Education ©