Components of a Successful Performance Review

Prepare the employee

- Ask for a self-evaluation
- Discuss use of multi-rater tool (if using)

Prepare yourself

- Begin with the end in mind
- Job description up to date
- Review supporting documentation
- Read the self-evaluation
- What is your core message?
- Focus on job related skills/behaviors
- S.M.A.R.T. goals
- Be consistent
- Resources: Managers Toolkit, your manager and HR

The conversation

- Make time & be present
- Avoid trigger words (absolutes such as: never or always)
- Fact-based communication (candid, objective, specific, unemotional)
- No surprises!
- Focus on two-way communication
TIMELINESS MATTERS
- Give performance evaluations when they are due, otherwise problems are not documented timely and deserved praise is delayed
- Employee feels de-valued – "I’m not important enough to meet with..."

OVER-EVALUATION
- Provides a false sense of security to employee
- May devalue evaluations of others
- Consider how the employee meets expectations and then adjust up or down
- Consider where this employee falls with respect to other employees

FOCUS ON BEHAVIORS
- Labels are subjective – e.g., “poor attitude” vs. actual behavior
- What did employee do behaviorally – give specifics
- Focus on the outcome or impact on others v.s. the cause of the behavior

CONSIDER PRIOR YEAR
- Review performance from the entire evaluation period, not just recent events
- Consider trend of performance appraisals from year to year
- Failed to improve vs. improved vs. continue to excel, etc.
- Have recurrent issues been addressed during the year, not just at the time of the annual performance evaluation

CHECK YOUR BIASES
- Halo effect = perfect in all respects, walks on water, deprives employee of opportunity for growth
- Horn effect = can’t do anything right! Debilitates employee when they may improve with help
- Mirror image= avoid focusing on style vs. substance – does s/he do it “like me?”; value differences!

MESSAGE DELIVERY
- Be focused and present
- Manage emotions and check your “self-talk”
- Avoid “trigger language” such as absolutes like always and never
- Avoid stereotyped language (e.g., words like rigid, resistant to change, etc.)
- Be honest, fair and strive for appropriate balance

CONSISTENCY IS KEY
- Make sure your comments are consistent with the overall ranking
- Look for trends from year to year
- Use the same standards for all employees in the same job

THINGS NOT TO MENTION
- Protected absences
- Direct comparison to other staff members

NO SURPRISES!
- Employee should have already heard about issues on an evaluation
- If information is a surprise to the employee, this means an absence of sufficient feedback during the performance period
- It also means that there probably was a lack of documentation about performance during the evaluation period
- Do not wait until an evaluation to raise concerns!

GOAL SETTING
- S.M.A.R.T. goals (specific, measurable, achievable, realistic, time defined)
- Consider individual and organizational goals for the performance period ahead

TWO-WAY COMMUNICATION
- Create the opportunity for dialog during the review. Should not be a one-sided monologue!
- Ask how you can help the employee meet goals, look for professional development opportunities, etc.