

**MSS SUCCESS SPACES**

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PERFORMANCE APPRAISAL TRAINING IN THE PHILIPPINES

RATE RIGHT. DEVELOP BETTER.

Practical HR-Based Employee Performance Evaluation, Objective Rating, Calibration, Feedback, Documentation, Development Planning, and Appraisal System Governance

This program is strategically developed for organizations searching for **Performance Appraisal Training in the Philippines, Training on Performance Appraisal in the Philippines, Performance Evaluation Training in the Philippines, Training on Performance Evaluation in the Philippines, Employee Performance Appraisal Training in the Philippines, Training on Employee Performance Appraisal in the Philippines, Employee Performance Evaluation Training in the Philippines, Training on Employee Performance Evaluation in the Philippines, Evaluating Employee Performance Training in the Philippines, Training on Evaluating Employee Performance in the Philippines, Appraising Employee Performance Training in the Philippines, and Training on Appraising Employee Performance in the Philippines.**

This program approaches performance appraisal specifically from the **Human Resources perspective**: how HR designs, governs, standardizes, supports, calibrates, documents, and continuously improves an employee performance appraisal system—and how HR enables managers to evaluate people objectively and consistently.

TRAINING OVERVIEW

Most organizations conduct performance appraisals.

Far fewer conduct them **well**.

Employees may receive ratings every six months or every year, but questions still arise:

“Why did I get this rating?”

“What exactly was I evaluated against?”

“Why did another employee doing similar work receive a higher score?”

“Is this based on actual performance or just my manager's opinion?”

“Why am I hearing about this problem only now?”

“What happens after the appraisal?”

And HR may face a different set of concerns:

- Different managers interpret the same rating scale differently;
- some managers give almost everybody high ratings;
- some managers rarely give high ratings;
- supervisors evaluate based on recent events;
- personality influences ratings;
- managers confuse effort with results;
- employees are evaluated against responsibilities they were never clearly told about;
- Job Descriptions and KPIs are disconnected from appraisal forms;

- competency ratings have no observable behavioral anchors;
- ratings are submitted without sufficient evidence;
- managers avoid difficult appraisal conversations;
- calibration meetings turn into negotiations;
- appraisal comments are vague;
- underperformance is documented only at year-end;
- employees perceive the system as unfair;
- forms are completed mainly for compliance;
- HR receives appraisal documents but cannot meaningfully analyze them;
- performance ratings do not lead to development actions;
- outstanding performers are not differentiated appropriately;
- poor performers repeatedly receive “satisfactory” ratings;
- promotions and salary decisions become difficult to defend; or
- the appraisal process exists, but the organization still cannot confidently answer who is performing well, who needs improvement, and why.

A performance appraisal system should not merely produce a number.

It should create an evidence-based answer to four fundamental questions:

1. **What was the employee expected to achieve and demonstrate?**
2. **What did the employee actually achieve and demonstrate?**
3. **How does actual performance compare with the agreed standard?**
4. **What should happen next because of the result?**

Rate Right. Develop Better.: Performance Appraisal Training in the Philippines equips HR professionals, managers, supervisors, department heads, and other employee evaluators with a structured approach to appraising employee performance objectively, consistently, fairly, and developmentally.

From the **HR perspective**, the program emphasizes that effective employee evaluation requires alignment among:

Job Responsibilities



Performance Expectations



KPIs / Results



Competencies / Behaviors



Evidence



Rating



Calibration



Appraisal Conversation



Development or Improvement Action



Documentation and Follow-Through

The program introduces the **MSS A.P.P.R.A.I.S.E. Performance Appraisal Framework**:

- **A — Align the Appraisal With Roles, Results, Competencies, and Organizational Expectations**
- **P — Prepare Clear Criteria, Rating Standards, Evidence, and the Appraisal Cycle**
- **P — Pinpoint Actual Performance Against Agreed Expectations**
- **R — Rate Objectively and Reduce Rating Bias**
- **A — Align Ratings Through Calibration and Consistency Checks**
- **I — Interview the Employee Through an Effective Appraisal Conversation**
- **S — Set Development, Recognition, and Performance Improvement Actions**
- **E — Establish Documentation, Follow-Through, Analytics, and System Improvement**

Following MSS Corporation's **EnterTRAINment** methodology, this **Training on Performance Appraisal in the Philippines** minimizes lecture-heavy instruction. Participants evaluate sample employee-performance records, distinguish strong from weak appraisal criteria, score performance, identify rating biases, calibrate ratings, practice appraisal conversations, document evidence, and create concrete post-appraisal development or performance-improvement actions.

TRAINING GOAL

To equip HR professionals and employee evaluators with the practical knowledge, evaluation tools, rating disciplines, calibration techniques, feedback skills, documentation practices, and HR governance mechanisms required to conduct objective, consistent, evidence-based, development-oriented, and organizationally useful employee performance appraisals.

TRAINING OBJECTIVES

By the end of the program, participants should be able to:

1. **Explain** the purpose of employee performance appraisal from both management and HR perspectives;
2. **Differentiate** performance appraisal, performance evaluation, performance review, and broader performance management;
3. **Apply** the MSS A.P.P.R.A.I.S.E. Performance Appraisal Framework;
4. **Identify** what should and should not be evaluated in an employee appraisal;
5. **Align** appraisal criteria with Job Descriptions, accountabilities, KPIs, competencies, and organizational expectations;
6. **Differentiate** results-based performance from competency- or behavior-based performance;
7. **Distinguish** performance standards, KPIs, targets, competencies, behaviors, and rating criteria;

8. **Recognize** the importance of communicating expectations before evaluating performance;
9. **Design or review** practical appraisal criteria;
10. **Develop** meaningful rating scales;
11. **Use** behavioral anchors or descriptors where appropriate;
12. **Identify** appropriate sources of performance evidence;
13. **Separate** facts, observations, interpretations, assumptions, and personal opinions;
14. **Compare** actual performance objectively against agreed standards;
15. **Differentiate** activity, effort, accomplishment, result, and impact;
16. **Identify** common performance-rating biases;
17. **Reduce** halo effect, horns effect, recency bias, central tendency, leniency, strictness, similarity bias, and other rating distortions;
18. **Assign** ratings using sufficient evidence and defined criteria;
19. **Write** useful performance comments that explain the basis of ratings;
20. **Conduct** structured rating-calibration discussions;
21. **Identify** inconsistent rating patterns across managers or departments;
22. **Facilitate** or participate in HR-led calibration objectively;
23. **Prepare** for an employee appraisal conversation;
24. **Communicate** positive and unfavorable evaluation results professionally;
25. **Handle** employee disagreement with ratings constructively;
26. **Give** specific, evidence-based, behavior- and results-focused feedback;
27. **Differentiate** recognition, development, coaching, and performance-improvement responses;
28. **Translate** appraisal results into Individual Development Plans where appropriate;
29. **Establish** performance-improvement commitments for significant performance gaps;
30. **Document** appraisal results appropriately;
31. **Explain** HR's responsibility for appraisal-system governance, consistency, record quality, and process integrity;
32. **Use** aggregate appraisal information to identify organizational learning, talent, and performance trends; and
33. **Prepare** a practical Performance Appraisal Improvement Action Plan for their organization.

