

Employee Evaluation Workshop

Outline & Facilitator Agenda

Rate with Purpose. Document with Precision. Lead with Data.

Workshop Overview

This workshop equips front-line supervisors with the methodology, language, and tools to conduct meaningful, objective employee evaluations. Using the Abilities and Behaviors framework as a standalone system, or by using the RTS Employee Engagement and Evaluation System (coming summer of 2026) — participants learn to evaluate what employees can do and how they operate, document throughout the year, deliver evaluation conversations with confidence, and use evaluation data to drive development.

Target Audience	Front-line supervisors and team leads
Duration	1 Day (6–8 hours) or 2 Days (12–16 hours) — client's choice
Delivery	In-person or virtual
App Component	Includes orientation to the RTS Abilities & Behaviors App

DAY 1 — FOUNDATIONS OF AN EFFECTIVE EVALUATION

Standalone for single-day clients | Day 1 of 2 for extended format

Module	Duration
Module 1: Why Most Evaluations Fail	60 min
Module 2: The Abilities and Behaviors Framework	75 min
Module 3: Documenting Year-Round	75 min
<i>Lunch Break</i>	45–60 min
Module 4: Introduction to the Abilities & Behaviors App	60 min
Module 5: The Evaluation Conversation	60 min
Module 6: Day 1 Action Planning & Close	30 min

Module 1: Why Most Evaluations Fail

- The broken evaluation cycle most organizations are stuck in
- Recency bias, halo effect, and other common rating traps
- What employees really want from the evaluation process
- The direct cost of evaluations done poorly: morale, retention, and legal exposure
- Opening reflection: what does your current evaluation process look like?

Module 2: The Abilities & Behaviors Framework

- Defining Abilities: evaluating what an employee CAN do — skills, competencies, and technical proficiency
- Defining Behaviors: evaluating HOW an employee operates — conduct, consistency, and professionalism
- Why separating the two dimensions creates clarity and fairness
- The 0–5 rating scale: what each level looks like in observable, documentable terms
- Calibration exercise: rating real-world examples as a group
- The importance of descriptive language

Module 3: Documenting Year-Round

- Why end-of-year evaluations fail without continuous documentation
- The timestamped note: what to capture, when to capture it, and how to phrase it
- Writing objective observations vs. subjective opinions — language that holds up
- Building the evaluation from the record, not from memory
- Practice exercise: converting observations into documented notes

Module 4: Introduction to the Abilities & Behaviors App

- Overview of the RTS Abilities & Behaviors App and its role in the evaluation process
- Navigating the platform: employees, departments, ratings, notes, and reports
- Entering dual-axis ratings (Abilities and Behaviors) in real time
- Capturing timestamped notes directly in the app
- Generating individual and cross-department evaluation reports
- Hands-on orientation: guided walk-through with participant devices

Module 5: The Evaluation Conversation

- Preparing for the evaluation meeting: reviewing the record, not writing it the night before
- Opening the conversation: setting tone and intent
- Presenting ratings with evidence, not opinion
- Receiving pushback professionally without backing down or shutting down
- Closing with clarity: agreed-upon expectations and next steps
- Skill practice: structured evaluation conversation role play

Module 6: Day 1 Action Planning & Close

- Individual commitment: 3 observations I will document about my team this week
 - App setup: each participant creates or accesses their team in the Abilities & Behaviors App (if applicable)
 - Commitment cards
 - Preview of Day 2 (if applicable) / Certificate and close (if single-day)
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DAY 2 — PRECISION, DATA & EVALUATION CULTURE
2-Day format only

Module	Duration
Module 7: Calibration & Consistency Across the Team	60 min
Module 8: Setting Goals from Evaluation Results	75 min
<i>Break</i>	15 min
Module 9: Using App Data for Team-Level Insights	75 min
<i>Lunch Break</i>	45–60 min
Module 10: Difficult Evaluation Scenarios	90 min
Module 11: Building Your Evaluation Process	60 min
Module 12: Workshop Close	45 min

Module 7: Calibration & Consistency Across the Team

- What calibration means and why it matters for fairness and legal defensibility
- How the same behavior gets rated differently — and how to prevent it
- Cross-team and cross-department consistency using the 0–5 scale
- Group calibration exercise: rate the same scenario independently, then compare
- Using the app’s report view to identify rating drift over time (if applicable)

Module 8: Setting Goals from Evaluation Results

- Translating Abilities and Behaviors scores into development priorities
- Individual development planning: where to invest time and coaching
- Setting SMART goals tied to specific Abilities and Behaviors gaps
- The development conversation: moving from evaluation to action plan
- Documenting goals in the app for ongoing tracking (if applicable)

Module 9: Using App Data for Team-Level Insights (if applicable)

- Reading cross-department and team-level reports in the Abilities & Behaviors App
- Identifying trends: where is the team strong, and where are the gaps?
- Using evaluation data to inform staffing, development, and recognition decisions
- Admin-level reporting: certifications, qualifications, and verification workflows
- Hands-on exercise: generating and interpreting a team report

Module 10: Difficult Evaluation Scenarios

- Rating the high performer who has serious behavior issues
- Rating the well-liked employee who doesn’t meet the standard
- Handling disagreement and employee pushback professionally
- Documenting performance improvement situations objectively
- Evaluating remote or hybrid employees fairly
- Role play: scenario-based evaluation conversations with peer feedback

Module 11: Building Your Evaluation Process

- Creating a sustainable documentation rhythm: daily, weekly, quarterly
- Scheduling evaluation conversations that employees look forward to
- Integrating the Abilities & Behaviors App into daily leadership practice
- Department-level evaluation planning: timelines and accountability

Module 12: Workshop Close

- Key takeaways and synthesis
- Certificate of Completion presentation
- Coaching call scheduling (4 per attendee, redeemable within 6 months)
- 25% discount on all RTS products and programs
- Q&A and final reflections

Notes

This outline is a baseline and is designed to be adapted. Clients are encouraged to work with their RTS facilitator prior to delivery to prioritize modules based on their current evaluation process, adjust timing based on group size, and incorporate organization-specific job titles, behaviors, and competencies into the Abilities & Behaviors framework.

- Day 1 is designed as a complete, standalone experience. Single-day clients leave with the framework, the app orientation, and a documentation commitment.
- Day 2 builds on Day 1 and is significantly more application-focused. It should not be delivered without Day 1.
- The Abilities & Behaviors App orientation in Module 4 assumes participants have access to a device. Coordinate with the client in advance to ensure app access is set up before the workshop.
- For organizations not yet using the RTS Abilities & Behaviors App, Module 4 can be adapted to cover the methodology of the app and its benefits as a pre-purchase orientation.
- All Rising Tide Solutions workshops follow this same adaptive framework. Contact your RTS facilitator to discuss custom multi-day or combined-workshop programs.

Please be sure to reach out to RTS at any time and we will connect you with someone who can assist you and answer any questions you may have:

Email: support@therisingtidesolution.com

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“A Rising Tide lifts all boats.”