

Performance Review Guidelines

Purpose

This document outlines AnyCompany's performance review process, designed to:

- Provide structured feedback on employee performance
- Recognize achievements and contributions
- Identify areas for development and growth
- Align individual goals with company objectives
- Support career development planning

Performance Review Cycle

Annual Review Schedule

- **January-February:** Goal setting for the year
- **April:** Q1 check-in
- **July:** Mid-year review
- **October:** Q3 check-in
- **December-January:** Annual performance review

Review Components

1. **Self-assessment:** Employee reflection on achievements, challenges, and goals
2. **Manager assessment:** Manager evaluation of performance against goals
3. **Peer feedback:** Input from colleagues (where applicable)
4. **Performance discussion:** Collaborative meeting between employee and manager
5. **Development planning:** Identifying growth opportunities and next steps

Performance Rating Scale

AnyCompany uses a 5-point rating scale:

1. **Exceptional Performance (5)**
 - Consistently exceeds all expectations
 - Delivers results with significant impact
 - Demonstrates leadership beyond role requirements
 - Serves as a role model for others
2. **Exceeds Expectations (4)**
 - Regularly exceeds most expectations
 - Delivers results above requirements
 - Takes initiative beyond assigned responsibilities
 - Makes valuable contributions to team success
3. **Meets Expectations (3)**
 - Consistently meets all expectations
 - Delivers on commitments reliably
 - Performs all aspects of the role effectively
 - Contributes positively to team environment
4. **Partially Meets Expectations (2)**
 - Meets some but not all expectations
 - Delivers inconsistent results
 - Requires more guidance than expected

- Shows willingness to improve
- 5. Does Not Meet Expectations (1)**
- Consistently falls short of expectations
 - Fails to deliver on key commitments
 - Requires significant supervision
 - Shows limited improvement despite feedback

Assessment Categories

Performance is evaluated across these key categories:

1. Goal Achievement

- Progress against established objectives
- Quality and timeliness of deliverables
- Impact of results on team/department/company

2. Job Knowledge and Skills

- Technical proficiency
- Problem-solving capabilities
- Application of professional expertise

3. Communication and Collaboration

- Written and verbal communication
- Team collaboration
- Cross-functional partnerships
- Client/customer interactions

4. Innovation and Improvement

- Creative thinking and problem-solving
- Process improvements
- Adaptability to change
- Learning agility

5. Leadership (if applicable)

- Team development
- Strategic thinking
- Decision-making effectiveness
- Influence and inspiration

Best Practices for Managers

Before the Review

- Collect relevant performance data throughout the review period
- Review the employee's self-assessment thoroughly
- Gather feedback from appropriate stakeholders

- Prepare specific examples to support your assessment
- Schedule adequate time in a private setting

During the Review

- Begin with positive feedback
- Focus on behavior and results, not personality
- Provide specific examples
- Listen actively to the employee's perspective
- Discuss development opportunities constructively
- Establish clear expectations for the future

After the Review

- Document the discussion and agreements
- Follow up on action items
- Provide ongoing feedback between formal reviews
- Recognize progress and improvements

Best Practices for Employees

Before the Review

- Complete your self-assessment thoroughly and honestly
- Gather evidence of your achievements
- Reflect on challenges and learning opportunities
- Prepare questions about career development
- Consider your goals for the coming period

During the Review

- Be open to feedback
- Ask clarifying questions
- Share your perspective respectfully
- Discuss support needed for success
- Engage actively in development planning

After the Review

- Review and reflect on the feedback received
- Create an action plan for development areas
- Seek ongoing feedback throughout the year
- Track progress against goals

Performance Improvement Plans (PIPs)

When performance consistently falls below expectations, a Performance Improvement Plan may be implemented:

1. **Initiation:** Manager identifies significant performance gaps
2. **Documentation:** Specific performance issues are documented

3. **Plan Development:** Clear objectives and timeline established
4. **Support Resources:** Training or coaching provided
5. **Regular Check-ins:** Weekly or bi-weekly progress reviews
6. **Outcome Determination:** Successful completion or further action

Linking Performance to Rewards

Performance ratings influence:
- Annual merit increases
- Bonus eligibility and amounts
- Promotion considerations
- Development opportunities

Special Considerations

New Employees

- Employees with less than 3 months tenure receive an informal review
- Employees with 3-9 months tenure receive a modified review

Role Changes

- Goals should be reassessed when an employee changes roles
- Performance in both roles should be considered proportionally

Extended Leave

- Goals and expectations should be adjusted to account for approved leaves of absence

Conclusion

Effective performance management is a continuous process of setting expectations, providing feedback, and supporting development. These guidelines aim to create a fair, consistent, and growth-oriented approach to performance reviews across AnyCompany.