

# Performance Reviews

Maximizing the Effectiveness  
of a Powerful Business Tool



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# Does the Thought of Conducting Performance Reviews Make You Cringe?

## You're not alone.

If you're like most managers, you may find it hard to set aside adequate time, or you might dislike the emotional issues that occasionally surface during a review.

The performance review, however, is one of the most powerful tools you have for keeping and developing talent. Conducted properly, reviews can:

- Improve productivity.
- Focus department and team efforts.
- Identify areas of performance in need of improvement.
- Uncover opportunities for continued career growth.

So if you approach the employee review process with dread, anxiety or just mild annoyance, it's time to turn things around. This guide can help you streamline, standardize and get better results from your performance reviews. It contains practical suggestions to help you and your employees get the most from the process – and maybe even turn your dread into shared anticipation.



# What Can Performance Reviews Accomplish?



## A well-planned, carefully structured performance review:

- Is designed to both evaluate an employee's general performance and measure progress toward specific goals.
- Aligns the employee's goals with your organization's goals.
- Provides an opportunity to acknowledge the accomplishments of each employee, as well as address areas in need of improvement.
- Identifies the professional development and training an employee needs to support his career growth.
- Provides the employee with the opportunity to evaluate your performance as a manager.
- Looks back in evaluation and ahead in anticipation.
- Allows you to stay in touch with an employee and increase loyalty.
- Helps you make informed personnel decisions regarding promotion, job changes and termination.
- May serve as a basis for salary increases and overall compensation.



# Before the Performance Review

Careful preparation is critical to the success of your review process. Forethought and structure will help you maximize the review's overall effectiveness:

- **Plan the review well ahead of time**

Schedule the meeting with your employee at least two weeks out. This will give you both adequate time to prepare evaluations and review the last year's performance.

- **Establish a setting that encourages open communication**

Create a positive climate for discussion by holding the meeting in a private setting, free from phone or in-person interruptions. Plan to spend at least an hour on the process.

- **Explain the review process ahead of time**

Go over the process – the purpose of the review, how it will be conducted, what to expect during the discussion – ahead of time. This way, the conversation will have a structure that's clear to both you and the employee.

- **Identify trouble spots in advance**

If goals were missed, give your employee a “heads up” so he can prepare: *“We'll need to discuss why A and B were not met this year. Please come to the review having given this some thought, so we can work together on a solution.”* While it's difficult to talk with an employee about his inability to hit professional marks, it's much more awkward (and less productive) when that employee enters the review under the false impression that things are fine.



# Before the Performance Review

- **Have the employee conduct a self-review in advance**

Give your employee a self-appraisal form two weeks before the review. Ask him to rate his performance (goal attainment, satisfaction of job requirements, attitude, ability to get along with co-workers, etc.). This feedback will provide valuable insight into what your employee is thinking. It may also uncover new topics to address during the review.

- **Provide an opportunity for upward assessment**

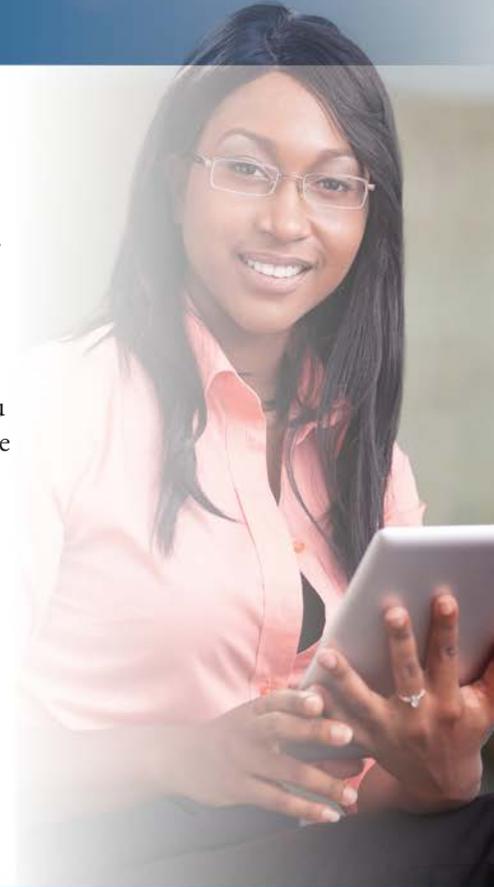
Allow your employee to rate your performance and effectiveness. You may give him a standard form to fill out and bring to the review. Or simply tell him in advance that, during the review, you can discuss your management techniques – what works best for him and what doesn't – to enhance your working relationship.

