

# 4-STEP FRAMEWORK FOR PERFORMANCE REVIEWS

For managers, conducting effective performance review conversations can be one of the most difficult parts of their job. However, these conversations are crucial because they help employees grow professionally, identify blind spots in their performance, and review how they've improved since their last review.

Use the following framework to make sure you're set up for success before you conduct your next performance review.

## 1. Treat it as a yearlong activity.

Don't begin prepping for the performance review conversation in the days or weeks before the conversation is planned. As a manager, it's best to collect notes and observations throughout the year so when the review comes around, you're prepared with all the information needed. This will ensure the review will be beneficial for both you and the employee.

**ACTIONABLE TIP:** Create a file of observations of each team member's successes, challenges, and potential areas for development.

## 2. Set expectations and goals.

Setting up a meeting with each team member to discuss expectations and goals is a best practice for all managers who lead a team. These expectations and goals are a great way to start the performance review conversation and allow you to have an open conversation about goals so employees are informed of their progress before the performance review.

**ACTIONABLE TIP:** Set up questions you want answered in your meeting, such as "What has been accomplished?" and "Were goals reached in the determined timeline?"

## 3. No big surprises.

There shouldn't be anything in the annual performance review that comes as a big surprise for any team member. The most effective managers have regular meetings with team members about progress toward goals and offer feedback the moment it's needed. Feedback on performance should be ongoing and addressed in the present moment rather than once a year.

**ACTIONABLE TIP:** Offering feedback doesn't need to be a formal process. It can simply include sharing a grateful comment when appropriate or suggesting how a task or situation can be approached slightly differently for more effectiveness.

## 4. Avoid one-sided conversation.

Performance review conversations should include both sides; it's a conversation, not a lecture. Make sure team members get the opportunity to share their perspectives and explain their decision-making process that affects a particular behavior. Also, allow them to take part in setting some of their own goals and steps for achieving them so they're fully involved in their own performance review.

**ACTIONABLE TIP:** Ask your employees how you as their manager can best support them. Give them the chance to give you feedback on your management and listen with the intent to learn.