Setting the Stage for a Successful Performance Conversation  
Employee Session
Use the chat feature to participate in activities.

Click to submit a question.

Your text can be seen by panelists and other attendees.
What are your first thoughts when you hear it’s performance appraisal time?
What do you wish it was like?
By the end of today’s session, you will be able to:

- Understand the value and purpose of self-assessments
- Use best practices and resources for self-assessment
- Complete the self-assessment in Carolina Talent
- Navigate resources and support to prepare for your appraisal
Self-assessments and appraisals help you grow.
PERFORMANCE MANAGEMENT PROCESS

**Self-Assessment**
- Starts March 15 - 31

**Manager Assessment**
- Starts April 1 - 30

**Goal-Setting**
- Starts April 1 - May 20

By June 3
Best practices for your self-assessment

1. Think about performance all year long
2. Reflect on your year fairly
3. Write your narrative
4. Be accountable and show ownership
5. Be authentic and transparent
6. Share examples
Think about performance all year long

- Visit Carolina Talent
- Reflect on your Role
- Catalog your experiences
### Best practices for your self-assessment

1. Think about performance all year long
2. Reflect on your year fairly
3. Write your narrative
4. Be accountable and show ownership
5. Be authentic and transparent
6. Share examples
Reflect on your year fairly

- Identify strengths and where they show up
- Acknowledge areas of improvement
Best practices for your self-assessment

1. Think about performance all year long
2. Reflect on your year fairly
3. Write your narrative
4. Be accountable and show ownership
5. Be authentic and transparent
6. Share examples
Write your narrative

• Follow the questions in Carolina Talent to build your assessment
• Illustrate achievements with specific examples
• Focus on outcomes and results
• Maintain a professional tone
Best practices for your self-assessment

1. Think about performance all year long
2. Reflect on your year fairly
3. Write your narrative
4. Be accountable and show ownership
5. Be authentic and transparent
6. Share examples
Be accountable and show ownership

• Take ownership for successes and setbacks
• Suggest ways to enhance performance for next year
Best practices for your self-assessment

1. Think about performance all year long
2. Reflect on your year fairly
3. Write your narrative
4. Be accountable and show ownership
5. Be authentic and transparent
6. Share examples
5 Be authentic and transparent

- Be honest and upfront when speaking with your supervisor
Best practices for your self-assessment

1. Think about performance all year long
2. Reflect on your year fairly
3. Write your narrative
4. Be accountable and show ownership
5. Be authentic and transparent
6. Share examples
Share examples

• Support your performance with detailed examples
• Prioritize accomplishments that highlight your contribution
Use the STAR method

**Situation**: Briefly describe the context

**Task**: Clarify your role

**Action**: Detail specific actions you took

**Result**: Describe the positive outcomes and the broader impact
I feel that I made positive contributions toward improving our department's response time without compromising the quality of support we provide.

As just a few examples, I initiated a comprehensive review of our current processes and identified bottlenecks. I also implemented a new ticketing system that allowed us to prioritize queries based on urgency and complexity and organized the team to create specialized response units. Finally, I conducted training sessions to enhance our team's problem-solving skills.

Example: Customer Service Manager

Review this example considering the STAR method
(Situation, Task, Action, Result)
Example: Customer Service Manager

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Review this example considering the STAR method (Situation, Task, Action, Result)

What elements of the STAR method are included?

What may be missing?
Example: Customer Service Manager

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Example: Customer Service Manager

Last year, we heard from several of our customers that they were frustrated with the long response time from our customer service team.

I feel that I made positive contributions toward improving our department’s response time without compromising the quality of support we provide.

As just a few examples, I initiated a comprehensive review of our current processes and identified bottlenecks. I also implemented a new ticketing system that allowed us to prioritize queries based on urgency and complexity and organized the team to create specialized response units. Finally, I conducted training sessions to enhance our team’s problem-solving skills.

Within three months, we reduced the average response time by 40%, and customer satisfaction scores improved from 75% to 92%. Our customers reported that this resulted in significant cost savings. In addition, our team received a commendation from the company for outstanding improvement in customer service.
You have a new performance task in Carolina Talent

noreply@hr.unc.edu

To: Procel, Jessica

8:06 PM

Carolina Talent

Dear Jessica Procel,

This is a notification that you have been assigned a new performance task in Carolina Talent.

Task for: Jessica Procel

Task: SHRA Annual Appraisal 2023-2024

Step: Employee Self-Assessment

Due Date: March 31, 2024

To view the task in Carolina Talent, click here.