LEARNING DOMAINS ADDRESSED

Cognitive Domain

Participants strengthen their understanding of performance-appraisal principles, criteria, rating systems, evidence, bias, calibration, feedback, documentation, and HR governance.

Affective Domain

Participants strengthen fairness, objectivity, courage, accountability, consistency, professionalism, respect, developmental orientation, and responsibility for evidence-based people decisions.

Psychomotor and Behavioral Domain

Participants practice evaluating performance records, assigning ratings, writing appraisal comments, calibrating scores, conducting employee appraisal conversations, handling disagreement, and preparing development and improvement actions.

FROM POINT A TO POINT B

Point A: Before the Training

HR and managers may:

- Treat performance appraisal as an annual paperwork requirement;
- use vague evaluation criteria;
- evaluate employees against undocumented expectations;
- rely excessively on memory;
- give ratings based on impression;
- confuse effort with achievement;
- reward busyness rather than results;
- overvalue recent performance;
- allow one positive behavior to influence all ratings;
- allow one negative incident to influence the entire evaluation;
- give everyone average ratings to avoid conflict;
- inflate ratings to keep employees happy;
- rate employees differently despite similar performance;
- write generic comments such as “good employee”;
- give a score without evidence;
- fail to differentiate strong and weak performers;
- wait until appraisal time to raise performance concerns;
- avoid difficult conversations;
- allow appraisal conversations to become arguments;
- conduct calibration informally;
- use Job Descriptions that are disconnected from scorecards;
- fail to turn appraisal results into development plans;
- file completed forms without using organizational performance data; or
- struggle to defend the fairness and consistency of the appraisal process.

Point B: After the Training

Participants should be better able to:

- Understand the purpose of appraisal;
- align criteria with actual roles and results;
- establish clearer evaluation standards;
- use appropriate performance evidence;

- distinguish facts from opinions;
- compare actual performance against defined expectations;
- recognize rating bias;
- justify ratings;
- differentiate performance levels;
- write meaningful evaluation comments;
- conduct calibration objectively;
- identify rating inconsistencies;
- communicate appraisal outcomes professionally;
- handle employee disagreement;
- recognize excellent performance;
- identify development needs;
- establish improvement actions;
- document the appraisal appropriately;
- strengthen HR oversight;
- analyze overall rating patterns; and
- improve organizational confidence in the performance-appraisal system.

ORGANIZATIONAL CHALLENGES ADDRESSED

This **Performance Evaluation Training in the Philippines** may help organizations address:

- Subjective employee evaluations;
- inconsistent ratings among managers;
- inflated ratings;
- excessive average ratings;
- unclear performance criteria;
- employees disputing appraisal results;
- managers unable to justify scores;
- unclear connection between Job Descriptions and appraisals;
- KPIs not reflected in employee evaluation;
- competency ratings based mainly on personality;
- weak performance documentation;
- employees surprised by negative ratings;
- managers avoiding unfavorable feedback;
- poor quality appraisal comments;
- bias affecting ratings;
- ratings that do not differentiate performance;
- calibration meetings without common standards;
- department heads defending employees rather than evaluating evidence;
- performance problems left unaddressed;
- lack of development planning;
- appraisal forms completed only for compliance;

- poor HR analytics from performance data;
- appraisal results that cannot support talent decisions confidently;
- employee perceptions of unfairness;
- HR teams seeking to standardize performance evaluation across the organization; or
- organizations redesigning their employee appraisal system.

WHAT PERFORMANCE APPRAISAL MEANS

Performance Appraisal is a structured evaluation of an employee's actual performance against previously established expectations, criteria, standards, targets, responsibilities, and behavioral requirements for a defined review period.

A useful appraisal should establish:

Expected Performance

versus

Actual Performance

to determine:

Performance Result

and then decide:

Recognition, Development, Coaching, Improvement, or Other Appropriate Action

PERFORMANCE APPRAISAL VERSUS PERFORMANCE MANAGEMENT

These concepts are related but not identical.

Performance Management

Performance Management is the broader and continuous process that may include:

- Goal setting;
- expectation clarification;
- ongoing monitoring;
- coaching;
- feedback;
- performance support;
- employee development;
- corrective action;
- periodic review;
- appraisal.

Performance Appraisal

Performance Appraisal is the structured evaluation or review component of that larger process.

It answers:

How did the employee perform during the defined appraisal period compared with agreed expectations?

Performance appraisal should therefore not be the **first time** an employee discovers how management views their performance.

PERFORMANCE APPRAISAL VERSUS PERFORMANCE EVALUATION

In many organizations, the terms are used interchangeably.

For this training:

Performance Evaluation refers to the act of assessing actual employee performance.

Performance Appraisal refers to the formal organizational process through which that evaluation is documented, rated, discussed, reviewed, and acted upon.

Both are addressed by the program.

THE HR PERSPECTIVE ON PERFORMANCE APPRAISAL

Managers may conduct most individual employee appraisals.

HR should help ensure that the **system itself** works.

HR responsibilities may include:

- Establishing the appraisal policy and cycle;
- designing templates;
- defining rating scales;
- aligning with Job Descriptions and competencies;
- orienting raters;
- establishing deadlines;
- checking completeness;
- facilitating calibration;
- identifying rating inconsistencies;
- ensuring documentation quality;
- supporting managers in difficult appraisal cases;
- maintaining records;
- analyzing organizational rating patterns;
- identifying development needs;
- reviewing the effectiveness of the system.

HR should not merely collect appraisal forms.

HR should protect the **quality and integrity of the appraisal process.**

WHAT SHOULD BE APPRAISED?

