



# Setting the Stage for a Successful Performance Conversation

*Employee Session*



Question and Answer

All questions (1) My questions (1)

**J** jprocel (You) 04:55 PM

When can I submit my self-assessment?

Type your question here...

Send anonymously Cancel Send

Who can see your questions?

01:41

Timer for activities

Webinar Chat

Who can see your messages?

To: Everyone

Your text can be seen by panelists and other attendees

Jessica Procel

Audio Settings

- Chat
- Raise Hand
- Q&A
- Hide Captions

Use the chat feature to participate in activities

Click to submit a question

Leave

**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



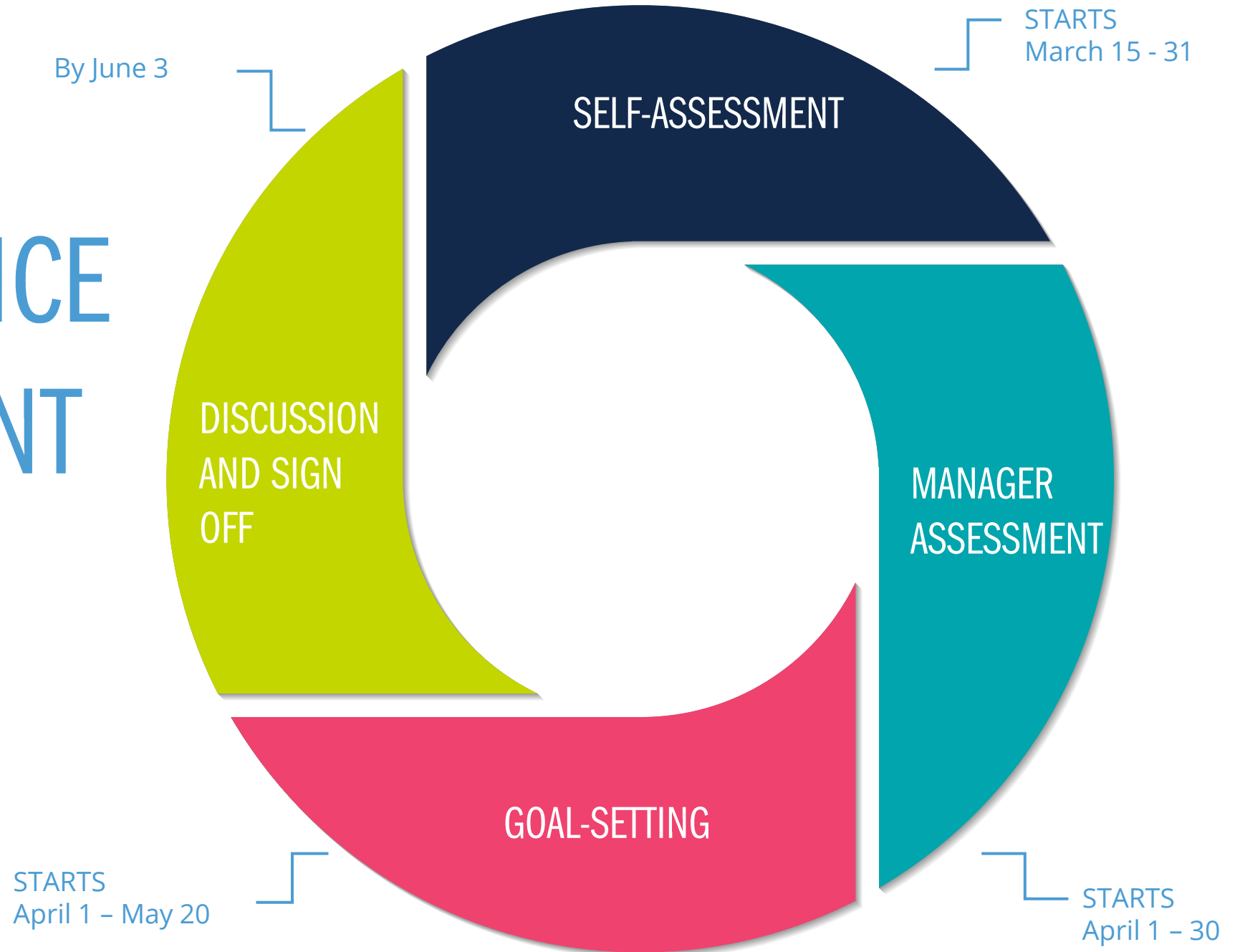
Navigate resources and support to prepare for your appraisal



