

Preparing and Conducting Performance Reviews: Best Practices for 2025

Performance reviews are not a one-off annual event; they are part of an ongoing performance management cycle. In a strong performance culture, supervisors and employees engage in regular feedback throughout the year and the formal review meeting simply summarises what has already been discussed. The resources below describe best practices for preparing for reviews, structuring documentation, writing comments, and communicating feedback.

1 Preparation and Documentation

1. **Make performance management continuous.** Wellesley College's guidelines emphasise that performance development is "about ongoing two-way communication between the employee and their supervisor" and that the annual review should summarise ongoing feedback—there should **be no surprises** during the meeting [262964383650534†L0-L8] . Ongoing check-ins and coaching help employees adjust quickly, and formal reviews become more productive.
2. **Gather facts, not opinions.** The University of Michigan's guide stresses that managers should move from an appraisal based on feelings to one "based on fact and backed up by meaningful data" ¹ . Review documentation such as goals, performance plans, coaching notes, customer comments, and prior evaluations ¹ . Seek input from co-workers or customers to minimise individual bias ¹ .
3. **Review job descriptions and goals.** Both employees and supervisors should verify that the role description reflects current responsibilities and review goals before the meeting [262964383650534†L0-L8] . If an employee has taken on responsibilities not reflected in the job description, update it accordingly [262964383650534†L0-L8] .
4. **Define evaluation criteria and make them transparent.** Teamflect's 2025 best-practice article notes that evaluation criteria should be standardised and transparent to build trust; using different criteria for each individual undermines fairness. Share rating scales and descriptors with staff ahead of the review.
5. **Include key performance indicators (KPIs) in objectives.** Objectives should be tied to KPIs so that performance can be measured. Without measurable indicators, objectives are vague and easily overlooked.
6. **Document everything.** Keep records of goals, feedback, development plans and achievements. Documenting the process provides insights into what works and ensures there is evidence to support ratings.
7. **Give the employee time to prepare.** Notify employees at least one to two weeks in advance ¹ so they can review their achievements, obstacles, and feedback from others [262964383650534†L0-L8] .
8. **Use self-assessments or pre-review forms.** The West Virginia University (WVU) guidelines recommend giving employees a pre-review form and asking them to assess their achievements and challenges before the meeting [262964383650534†L0-L8] . Self-assessments encourage reflection and make the discussion more balanced.

2 Structuring the Performance Review Document

A good performance evaluation form should be clear, logical and aligned to the organisation's competencies and goals. Common sections include:

Section	Purpose	Tips
Achievements against goals/ KPIs	Describe how well the employee met each goal.	Use specific data and examples to show progress. Include whether goals were achieved, exceeded or not achieved. Tie results to KPIs.
Competency/ behaviour assessment	Evaluate behaviours such as communication, teamwork, problem-solving, job knowledge, accountability, customer service, initiative, and leadership.	Use the organisation's rating scale (e.g., Exceeds, Achieved, Not Achieved). WVU provides sample descriptors—for example, a performer who “far exceeds expectations” consistently does outstanding work and requires written justification [262964383650534†L0-L8] .
Development areas	Identify areas for improvement and provide constructive suggestions.	Limit the number of development goals to the most critical issues 1 . Offer resources or training to support improvement.
Goals for next cycle	Set goals that are SMART —specific, measurable, actionable, relevant, and time-based [262964383650534†L0-L8] .	Align goals with team and company objectives; include KPIs and action plans for each objective.
Overall rating and summary	Provide an overall performance rating using a consistent scale.	Include a narrative that summarises key strengths and improvement areas. Ensure the overall rating corresponds to the evidence presented.
Employee comments	Give the employee space to provide feedback on the evaluation.	Encourage employees to express their views on achievements, challenges, support needed, and career aspirations.

3 Writing Effective Comments and Feedback

General principles

1. **Be specific and objective.** The Middlebury toolkit stresses that reviews should contain specific examples when referencing performance [\[262964383650534†L0-L8\]](#) . Avoid vague statements (“needs to improve communication”) and instead describe behaviours (“in meetings you often interrupt colleagues; consider pausing to allow questions” [2](#)).
2. **Balance positive and constructive feedback.** Start by recognising strengths, then address areas of improvement, and finish with encouragement—often called the “feedback

sandwich” [262964383650534†L0-L8] . Teamflect advises starting evaluations with strengths to create a comfortable environment and motivate employees.

3. **Link feedback to impact.** Describe how the employee’s behaviour affects team outcomes or organisational goals (“Your proactive approach to problem-solving has improved our team’s productivity” ³).
4. **Avoid personal attacks.** Focus on behaviours and results, not personality traits. Use “I” statements (“I’ve observed that deadlines are sometimes missed because projects start late”) rather than “You are always disorganised.” This maintains the employee’s dignity ¹ .
5. **Provide actionable suggestions.** Suggest specific actions or development opportunities (“Encouraging more team input in decision-making could increase engagement” ³). For each development area, outline resources (training, mentoring, stretch assignments) and set follow-up dates.
6. **Use consistent language and ratings.** Apply the same standards to all employees. Transparent criteria help avoid perceptions of bias.
7. **Check for bias.** Be aware of common biases (recency, halo/horns, similarity) and gather multiple perspectives (360-degree feedback) to reduce bias.