A performance-appraisal system may assess some combination of:

1. Results / KPIs

What did the employee accomplish?

Examples:

- Sales revenue;
- gross margin;
- collection efficiency;
- production output;
- on-time delivery;
- customer satisfaction;
- accuracy;
- turnaround time;
- project completion;
- cost reduction.

2. Major Job Accountabilities

How effectively did the employee fulfill core responsibilities?

3. Competencies

What capability did the employee demonstrate?

Examples:

- Communication;
- planning;
- leadership;
- problem-solving;
- customer orientation.

4. Workplace Behaviors or Values

How consistently did the employee demonstrate required organizational behaviors?

Examples:

- Accountability;
- collaboration;
- professionalism;
- integrity.

The appropriate combination depends on the organization's performance-management architecture.

RESULTS VERSUS BEHAVIORS

An employee may:

- Achieve results but demonstrate unacceptable behavior;
- demonstrate excellent attitude but fail to achieve required results;
- meet both;
- fall short on both.

A useful appraisal system makes clear how each dimension affects overall performance.

JOB DESCRIPTION TO PERFORMANCE APPRAISAL ALIGNMENT

A useful chain is:

Strategic Plan



Department Objectives



Job Description / Accountabilities



Employee Performance Scorecard



KPIs / Standards / Competencies



Performance Appraisal

If employees are evaluated against criteria unrelated to their actual accountabilities, the appraisal system loses credibility.

THE MSS A.P.P.R.A.I.S.E. PERFORMANCE APPRAISAL FRAMEWORK

A — ALIGN THE APPRAISAL WITH ROLES, RESULTS, COMPETENCIES, AND ORGANIZATIONAL EXPECTATIONS

A fair appraisal begins before the rating is assigned.

HR and managers need clarity about:

- What the employee's role exists to accomplish;

- major responsibilities;
- expected results;
- performance measures;
- targets;
- competency expectations;
- organizational behaviors.

You cannot fairly evaluate an employee against a standard that was never clearly established.

PERFORMANCE EXPECTATIONS

Expectations should answer:

- What result is required?
- What level of quality is required?
- When is it required?
- How will it be measured?
- What behaviors are expected?
- What evidence will demonstrate achievement?

PERFORMANCE CRITERIA

Criteria should ideally be:

- Relevant;
- job-related;
- sufficiently clear;
- observable or measurable;
- consistently interpretable;
- within reasonable employee influence.

Avoid criteria such as:

“Good attitude”

without explaining what observable behavior constitutes the desired attitude.

A stronger behavioral description might include:

Responds professionally to instructions, raises concerns constructively, and collaborates appropriately with colleagues.

P — PREPARE CLEAR CRITERIA, RATING STANDARDS, EVIDENCE, AND THE APPRAISAL CYCLE

A performance appraisal should not begin on the day the form is due.

Preparation may involve:

- Review period;
- agreed KPIs;
- targets;
- competencies;
- Job Description;
- prior commitments;
- previous development plan;
- feedback records;
- actual results;
- documented achievements;
- performance incidents;
- attendance or compliance information where legitimately relevant;
- customer or stakeholder evidence where applicable.

PERFORMANCE EVIDENCE

Useful evidence may include:

- KPI results;
- productivity records;
- quality results;
- customer feedback;
- project outcomes;
- completion records;
- documented observations;
- agreed milestones;
- work outputs;
- coaching notes;
- written recognition;
- documented performance concerns;
- relevant system-generated information.

The objective is not to build a case against the employee.

The objective is to make the evaluation **evidence-based**.

FACT VERSUS OPINION

Opinion:

“She doesn't care about customers.”

Evidence:

“Three customer complaints during the review period involved failure to provide the promised follow-up within the established service standard.”

Opinion:

“He is unreliable.”

Evidence:

“Four of six monthly reports were submitted after the agreed deadline.”

Evidence supports a more defensible appraisal conversation.

RATING SCALES

Organizations may use:

- 3-point scales;
- 4-point scales;
- 5-point scales;
- percentage scoring;
- descriptive scales;
- competency-proficiency levels;
- combinations.

No rating scale automatically guarantees objectivity.

The most important question is:

Does every rater understand what each rating means?

SAMPLE FIVE-LEVEL RATING LOGIC

An organization may define levels such as:

5 — Exceptional

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Consistently and materially exceeds the established standard and produces significant additional value.

4 — Exceeds Expectations

Frequently performs above the established standard.

3 — Meets Expectations

Consistently achieves the established requirements of the role.

2 — Partially Meets Expectations

Performance is inconsistent or falls below required standards in significant areas.

1 — Does Not Meet Expectations

Performance materially fails to satisfy the established requirements.

The actual organization should define descriptors suited to its system.

BEHAVIORAL ANCHORS

Behavioral anchors help managers distinguish performance levels.

Example competency:

Accountability**High demonstration:**

Takes ownership, follows through on commitments, communicates risks early, and corrects errors without shifting blame.

Expected demonstration:

Completes assigned commitments reliably and accepts responsibility for assigned outcomes.

Below expectation:

Frequently requires repeated follow-up, misses commitments, or shifts responsibility when outcomes are not achieved.

The descriptors create more consistent interpretation.

P — PINPOINT ACTUAL PERFORMANCE AGAINST AGREED EXPECTATIONS

Appraisal requires a comparison.

The question is not:

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“Do I think this is a good employee?”

The question is:

“What was expected, what actually happened, and what does the evidence demonstrate?”

EXPECTATION VERSUS ACTUAL

Example:

KPI

On-Time Delivery Rate

Target

≥ 95%

Actual

91%

Performance Gap

4 percentage points below target.

The rating should follow the organization's approved scoring methodology.

ACTIVITY VERSUS ACCOMPLISHMENT

Activity:

“Called 100 customers.”

Result:

“Generated 20 qualified sales opportunities.”

Activity:

“Conducted 12 coaching sessions.”

Result:

“Four previously underperforming employees achieved target performance.”

Appraisals should not reward activity merely because it creates busyness.

EFFORT VERSUS PERFORMANCE

Employees may work extremely hard.

Effort deserves appropriate recognition.

However, appraisal should still distinguish:

Effort

From

Achievement against agreed performance expectations.

If an employee works hard but repeatedly misses targets because of organizational barriers, management should investigate those barriers rather than arbitrarily changing the performance result.