If you have questions please contact 919-962-HELP or complete a Help ticket.

Internal Use Only: Performance Task Assigned
Welcome Jessica!

**MY ACTION ITEMS**
- **Due date**: 9/30/2023
- **Action Item**: Preventing Harassment & Discrimination for Non-Supervisors
- **Action Item**: My Learning: Withdrawing from Instructor-Led Training

**PENDING PERFORMANCE DOCUMENT TASKS**
- **Due date**: 3/31/2024
- **Task**: My Appraisal Task

CULTIVATING YOUR CAREER AT UNC
Complete questions to evaluate performance

- Accomplishments
- Goal Alignment
- Unit-specific questions
- Additional considerations
Take time to prepare for your appraisal

- Keep an open mind with a focus on professional growth
- Use active listening and ask clarifying questions
- Take time to reflect after the appraisal
Make sure you understand rating system

Understand goal weight

Goal ratings at Carolina
Start setting goals for next cycle

- Use this appraisal to set goals for next cycle
- Set SMART goals
- Collaborate with your manager and revisit to adapt as needed
Performance Management Self-Assessment

Our performance appraisal process starts with the opportunity to complete a self-assessment and reflect on our accomplishments, strengths, areas for improvement, and overall, our contribution to the University. Self-assessments in the performance process foster a culture of learning and growth, align employee performance with organizational goals, facilitate dialogue and feedback and lay a strong foundation for a productive performance conversation between employees and their managers.
Performance Management Help & How-tos

This page provides an overview of important resources, key dates, tools and learning opportunities for employees and managers during performance season.

Log in to Carolina Talent

Performance Hub  New Webinars  Key Dates  Learning Resources
How-to Quick Links  Office Hours

Carolina Talent Performance Hub
With step-by-step guides, FAQs and additional support to help you complete your tasks in Carolina Talent Performance, this new platform is built to ensure that you can find answers easily and efficiently. The Carolina Talent Performance Hub is designed to provide helpful solutions accessible anytime and a user-friendly experience that facilitates self-service and learning.

Carolina Talent Performance Hub
If you need technical help with Carolina Talent Performance, submit a help request via the Carolina Talent Service Request in the UNC help portal.
Carolina Talent Performance Hub Home

Find how-to articles and troubleshooting guides for Carolina Talent Performance

About the Hub
The Performance Hub provides step-by-step guides, FAQs, and additional support to help you complete your tasks in Carolina Talent Performance. This platform is designed to provide helpful solutions that are accessible anytime and a user-friendly experience that facilitates self-service and learning.

To ensure that you can find answers easily and efficiently, we aim to continuously improve your performance experience by adapting the Carolina Talent Performance Hub based on your feedback. Be sure to visit the hub’s feedback/suggestion page to share your experience.

Browse by Topic:

Getting Started
- Carolina Talent Key Terms
- Navigating Through Carolina Talent Performance
- My Profile/Team
- Employee Snapshot (view goals, previous documents, and more)

Managing Goals (via Goals Menu)
- How to View My Goals/ Team Goals
- How to Create Goals
- How to Copy Previous Goals
- How to Edit, Cancel or Delete Goals
- How to Assign a Goal to Multiple Employees
- How to Approve Pending Goals (Managers)
- How to Export/Download Team Goals
- Development Plans

Completing Performance Task
- How to Add/Remove a Co-Planner to a Task
- Performance Plan Task
- EMRA/MUSCRA Annual Appraisal 1...
- EMRA Probationary Review Task
- EMRA Employee Competency Assessment
- How to Launch Off-Cycle Task
- Delete/Remove Task

Resources
- Frequently Asked Questions (FAQs) ...
- How to Submit a Help Desk Ticket
- Quick Reference Cards (QRC)
- Share Your Feedback or Suggestions

Frequently Asked Questions
How to Submit a Help Desk Ticket
Share Your Feedback or Suggestions
Resources

**Info, Tips & Timelines**
- Self-Assessment webpage
- Help and how-tos webpage

**Carolina Talent How-tos**
- Carolina Talent Performance Hub

**Questions**
- Drop-in office hours
- Your HR Representative

**Learning**
- E-learning and Quick Reference Guides

**Support**
- Technical support: Submit a help ticket
- Program support: Email the Performance Management Team
Share Your Feedback

Please share your thoughts on this session.

Your feedback is important and will be used to improve future offerings.
QUESTIONS?

performance_management@unc.edu