Example comment patterns

Below are examples of how to structure comments for common competencies using the format: **Positive feedback**, **Constructive feedback**, and **Employee self-reflection**. These are adapted from Quantum Workplace’s comprehensive list of phrases.

Competency	Positive feedback (example phrases)	Constructive feedback	Self-reflection prompts
Communication	<i>“You articulate complex ideas clearly and your presentations are engaging” ⁴ ; “You keep all team members informed and up-to-date” ⁵ .</i>	<i>“Consider pausing to allow questions during presentations to ensure clarity” ⁶ ; “Tailor your communication style to different audiences for better engagement” ⁷ .</i>	<i>“I communicate clearly but want to encourage more interactive discussions during meetings” ⁸ .</i>
Teamwork & collaboration	<i>“You are a unifying presence and acknowledge the contributions of others” ⁹ .</i>	<i>“Seek contributions from quieter team members” ¹⁰ ; “Balance your workload with others to ensure equitable task distribution” ¹¹ .</i>	<i>“I actively contribute but need to step back to let others lead at times” ¹² .</i>
Problem-solving & decision-making	<i>“You analyze issues from multiple angles and your proactive approach anticipates potential problems” ¹³ .</i>	<i>“Expand your analysis to include more data before making decisions” ¹⁴ ; “Develop contingency plans for high-stakes projects” ¹⁵ .</i>	<i>“I implement solutions effectively but want to involve more stakeholders in decisions” ¹⁶ .</i>

Competency	Positive feedback (example phrases)	Constructive feedback	Self-reflection prompts
Leadership & influence	<i>"You empower your team by delegating effectively and your vision is clear" ¹⁷ ; "You inspire others through your commitment to excellence" ¹⁸ .</i>	<i>"Provide more frequent constructive feedback to help team members grow" ¹⁹ ; "Balance assertiveness with empathy to enhance morale" ¹⁹ .</i>	<i>"I want to create more opportunities for my team to lead initiatives" ²⁰ .</i>
Innovation & creativity	<i>"Your creative approach to problem-solving leads to innovative solutions" ²¹ ; "You encourage a culture of innovation within the team" ²² .</i>	<i>"Brainstorm ways to foster a more innovative atmosphere in meetings" ²³ ; "Balance innovative ideas with practicality to ensure feasibility" ²⁴ .</i>	<i>"I contribute creative ideas but need to dedicate time for brainstorming and practical planning" ²⁵ .</i>

These examples illustrate how to craft feedback that is both encouraging and developmental. When writing your own comments, adapt phrasing to the individual's role and include concrete examples from your observations.

4 Conducting the Review Conversation

- 1. Set the tone and environment.** Choose a private setting where you can sit face-to-face without a desk between you to encourage open conversation ¹ . If the team is remote, use video conferencing rather than phone or email to maintain connection [\[262964383650534†L0-L8\]](#) .
- 2. Start with rapport and strengths.** Break the ice and review the positives first ¹ . Recognising achievements sets a constructive tone and increases receptiveness to feedback.
- 3. Encourage dialogue and listen actively.** A performance review is a two-way conversation [\[262964383650534†L0-L8\]](#) . Ask for the employee's perspective, self-assessment, and suggestions. Let them speak without interruption and listen to learn ¹ .
- 4. Discuss development areas respectfully.** Share concerns factually and focus on behaviours, not personal traits. Co-create solutions and action plans for improvement. Avoid bringing up too many improvement areas at once; focus on the most critical ¹ .
- 5. Link to future goals and career aspirations.** Discuss long- and short-term goals, aligning them with organisational objectives. This helps employees see how their contributions fit into the bigger picture and encourages engagement.
- 6. Address training and support needs.** Identify resources or training to help employees meet their goals ¹ . Ask what support they need from you.
- 7. Agree on follow-up and next steps.** End by summarising what was discussed, confirming goals and development actions, and scheduling follow-up check-ins (e.g., monthly or quarterly) to monitor progress. Document the agreed actions and share the summary with the employee.

5 After the Review

1. **Document outcomes and share with the employee.** Provide a copy of the final signed review and store it securely [2629643836505341L0-L8] . Documentation helps maintain accountability and protects confidentiality.
2. **Follow up regularly.** Performance management continues after the review meeting. Hold regular informal check-ins and coaching sessions. Offer feedback when tasks are completed, not just at year-end.
3. **Track progress and revisit goals.** Monitor progress toward the agreed goals and adjust as necessary. Celebrate achievements and recognise improvement.
4. **Reflect on the process.** Seek feedback from employees about the review experience. Continuously refine your evaluation form, criteria and process based on what works and what doesn't.

Conclusion

Effective performance reviews require preparation, fairness, and ongoing dialogue. By grounding evaluations in evidence, providing balanced and specific comments, and engaging employees in two-way conversations, managers create a performance management process that supports both individual growth and organisational success. Integrating KPIs, transparent criteria, SMART goals and regular check-ins ensures that reviews are meaningful and future-focused.

1 hr.umich.edu

<https://hr.umich.edu/sites/default/files/hr-mid-year-process-review-guide.pdf>

2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 Performance Review Examples, Comments, Phrases

<https://www.quantumworkplace.com/future-of-work/performance-review-examples-comments-phrases>