PERFORMANCE WITHIN EMPLOYEE CONTROL

HR and managers should ask:

- Did the employee have the required resources?
- Did systems function?
- Did another department create the failure?
- Was workload reasonable?
- Were expectations changed midway?
- Was adequate authority provided?

Appraisal should avoid attributing system failures automatically to individual employees.

R — RATE OBJECTIVELY AND REDUCE RATING BIAS

Managers are human.

Performance evaluation therefore carries the risk of bias.

The objective is not to pretend bias can never exist.

It is to develop systems and behaviors that reduce its influence.

COMMON PERFORMANCE APPRAISAL BIASES

Halo Effect

One strong characteristic influences unrelated ratings positively.

“She’s excellent with customers, so she must also be excellent at documentation.”

Horns Effect

One negative characteristic disproportionately affects other ratings.

Recency Bias

Recent performance overshadows the rest of the appraisal period.

Primacy Effect

Early impressions influence the entire evaluation disproportionately.

Leniency Bias

The manager gives ratings that are consistently too high.

Strictness Bias

The manager evaluates employees consistently more harshly than warranted.

Central Tendency

The manager rates nearly everyone in the middle to avoid differentiating performance.

Similarity Bias

The manager unconsciously favors employees with similar styles, backgrounds, or viewpoints.

Contrast Effect

An employee is evaluated relative to another employee rather than against the established standard.

Personal-Liking Bias

The manager confuses interpersonal compatibility with job performance.

REDUCING APPRAISAL BIAS

Useful practices include:

- Defined criteria;
- behavioral anchors;

- measurable results;
- regular documentation;
- multiple evidence sources where appropriate;
- manager training;
- calibration;
- HR review;
- written rationale;
- consistent scoring guidelines.

WRITING APPRAISAL COMMENTS

Weak:

“Very good employee.”

Stronger:

“Exceeded the quarterly sales target in three of four quarters and maintained an average gross margin above the required threshold.”

Weak:

“Needs improvement in accountability.”

Stronger:

“Three priority deliverables were completed after the agreed deadlines without advance escalation. Improvement is required in deadline ownership and proactive communication of delivery risks.”

Useful comments explain **why the rating exists**.

A — ALIGN RATINGS THROUGH CALIBRATION AND CONSISTENCY CHECKS

Even with common rating criteria, managers may interpret standards differently.

Calibration helps reduce this inconsistency.

WHAT PERFORMANCE APPRAISAL CALIBRATION MEANS

Calibration is a structured review of ratings across relevant teams or departments to strengthen consistency and fairness.

It asks:

- Are equivalent performance levels receiving equivalent ratings?

- Are some managers unusually lenient?
- Are some unusually strict?
- Are ratings supported by evidence?
- Are standards interpreted consistently?
- Are exceptional ratings genuinely exceptional?
- Are low ratings appropriately justified?

WHAT CALIBRATION SHOULD NOT BECOME

Calibration should not be:

“We have too many 5s, so somebody has to be downgraded.”

Nor:

“The department head insists this person is high potential, so change the score.”

Calibration is not forced ranking unless the organization's approved system specifically uses such an approach.

The purpose is **consistency and evidence**, not predetermined distribution.

HR'S ROLE IN CALIBRATION

HR may:

- Provide rating distributions;
- identify anomalies;
- facilitate discussion;
- ask for evidence;
- reinforce rating definitions;
- identify inconsistent interpretations;
- document changes and rationales;
- protect process discipline.

HR should facilitate consistency without casually overruling legitimate manager judgment unsupported by a proper review.

RATING DISTRIBUTION ANALYSIS

HR may examine patterns such as:

Manager A

80% rated 5.

Manager B

0% rated 5.

Manager C

90% rated 3.

These patterns do not automatically prove bias.

But they are useful prompts for further examination.

I — INTERVIEW THE EMPLOYEE THROUGH AN EFFECTIVE APPRAISAL CONVERSATION

The appraisal conversation is more than:

“Here's your score. Please sign.”

A useful conversation should help the employee understand:

- What was evaluated;
- what went well;
- what did not meet expectations;
- what evidence supports the assessment;
- what should continue;
- what should improve;
- what happens next.

PREPARING FOR THE APPRAISAL DISCUSSION

Managers should review:

- Performance evidence;
- agreed expectations;
- significant achievements;
- significant gaps;
- examples;
- employee development needs;
- possible next steps.

Avoid conducting an appraisal conversation based entirely on what the manager remembers five minutes before the meeting.

A PRACTICAL APPRAISAL CONVERSATION SEQUENCE

1. Establish the Purpose

Explain that the discussion reviews performance against agreed expectations.

2. Invite Employee Reflection

Ask:

“How would you assess your performance during this period?”

3. Recognize Strengths and Accomplishments

Be specific.

4. Discuss Performance Gaps

Focus on evidence, standards, and impact.

5. Clarify the Rating

Explain how results connect with the rating criteria.

6. Invite Questions and Perspective

Listen without automatically surrendering evidence-based conclusions.

7. Agree on Development or Improvement Actions

Define what happens next.

8. Confirm Commitments and Follow-Through

Document responsibilities and review dates.

HANDLING DISAGREEMENT WITH A RATING

An employee may say:

“I disagree. I deserve a 5.”

The manager should avoid:

- Becoming defensive;
- arguing emotionally;
- changing the rating simply to end the discussion;
- saying, “Because I’m your manager.”

A stronger response is to return to:

- Agreed criteria;
- actual evidence;
- documented results;
- relevant examples;
- rating definitions.

The employee should also have an appropriate mechanism to express their perspective according to organizational policy.

APPRAISAL IS NOT A SURPRISE SESSION

A strong performance-management system should provide feedback throughout the performance period.

Employees should not discover a serious recurring issue for the first time during the annual appraisal.

The appraisal should **summarize and evaluate performance**, not ambush the employee.

S — SET DEVELOPMENT, RECOGNITION, AND PERFORMANCE IMPROVEMENT ACTIONS

The appraisal should answer:

“What happens now?”

Different results require different management actions.

FOR STRONG PERFORMANCE

Possible next steps may include:

- Recognition;
- broader responsibility;
- stretch assignments;
- development opportunities;
- succession consideration;
- career discussions;
- mentoring responsibilities.

Appraisal should not automatically promise promotion or salary adjustment unless governed by organizational policy.