- **Do your homework**

Assess all the feedback (self-appraisal, upward assessment) your staff member has provided. Additionally, revisit his goals from last year and write down significant points to be discussed. Review the employee's work based on quantity and quality, relative to the job requirements. Prioritize and write down all the issues you want to cover.

- **Standardize the process**

As with any analytical process, your review will yield more valuable results if you use the same “measuring stick” for each evaluation. So whatever methods you use to rate performance, make sure you develop consistent review criteria across employees within a job function.



# Tips for Standardizing Performance Appraisals



- 1.** Develop an appraisal system form that relates specifically to the employee's job. Use the employee's job description to create a prioritized list of tasks and traits required to perform the job well.
- 2.** To further objectify the appraisal, create a scale to rate how well the employee performs each job duty, or exemplifies a job-related trait.
- 3.** If you are one of several managers conducting evaluations, ensure all evaluators are adequately trained on the appraisal methods and forms you use.
- 4.** Provide for occasional cross-checks to uncover bias or inconsistency among evaluators.



# During the Review

Once both you and your employee have adequately prepared for the session, it's time for the review. Here are some guidelines to ensure the process is honest, comprehensive and meaningful for both of you:

- **Begin on a positive note**

No matter how marginal the employee, initiate your conversation by highlighting positive aspects of his performance. The eventual conversation about shortcomings or missed goals will feel less dire. As a result, your employee will be more likely to keep listening and help you work toward a solution.

- **Approach the review with an open mind**

Use the prioritized discussion points you've prepared as a guideline, but be prepared to adjust or revise your agenda based on the conversation.

- **Start by evaluating primary-position responsibilities**

**Review areas of responsibility. Consider:**

- To what extent were these areas of responsibility performed well?
- In what areas did performance fall short of expectations?

Whenever possible, cite examples and note key demonstrations of competencies, areas of development and shortcomings.

- **Review each goal set for the performance period**

**To what degree were the expected results achieved?**

- What factors impacted this employee's ability to achieve his goals and produce desired outcomes?
- What hindered his success?
- What steps can you and your employee take to enhance future success?



# During the Review

- **Keep feedback about developmental areas constructive**

Always stay specific and objective. Use facts to support your feedback, rather than generalizations about character or attitude. Whenever possible, offer your employee support and training to improve problem areas.

- **Listen**

Pay attention to your employee's responses. Take note of his comments about his own performance, as well as his feedback on your performance as a manager. Take his opinions into consideration when creating goals for the coming year.

- **Develop goals for the upcoming period**

Once you've covered last year's performance, it's time to look ahead. Collaborate to develop SMART goals for the next 12 months – goals with explicit parameters that are: Specific, Measurable, Attainable, Realistic and Time Framed.

- **Devote time to planning professional development**

Your performance appraisal should serve as a springboard from which the employee can grow and advance in your company. So for every criticism, provide a suggestion on how he can improve during the coming year. Develop tactical, concrete approaches (refer to SMART goals) to overcoming shortcomings.



# After the Review

The performance review is not over once you get up from the discussion table.

As part of the ongoing process of performance management, you will get the best results from your review if you do the following:

- **Leave the door open**

Allow your employee some time to ponder what was said during the performance review. Set up a time to follow up by discussing any resulting questions or ideas that may not have come to mind during the initial review.

- **Summarize and document your review**

Write up salient aspects of the review in memo form and distribute copies to all relevant parties. This document will serve as a reference for your next review cycle.

- **Have the employee sign his evaluation**

After he has an opportunity to review and write in his own comments (i.e., whether or not, and why, he agrees or disagrees with the evaluation), require your employee to sign and date the evaluation. This will discourage employee attempts to dispute the evaluation down the road.

- **Begin a review log for next year's performance assessment**

Throughout the year, maintain a performance record log for your employee. Entries should list specific job-related behaviors and events (both positive and negative) during the performance period and how you responded. Keep an honest, ongoing dialog with your employee about his performance throughout the year, so that there are no surprises at the next review.



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