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E-GUIDE

MASTER THE ART OF THE REVIEW

Wanna be the best boss ever?
Then you've gotta
nail the performance review.

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Overview:

WHAT IS A PERFORMANCE REVIEW?

Yep, we're starting from square one. A "performance review" is just a formal meeting really, between an employee and their manager. What matters more is what's on the agenda: you'll discuss, evaluate, and document the employee's career development, performance on the job, and objectives for the next few months. The review is based on goals that were previously set by you or another manager, outlined during the employee's last review, or included within the job description. Beyond that almost anything goes—as a manager, you're totally responsible for when and how you discuss these topics with your employee.

HOW OFTEN DO YOU HAVE PERFORMANCE REVIEWS?

While giving reviews annually is the most common approach, we actually recommend giving quarterly reviews when possible. It's always a good idea to give frequent feedback to your employee and check in against yearly goals to confirm everyone's on the same page and on track. You said you wanna be the best boss ever, right?! A little extra effort goes a long way.

A SUCCESSFUL PERFORMANCE REVIEW CONVERSATION NEEDS:

1. *Careful planning by manager and employee*
2. *Constructive communication*
3. *Collaborative attitude*
4. *Openness to giving and receiving feedback*
5. *Commitment to "continuous improvement"*
6. *High level of accountability—good follow-through on commitments made during conversation*
7. *Openness to redefining or readjusting goals as needed (for the department and/or for the employee)*

Preparing For The Review:

STEP 1: *Set a calendar date and time in advance that is mutually convenient for both you and the employee, and that will allow enough time for each of you to do preparation.*

A conference room is a good choice for privacy and no interruptions. Schedule enough time for discussion [1 to 1.5 hours].

STEP 2: *Gather the essentials including:*

- the job description and performance objectives
- goals set from the current review period
- work rules and procedures
- your documentation notes
- any feedback or letters from customers/co-workers
- the previous performance review

STEP 3: *If you have asked the employee to do a self-review, be sure to get it early enough so you have a chance to review it as part of your preparation.*

A self-review might include questions around what the employee thinks are his/her:

- major accomplishments
- what they have done well
- areas for improvement
- performance and development goals for the next year

STEP 4: *Before filling out the review form, take a moment to:*

- list the main areas of responsibility
- what the employee has done well
- what the employee needs to improve on
- what you can do to help the employee do a better job

STEP 5: *Remember to avoid:*

- Halo Effect - tendency to overrate a favored employee or an employee who had a prior good rating
- Horns Effect - tendency to rate an employee lower than circumstances warrant
- Recency Error - letting outstanding work (or unsatisfactory work) immediately prior to the evaluation offset an entire year of performance
- Cookie Cutter Effect - not focusing on individual-specific performance (rating all of your employees or groups of employees the same).

Conducting The Review:

1. *Welcome the employee; put the employee at ease. Explain the meeting's agenda and goal.*
2. *Let the employee do the talking. Start by asking them what they think of their job performance.*
 - Listen and take notes.
 - Maintain good eye contact and attentive posture.
 - Reflect back to the employee your understanding of what the employee said.
 - Don't interrupt, but ask questions for clarification when needed.
 - Apply the 90/10 Rule: the employee talks 90% of the time and you talk 10% of the time.
 - Be non-judgmental.
3. *Compare the specific performance results and behaviors to the objectives. Stay away from an attitude or personality focus.*
4. *Ask the employee for ideas about how to resolve any problems or challenges they've mentioned.*
5. *Emphasize strengths, as well as areas that need improvement.*
6. *Be honest and be prepared to discuss questionable items.*
7. *Support the employee's effort to improve.*
8. *Set goals, expectations, timelines, and objectives together for the next performance period.*
9. *Discuss development/training plans with the employee.*
10. *This is a biggie that will set you apart: ask the employee for feedback about your own performance and whether there's anything more you should be doing to help them.*
11. *Summarize the session and end on a positive note.*

Closing And Follow-Up:

- ☐ **BOTH THE MANAGER AND THE EMPLOYEE SHOULD SIGN THE REVIEW.**

Signing the review does not mean the employee agrees with the review; it means that the review has been shared with the employee. The employee can provide a written response, which is optional.

- ☐ **PROVIDE THE EMPLOYEE WITH A COPY, AND THE ORIGINAL SHOULD GO IN THE EMPLOYEE'S HR FILE.**

- ☐ **YOU AND THE EMPLOYEE SHOULD EXCHANGE ONGOING FEEDBACK ABOUT PERFORMANCE GOALS AND STANDARDS THROUGHOUT THE YEAR.**

NEED SOME EXTRA GUIDANCE?

Our mentors can help you hone your performance review skills in a 50-minute personalized session.
Hire a Mentor at: careercontessa.com/hire-a-mentor