FOR DEVELOPMENT NEEDS

Possible actions include:

- Training;
- coaching;
- mentoring;
- job exposure;
- cross-training;
- structured practice;
- developmental assignment;
- closer feedback.

FOR PERFORMANCE GAPS

Possible actions may include:

- Clear restatement of expectations;
- coaching;
- additional monitoring;
- specific improvement commitments;
- support;
- agreed deadlines;
- formal Performance Improvement Plan where organizational policy requires it.

The appraisal should not be confused automatically with disciplinary action.

Performance and conduct concerns may require different organizational processes.

INDIVIDUAL DEVELOPMENT PLAN

An IDP may identify:

Development Need	Required Action	Support	Timeline	Success Indicator
Presentation Skills	Deliver 2 management presentations with coaching	Manager feedback	60 days	Meets agreed presentation rubric
Coaching Skills	Practice monthly employee coaching	HR/Manager support	90 days	Coaching quality meets standard

The objective is to convert evaluation into development.

E — ESTABLISH DOCUMENTATION, FOLLOW-THROUGH, ANALYTICS, AND SYSTEM IMPROVEMENT

Performance appraisal should create usable organizational information.

APPRAISAL DOCUMENTATION

Good documentation should:

- Reflect actual discussion;
- state ratings;
- provide sufficient rationale;
- identify commitments;
- indicate development or improvement actions;
- record employee comments where the system allows;
- follow organizational confidentiality requirements.

Managers should avoid vague or emotional descriptions.

EMPLOYEE ACKNOWLEDGMENT

Organizations should clearly define what employee signature or acknowledgment means.

For example, acknowledgment may indicate:

The employee received and discussed the appraisal

rather than necessarily:

The employee agrees with every rating.

The organization's policy should define this clearly.

HR QUALITY CHECK

Before appraisal records are finalized, HR may check:

- Completion;
- missing evidence;
- unexplained ratings;
- numerical inconsistencies;
- inappropriate comments;
- missing development actions;

- calibration requirements;
- required acknowledgment;
- documentation standards.

HR review should improve system quality, not merely chase missing signatures.

USING APPRAISAL DATA

Aggregate performance data may help HR identify:

- High-performance concentrations;
- recurring competency gaps;
- organizational development needs;
- manager rating patterns;
- departments with performance issues;
- succession candidates;
- learning priorities;
- performance-improvement trends.

Appraisal data becomes more valuable when it informs decisions.

APPRAISAL SYSTEM REVIEW

HR should periodically ask:

- Do employees understand the criteria?
- Do managers understand the rating scale?
- Are KPIs aligned with current jobs?
- Are rating patterns credible?
- Is calibration working?
- Are appraisal discussions timely?
- Are development actions implemented?
- Is the process too complicated?
- Does the organization actually use the results?

A performance-appraisal system should itself be evaluated and improved.

ONE-DAY PERFORMANCE APPRAISAL TRAINING OUTLINE

Time	Modules and Essential Topics	Major Activity and Participant Output
8:00 AM–10:00 AM	MODULE 1: SET THE STANDARD—BUILDING A FAIR AND MEASURABLE PERFORMANCE APPRAISAL FOUNDATION 1. Performance Appraisal From the HR Perspective • Appraisal versus Performance Management • HR versus manager responsibilities • Why appraisal quality affects people decisions 2. The MSS A.P.P.R.A.I.S.E. Framework • Align, Prepare, Pinpoint, Rate, Align, Interview, Set, Establish 3. What Should Be Evaluated? • Job accountabilities • KPIs/results • competencies • workplace behaviors 4. Aligning the Appraisal System • Strategic priorities → Job Description → employee scorecard → appraisal • Preventing evaluation against unclear expectations 5. Developing Rating Standards • Performance criteria • rating scales • behavioral anchors • evidence requirements • separating results from behaviors	Major Activity: Appraisal System Quality Lab — Participants review a poorly designed appraisal form and identify vague criteria, unmeasurable expectations, misaligned Job Description items, weak rating definitions, and subjective behavioral statements, then redesign selected components. Major Output: Performance Appraisal Criteria, Rating Standards, and Evidence Matrix
10:00 AM–10:15 AM	MORNING BREAK	

Time	Modules and Essential Topics	Major Activity and Participant Output
10:15 AM–12:00 NN	MODULE 2: RATE THE PERFORMANCE—EVIDENCE, OBJECTIVITY, RATING BIAS, AND CALIBRATION 1. Evaluating Actual Versus Expected Performance • Target versus actual • results versus activity • evidence versus opinion 2. Building the Evidence Base • KPIs, outputs, observations, customer feedback, project results, documented performance information 3. Common Rating Biases • Halo, horns, recency, primacy, leniency, strictness, central tendency, similarity, contrast, and personal-liking bias 4. Writing Defensible Ratings and Comments • Explaining why the score is justified • Specific examples and performance evidence 5. HR-Led Calibration • Comparing rating interpretation across managers • Identifying rating anomalies • Challenging scores with evidence rather than politics	Major Activity: Employee Performance Rating and Calibration Challenge — Participants independently evaluate several employees using identical evidence, compare the resulting scores, identify rating biases, defend their conclusions, and participate in a simulated HR-facilitated calibration meeting. Major Output: Completed Employee Performance Evaluation, Rating Rationale, and Calibration Record
12:00 NN–1:00 PM	LUNCH BREAK	
1:00 PM–3:00 PM	MODULE 3: HAVE THE CONVERSATION—DELIVERING APPRAISAL RESULTS AND HANDLING EMPLOYEE REACTIONS 1. Preparing for the Appraisal Discussion	Major Activity: Performance Appraisal Conversation Simulation — Participants conduct realistic appraisal conversations involving a high performer, a satisfactory performer, and/or an employee disputing a low rating. Observers assess evidence use,

Time	Modules and Essential Topics	Major Activity and Participant Output
	- Evidence - accomplishments - performance gaps - likely employee reactions - required next steps 2. Structuring the Appraisal Conversation - Purpose → employee reflection → strengths → gaps → rating → employee perspective → next actions 3. Giving Effective Performance Feedback - Specific - evidence-based - behavior- and results-focused - actionable 4. Communicating Difficult Ratings - Addressing below-expectation performance - avoiding defensiveness, blame, vagueness, or false reassurance 5. Handling Employee Disagreement - Listening - returning to standards and evidence - documenting perspective - following organizational review procedures	fairness, clarity, listening, feedback quality, accountability, and closure. Major Output: Employee Appraisal Conversation Guide and Feedback Documentation
3:00 PM–3:15 PM	AFTERNOON BREAK	
3:15 PM–5:00 PM	MODULE 4: TURN RATINGS INTO RESULTS—DEVELOPMENT ACTIONS, DOCUMENTATION, ANALYTICS, AND HR GOVERNANCE 1. From Appraisal Result to Management Action - Recognition - development	Major Activity: A.P.P.R.A.I.S.E. HR Governance and Action Challenge — Participants analyze organization-wide appraisal results, identify rating inconsistencies and development patterns, determine appropriate employee actions, and recommend improvements to the appraisal process.