**Self-assessments and  
appraisals help you grow.**



# PERFORMANCE MANAGEMENT PROCESS





# 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

1

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

# 2

## 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

# 3

## 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

# 4 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

# 6

## 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

## Example: Customer Service Manager

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.

## Review this example considering the STAR method

(Situation, Task, Action, Result)



## Example: Customer Service Manager

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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.

## 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

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.



**Situation**



**Task**



**Actions**



**Result**

## 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.**

**Situation**



**Task**



**Actions**



**Result**



# Carolina Talent Email

You have a new performance task in Carolina Talent

noreply@hr.unc.edu

To: Procel, Jessica



8:06 PM



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

Complete your assessment  
by March 30



# Carolina Talent




**TAKE ME TO**

- [MY PROFILE / TEAM](#)
- [MY ACTIONS](#)
- [SEARCH OPEN JOBS](#)
- [CONNECTCAROLINA](#)
- [UNC HUMAN RESOURCES](#)



**Learning**



**Learning Calendar**



**Performance**

Welcome Jessica!

**My Inbox**

[View transcript](#)  
 (0 approved training selection(s))  
 (Registered for 25 training selection(s))



### MY ACTION ITEMS

Due date	Action Item
9/30/2023	<a href="#">Launch: Preventing Harassment &amp; Discrimination for Non-Supervisors</a>
None	<a href="#">Launch: My Learning: Withdrawing from Instructor-Led Training</a>

### PENDING PERFORMANCE DOCUMENT TASKS

Due date	Tasks
3/31/2024	<b>My Appraisal Task</b>

Maximum of seven tasks displayed. View a complete list on the [Performance Documents](#) page.

# 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



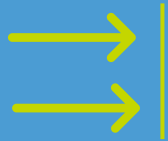
Take time to reflect after the appraisal



# 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.

[About](#)

[Why Complete a Self-Assessment?](#)

[Writing an Effective Self-Assessment](#)

[Self-Assessment in Carolina Talent](#)

[Help & How-tos](#)

[For 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](#).

[Help and how-tos webpage](#)

- Carolina Talent Performance Hub
- All content
- Space settings
- CONTENT
  - Getting Started
    - Carolina Talent Key Terms
    - Navigating Though Carolina Talent ...
    - My Profile/Team
    - Employee Snapshot (view goals, pr...
  - 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 E...
    - How to Approve Pending Goals (M...
    - How to Export/Download Team Go...
    - Development Plans
  - Completing Performance Tasks
    - How to Add/Remove a Co-Planner ...
    - Performance Plan Task
    - EHRA-NF/SHRA Annual Appraisal T...
    - SHRA Probationary Review Task
    - SHRA Employee Competency Asses...
    - 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

### Carolina Talent Performance Hub Home



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

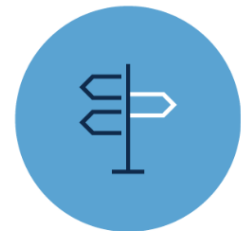
#### About the Hub

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 Though 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
- EHRA-NF/SHRA Annual Appraisal Task
- SHRA Probationary Review Task
- SHRA Employee Competency Assessment (ECA)
- How to Launch Off-Cycle Task
- Delete/Remove Task

# Carolina Talent How-tos

[Carolina Talent Performance Hub](#)

# 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.*

Webinar Evaluation



# QUESTIONS?



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