

# How to take part in calibration/moderation meetings

## What is a calibration meeting?

Calibration or moderation meetings are where groups of managers review their employees' performance together. They are designed to reduce bias by comparing achievement across a peer group, then differentiating those outcomes before assigning a final decision.

## Why are calibration meetings challenging?

Calibration meetings can feel daunting for four main reasons:

- We feel the need to 'fight' for our own team members.
- It is difficult to make decisions based on the requirements of the business which sometimes may be at the cost of what's fair for the team member.
- We may feel guilty if we have assured our people that they will be promoted or receive a high rating.
- Being seen as a pushover can threaten our sense of status. At the same time, conflict with colleagues can also feel challenging.

Any of these factors can cause managers to present their arguments in a way that may not be justified.

## Seven essentials

- 1 Understand the business case both for promotion and reward decisions.** It can feel tough, but decisions must be based as much on business need as on the achievement of each person. See your role as ensuring fairness for the wider organisation, not just your team member. If a business case needs to be built, the earlier you start the better.
- 2 Understand the criteria for decisions.** To give your people the best chance at promotion, bonus, or high rating, it will be important to be clear what level of performance is needed. Assessment is also likely to consider the *future* value of their role to the organisation, which may mean building further knowledge, capabilities, or competence.
- 3 Include potential costs in budget forecasts.** If your role includes workforce planning, it will be essential to make sure that potential increases have been included in budgets.
- 4 Explain the process and criteria to your team member at the start of the year.** This ensures that the process is transparent, and crucially also helps your team member to track how they are doing during the year, avoiding any surprises.
- 5 Be ready in case your team member is successful.** It will be important to have prepared a succession plan in case one of your team is selected for promotion.
- 6 Be ready in case your team member is *not* successful.** *'You are on track for promotion'* is a well-intentioned way to motivate people but they won't hear *'on track'* they only hear *'promotion'*. It can backfire badly if the opportunity goes to someone else. Even if you have avoided over-promising, your team member may be disappointed. Be prepared to re-motivate them in other ways, including building their expertise laterally, not just upward.
- 7 Finally, build your networks.** No-one has all the picture and trust plays a large part in moderation discussions. The more you have built your personal integrity among your peers the less likely they are to stick to their own agenda.

## Taking part in a calibration meeting

### Before the meeting

- **Prepare examples.** Be ready to summarise how well your people have delivered against their expectations, focusing on achievements against goals, key performance indicators, objectives, etc. Effort is also valuable where results were outside their control, but 'energetic waste' is not.
- **Look at the full picture.** Keep in mind examples may be from earlier in the performance or pay cycle. It's only human to concentrate on the latest instances, called 'recency bias', but that is unlikely to be the full picture. Feedback from key stakeholders and other sources will add essential data.

### During the meeting

- **Manage your stress.** Calibration meetings understandably raise emotions, but you will have more influence if you remain calm and measured.
- **Build rapport.** Smile and make eye contact with your peers; connection builds your influence. A gentle sense of humour also helps to keep people relaxed.
- **Be an active listener.** Focus on what other people are saying and then ask clear questions to probe for more information/ clarity of comments. Summarise your understanding.
- **Be open to hearing other views.** Acknowledge and respect others' arguments. Recognise you may not know what the other person knows, and achieving promotion for your candidate may not, in fact, be in the best interests of the organisation.
- **Challenge any views that are not in line with the data.** You may need to question any views which don't reflect written feedback.
- **Present your case with impact.** Present clear factual examples based on core criteria and use direct eye contact while you are talking. Sometimes your staff may not be as good at developing their internal image as others; make sure that they are *not* overlooked.
- **Push back if you feel railroaded.** Stay calm and clear if someone is being too forceful; say something like '*Let's take a calm look again at the criteria here*'.

### After the meeting

- **DON'T blame or say, 'I tried my best'.** If the decision does not go your way, avoid being defensive or asking for sympathy. Following these tips means you'll have done what's possible. Allow yourself to feel OK about that. Few if any organisations can promote or give raises to every deserving case.
- **DO meet with your appraisee as soon as possible.** Organisational grapevines can be remarkably well informed. Make sure you're the one passing on the decision.
- **DO plan together how to build their capability.** This will help them present a stronger case next time round. Working together on this will maintain a great relationship.

### We do performance conversations.

One-to-one discussions are a vital driver of results. Email me at [anna@oilintheengine.com](mailto:anna@oilintheengine.com), I'd be delighted to chat.

Use QR to download more conversation guides.