Time	Modules and Essential Topics	Major Activity and Participant Output
	• coaching • performance improvement • differentiating responses according to need 2. Developing Employees After Appraisal • Individual Development Plans • stretch assignments • learning interventions • coaching • career development 3. Addressing Significant Performance Gaps • Clear improvement expectations • actions • support • deadlines • success measures • follow-through 4. HR Appraisal Governance • Documentation quality • completion • calibration • records • consistency • confidentiality • system integrity 5. Using Performance Data Strategically • Rating distributions • competency gaps • organizational learning needs • talent information • system-improvement opportunities	Major Output: Performance Appraisal HR Governance Checklist, Employee Development/Improvement Plan, and 30-, 60-, or 90-Day Appraisal System Improvement Roadmap
5:00 PM	PROGRAM CLOSING	Learning synthesis, commitments, evaluation, and recommended next steps

MAJOR PARTICIPANT OUTPUTS

Participants are expected to complete:

1. **Performance Appraisal Criteria, Rating Standards, and Evidence Matrix**
2. **Completed Employee Performance Evaluation, Rating Rationale, and Calibration Record**
3. **Employee Appraisal Conversation Guide and Feedback Documentation**
4. **Performance Appraisal HR Governance Checklist, Employee Development/Improvement Plan, and 30-, 60-, or 90-Day Appraisal System Improvement Roadmap**

SAMPLE EMPLOYEE PERFORMANCE APPRAISAL SITUATIONS

Activities may be customized around situations such as:

- Employee exceeding KPI targets but demonstrating poor teamwork;
- highly engaged employee missing measurable targets;
- employee rated highly because of one major success;
- employee being penalized for one recent error;
- manager rating everyone above expectations;
- manager giving nearly everyone a satisfactory rating;
- employee contesting an appraisal score;
- employee blaming another department for missed targets;
- employee claiming insufficient resources;
- highly experienced employee resisting feedback;
- newly hired employee with incomplete-period data;
- employee performing strongly in results but poorly in compliance;
- supervisor unable to justify competency ratings;
- rating based mainly on attendance rather than performance;
- employee surprised by a low annual rating;
- manager documenting performance concerns for the first time at appraisal;
- disagreement between department head and HR during calibration;
- manager wanting to change ratings after learning another department's scores;
- multiple employees receiving identical ratings despite substantially different results;
- strong employee ready for development;
- underperforming employee requiring structured improvement;
- employee performing well but lacking capability for the next role;
- appraisal form containing outdated Job Description responsibilities;
- KPIs no longer aligned with current work;
- organization redesigning its appraisal system.

SAMPLE PERFORMANCE APPRAISAL SCORECARD STRUCTURE

A practical employee appraisal may include:

Performance Component	What Is Evaluated	Example Evidence
Results / KPIs	Achievement of measurable outcomes	KPI scorecard
Job Accountabilities	Fulfillment of core responsibilities	Work outputs, completion records
Competencies	Demonstrated job capability	Behavioral evidence
Organizational Behaviors / Values	Required workplace behaviors	Documented observations
Development Commitments	Progress on agreed development	IDP results

The exact weights should be customized to the organization's performance-management methodology.

SAMPLE PERFORMANCE APPRAISAL LOGIC

For illustrative purposes only:

Strategic / Job Result

Collection Efficiency

Target

≥ 95%

Actual

92%

Evidence

Validated Finance performance report

Rating

Based on the organization's approved rating methodology

Performance Discussion

Determine:

- Why is there a gap?
- What was within employee control?
- What support is required?
- What should improve?

- What deadline applies?

The score should lead to management action—not merely remain on the appraisal form.

TRAINING METHODS

This **Training on Employee Performance Evaluation in the Philippines** follows MSS Corporation's **EnterTRAINment** methodology:

- Approximately **30% concise trainer input, demonstrations, facilitated discussion, and synthesis**
- Approximately **70% appraisal-form analysis, rating exercises, bias identification, calibration, feedback practice, appraisal role plays, HR analytics exercises, and workplace application**

Methods may include:

- Appraisal system self-assessment;
- performance-management versus appraisal exercise;
- criteria-writing workshop;
- KPI-to-appraisal alignment;
- rating-scale analysis;
- behavioral-anchor exercise;
- evidence-versus-opinion challenge;
- employee-rating simulation;
- bias-identification cases;
- rating-comment writing;
- calibration simulation;
- appraisal-interview role play;
- difficult-feedback simulation;
- employee-disagreement scenario;
- IDP development;
- performance-improvement planning;
- HR governance review;
- rating-distribution analysis; and
- appraisal-system improvement planning.

TARGET PARTICIPANTS

This **Employee Performance Appraisal Training in the Philippines** is recommended for:

- HR Managers;
- HR Supervisors;
- HR Business Partners;
- Human Resources Officers;
- Performance Management personnel;

- Organization Development professionals;
- HR Generalists;
- Talent Management professionals;
- Learning and Development Managers;
- Department Heads;
- Managers;
- Assistant Managers;
- Supervisors;
- Team Leaders;
- Branch Managers;
- Operations Managers;
- functional leaders responsible for evaluating employees;
- business owners of growing organizations;
- employees responsible for designing or administering appraisal systems; and
- managers required to conduct formal employee performance evaluations.

RECOMMENDED NUMBER OF PARTICIPANTS

Approximately **12 to 20 participants** is recommended for rating exercises, calibration, appraisal-conversation simulations, and individualized facilitator feedback.

Groups of up to approximately 25 participants may be accommodated through:

- Rating panels;
- role-play triads;
- calibration teams;
- observer roles;
- breakout exercises; or
- additional facilitation support.

For organization-wide standardization, a mixed group of **HR professionals and employee evaluators** can be particularly valuable.

DELIVERY OPTIONS

The program may be delivered through:

- Face-to-face in-house training;
- live virtual instructor-led training;
- hybrid training;
- public seminar;
- HR capability-development program;
- manager orientation;

- Performance Management implementation;
- appraisal-system rollout;
- rater-certification program;
- HR transformation initiative; or
- customized training-and-consultancy engagement.

AVAILABLE PROGRAM FORMATS

Half-Day Performance Appraisal Fundamentals

Recommended for:

- Appraisal purpose;
- performance criteria;
- rating scales;
- evidence;
- rating bias;
- appraisal conversation basics.

The half-day version contains exactly two modules.

One-Day Performance Appraisal Training

Recommended for the complete **MSS A.P.P.R.A.I.S.E. Framework**, covering appraisal alignment, criteria, evidence, rating, bias, calibration, appraisal conversations, development actions, documentation, and HR governance.

Two-Day Advanced Performance Appraisal Workshop

Recommended when the organization requires deeper work involving:

- Actual appraisal-form redesign;
- KPI integration;
- behavioral anchors;
- competency-rating scales;
- calibration cases;
- difficult appraisal conversations;
- performance-improvement planning;
- HR analytics;
- organizational rating patterns;
- policy and governance review.

Performance Appraisal Rater Development Program

May include:

1. Performance Appraisal Fundamentals
2. Understanding the Organization's Appraisal System
3. Evaluating KPIs and Results

4. Evaluating Competencies and Behaviors
5. Rating Bias Awareness
6. Writing Appraisal Comments
7. Performance Calibration
8. Conducting Appraisal Conversations
9. Development and Performance Improvement
10. Rater Assessment or Practice Certification

Performance Appraisal System Development and Implementation Engagement

MSS Corporation may support organizations requiring:

- Existing-system review;
- Job Description alignment;
- appraisal-policy development;
- scorecard alignment;
- rating-scale design;
- competency anchors;
- appraisal-form development;
- manager training;
- employee orientation;
- calibration-process design;
- rollout support;
- initial-cycle review;
- system enhancement.

CUSTOMIZATION OPTIONS

This **Training on Evaluating Employee Performance in the Philippines** may be customized using the client's:

- Strategic plan;
- Balanced Scorecard;
- company scorecard;
- departmental KPIs;
- individual scorecards;
- Job Descriptions;
- competency framework;
- organizational values;
- existing appraisal forms;
- rating scale;
- appraisal policy;
- review cycle;
- development-planning forms;
- calibration process;
- anonymized appraisal cases;

- actual performance issues; and
- HR governance requirements.

POSSIBLE PERFORMANCE APPRAISAL QUALITY INDICATORS

HR may evaluate the effectiveness of the appraisal process through measures such as:

- Appraisal completion rate;
- on-time submission rate;
- percentage of ratings supported by complete documentation;
- rating-distribution patterns;
- calibration adjustments;
- employee acknowledgment completion;
- appraisal-related grievances or disputes;
- percentage of employees with development plans;
- completion of post-appraisal development actions;
- rater-training completion;
- competency-gap trends;
- appraisal quality-review findings;
- employee perception of appraisal fairness;
- manager confidence in conducting appraisals;
- percentage of performance-improvement actions completed;
- year-to-year consistency of rating methodology.

The objective is not merely:

“Did 100% of employees receive a completed form?”

A stronger question is:

“Did the appraisal process produce objective, useful, actionable information about employee performance?”

PROFESSIONAL AND HR GOVERNANCE BOUNDARIES

This training develops employee performance-appraisal capability.

It does not automatically replace an organization's:

- Performance Management policy;
- Employee Code of Conduct;
- disciplinary procedures;
- grievance procedure;
- promotion policy;
- compensation policy;
- salary-increase methodology;

- succession process;
- legal or labor-relations procedures.

Performance appraisal results should not automatically trigger:

- salary increases;
- promotions;
- discipline;
- termination;
- bonuses;

unless these consequences are established by organizational policy and applicable requirements.

Cases involving formal disciplinary action, termination, labor disputes, discrimination allegations, harassment, protected employee rights, or other legally sensitive employment matters should be handled through the organization's appropriate HR and legal processes.

FREQUENTLY ASKED QUESTIONS

What is Performance Appraisal Training in the Philippines?

Performance Appraisal Training in the Philippines develops HR professionals' and managers' ability to evaluate employee performance objectively against agreed results, responsibilities, competencies, behaviors, and performance standards.

What is Training on Performance Appraisal in the Philippines?

Training on Performance Appraisal in the Philippines teaches participants how to prepare for appraisals, evaluate evidence, assign ratings, reduce bias, calibrate results, conduct appraisal conversations, document outcomes, and develop appropriate follow-through actions.

What is Performance Evaluation Training in the Philippines?

Performance Evaluation Training in the Philippines develops the skills required to compare actual employee performance against defined expectations and determine a defensible evaluation.

What is Training on Performance Evaluation in the Philippines?

Training on Performance Evaluation in the Philippines helps managers and HR professionals evaluate employee achievements, competencies, behaviors, and performance gaps using appropriate standards and evidence.

What is Employee Performance Appraisal Training in the Philippines?

Employee Performance Appraisal Training in the Philippines specifically focuses on evaluating individual employees through a structured appraisal process involving criteria, ratings, evidence, feedback, documentation, and development planning.

What is Training on Employee Performance Appraisal in the Philippines?

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Training on Employee Performance Appraisal in the Philippines prepares managers and HR professionals to conduct consistent and constructive employee appraisals.

What is Employee Performance Evaluation Training in the Philippines?

Employee Performance Evaluation Training in the Philippines teaches evaluators how to determine how well employees performed against their assigned expectations during a defined review period.

What is Training on Employee Performance Evaluation in the Philippines?

Training on Employee Performance Evaluation in the Philippines develops capability in evidence gathering, performance comparison, rating, feedback, and documentation.

What is Evaluating Employee Performance Training in the Philippines?

Evaluating Employee Performance Training in the Philippines focuses on the practical skills managers and HR personnel need to assess results and behaviors objectively and consistently.

What is Training on Evaluating Employee Performance in the Philippines?

Training on Evaluating Employee Performance in the Philippines teaches participants how to distinguish actual performance from impressions, effort, personality, and unsupported opinion.

What is Appraising Employee Performance Training in the Philippines?

Appraising Employee Performance Training in the Philippines prepares evaluators to rate employee performance, explain ratings, conduct performance discussions, and identify appropriate next actions.

What is Training on Appraising Employee Performance in the Philippines?

Training on Appraising Employee Performance in the Philippines helps organizations standardize how managers assess, discuss, document, and follow through on employee performance.

Is Performance Appraisal the same as Performance Management?

No.

Performance Appraisal is one component of the broader Performance Management process.

Performance Management begins with setting expectations and continues through monitoring, coaching, feedback, evaluation, development, and improvement.

Does the program cover KPI evaluation?

Yes.

Participants learn how actual KPI performance contributes to employee appraisal where KPIs form part of the organization's appraisal system.

Does it cover competencies?

Yes.

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Participants learn how competencies and behaviors can be evaluated using defined criteria and observable evidence.

Does it cover rating bias?

Yes.

The program covers major rating biases including halo, horns, recency, leniency, strictness, central tendency, similarity, and contrast effects.

Does the training include calibration?

Yes.

Participants practice a simulated HR-facilitated rating-calibration discussion.

Does the program teach managers how to give low ratings?

Yes.

The emphasis is not on making ratings harsh.

It is on making them **accurate, evidence-based, explainable, and appropriately communicated.**

Does the training cover appraisal interviews?

Yes.

Participants practice the actual conversation through role-play and receive structured feedback.

Does it address employees who disagree with their ratings?

Yes.

Participants learn how to listen, return the discussion to evidence and criteria, document the employee's perspective, and follow the organization's review mechanism.

Does it cover Performance Improvement Plans?

Basic performance-improvement planning may be included.

For more comprehensive underperformance intervention, MSS Corporation may recommend a separate **Performance Management Training** or **Managing Difficult Employees Training**.

Can we use our actual appraisal form?

Yes.

This is strongly recommended for in-house programs.

MSS Corporation may incorporate the organization's existing appraisal form, rating scale, competency model, scorecards, Job Descriptions, and anonymized appraisal situations.

Can MSS help redesign our appraisal system?

Yes.

The training may be expanded into a consultancy engagement covering:

- Appraisal-system review;
- KPI alignment;
- Job Description alignment;
- competency criteria;
- rating-scale design;
- form development;
- calibration;
- rater training;
- implementation support.

Is the training only for HR?

No.

HR professionals should understand and govern the system, but managers and supervisors who actually evaluate employees are important target participants.

Can this be delivered virtually?

Yes.

Virtual delivery may use digital appraisal cases, rating forms, breakout-room calibration, role plays, shared performance data, and appraisal-conversation simulations.

Is one day enough?

One day is appropriate for developing strong foundational capability in the complete MSS A.P.P.R.A.I.S.E. process.

Organizations redesigning an entire appraisal system may require a **multi-session workshop or consultancy engagement**, particularly when Job Descriptions, scorecards, competency frameworks, rating scales, policies, calibration, and HR systems also need revision.

RELATED MSS CORPORATION TRAINING PROGRAMS

Organizations considering this program may also explore:

- Performance Management Training;
- KPI Development Training;
- Balanced Scorecard Training;

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- Employee Accountability Training;
- Coaching and Mentoring Training;
- Managing Difficult Employees Training;
- Supervisory Development Training;
- Management Development Program;
- Competency-Based Human Resource Management Training;
- Job Analysis and Job Description Writing Training;
- Training Needs Analysis Training;
- Employee Development Planning Training;
- Succession Planning Training;
- HR Analytics Training; and
- Performance Management and Appraisal System Consultancy.

WHY CHOOSE MSS CORPORATION FOR PERFORMANCE APPRAISAL TRAINING IN THE PHILIPPINES?

HR-System Perspective, Not Just Feedback Skills

The program goes beyond teaching managers how to talk during an appraisal meeting.

It addresses:

Criteria → Evidence → Rating → Bias → Calibration → Conversation → Development → Governance

Practical MSS A.P.P.R.A.I.S.E. Framework

Participants receive a repeatable eight-stage process:

Align → Prepare → Pinpoint → Rate → Align → Interview → Set → Establish

Strong Objectivity and Evidence Focus

Participants learn to distinguish:

- Facts from opinions;
- results from effort;
- accomplishments from activities;
- standards from impressions.

Rating-Bias Reduction

Managers learn to recognize common distortions that affect employee evaluation.

HR-Led Calibration

The program develops the capability to create more consistent ratings across managers and departments.

Real Appraisal Conversations

Participants practice communicating positive, average, and difficult appraisal outcomes—not merely filling out forms.

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Development After Evaluation

Appraisal results are translated into development, recognition, coaching, or performance-improvement actions.

Alignment With Performance Scorecards

The program can integrate the organization's actual KPIs, scorecards, Job Descriptions, competencies, and rating standards.

Strong HR Governance

HR learns to evaluate not only individual employees but also the **quality of the appraisal system itself**.

Tangible Participant Outputs

Every module produces practical appraisal tools that can be applied immediately.

EnterTRAINment Methodology

Participants assess, rate, challenge, calibrate, converse, document, develop, and improve rather than merely listen.

Highly Customizable

MSS Corporation may incorporate the client's actual:

- Appraisal forms;
- Job Descriptions;
- scorecards;
- KPIs;
- competencies;
- rating scales;
- policies;
- performance situations.

CALL TO ACTION

Don't Reduce Performance Appraisal to a Rating and a Signature

Build an appraisal system that helps your organization **differentiate performance, strengthen fairness, develop employees, improve accountability, and make better people decisions**.

Equip your HR professionals, managers, supervisors, department heads, and employee evaluators to establish clear performance standards, gather evidence, rate objectively, reduce appraisal bias, calibrate results, conduct productive appraisal conversations, document outcomes, and turn employee evaluations into meaningful development and performance actions.

Partner with MSS Corporation for a customized:

- **Performance Appraisal Training in the Philippines**
- **Training on Performance Appraisal in the Philippines**

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- **Training on Employee Performance Evaluation in the Philippines**
- **Evaluating Employee Performance Training in the Philippines**
- **Training on Evaluating Employee Performance in the Philippines**
- **Appraising Employee Performance Training in the Philippines**
- **Training on Appraising Employee Performance in the Philippines**

designed around your organization's appraisal system, employee scorecards, Job Descriptions, competencies, rating standards, performance culture, and HR objectives.

With MSS, We Make Strong Success.