

CORE RESPONSIBILITIES

Chapter 8

PERFORMANCE REVIEW

- 8.1 The Secret to Successful Performance Reviews
- 8.2 The Three Core Questions of Performance Reviews
- 8.3 Performance Review Steps
- 8.4 A Simple Performance Review Format
- 8.5 How to Build on Strengths
- 8.6 Five Ways to Mitigate Weaknesses
- 8.7 How to Have a Productive Performance Review Meeting

Lack of feedback is the number one reason for performance problems.


Leigh Branham
Author

8.1 The Secret to Successful Performance Reviews

ABOUT THIS TOOL—Performance review is a fact of life in most organizations. The most successful performance review experiences are a dialogue between two people with the aim of taking stock and planning for the future.

While the form for this purpose may facilitate or impede communication, in the end it is the commitment of the manager to the employee's development and success that matters most.

APPLICATION—Consider how you can use the performance review process to bolster your employee's performance, further their professional growth, and strengthen your relationship with them.

A graphic of a scroll with a light gray background and a black outline. The scroll is partially unrolled at the top and bottom. The text is centered on the scroll.

It's not about the
form.

It's about the
manager's
commitment.

Source: Developed by the author

8.2 The Three Core Questions of Performance Reviews

ABOUT THIS TOOL—In the end, performance reviews come down to helping answer three questions on the minds of employees.

APPLICATION—Use these questions to guide your preparation of the performance review and subsequent conversation with the employee.



Source: Developed by the author

8.3 Performance Review Steps

ABOUT THIS TOOL—A performance review synthesizes the manager's experience of the employee's performance over the past year, taking into consideration the employee's self-assessment and mutual hopes for the employee's future contribution and learning.

APPLICATION—Follow these steps in planning, writing, and finalizing the performance review.

<p>1. Make an appointment</p>	<p>Nothing like a deadline to help get things done!</p> <p>Let the employee know when their self-assessment is due, and in what form—in writing, in person, or some combination of the two.</p>
<p>2. Reflect</p>	<p>Think about:</p> <ul style="list-style-type: none"> <input type="checkbox"/> The employee's strengths and how to build on them (Tool 8.5). <input type="checkbox"/> The employee's weaknesses and how to mitigate them (Tool 8.6). <input type="checkbox"/> The challenges the employee faced and how they dealt with them. <input type="checkbox"/> How effectively the employee works with others. <input type="checkbox"/> How the employee could increase their effectiveness. <input type="checkbox"/> What would be beneficial for the employee to learn. <input type="checkbox"/> Review the employee's self-assessment. <input type="checkbox"/> Check the employee's job description. Does it need updating?
<p>3. Draft the review</p>	<ul style="list-style-type: none"> <input type="checkbox"/> List the employee's accomplishments and strengths. <input type="checkbox"/> Describe any <u>material</u> concerns, that is, those affecting the employee's success or impacts others negatively. Be sure to describe the desired behavior, too! [Tool 9.4] <input type="checkbox"/> List two or three goals for the coming year. <input type="checkbox"/> List one or two professional development priorities. <input type="checkbox"/> Give the employee the review the day before or the morning of the review.
<p>4. Meet</p>	<p><i>Tool 8.7</i></p>
<p>5. Finalize the review</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Revise the review based on the discussion. <input type="checkbox"/> Send a copy to human resources and a copy to the employee. <input type="checkbox"/> Set appointments to follow-up as agreed.

Source: Developed by the author

8.4 A Simple Performance Review Format

ABOUT THIS TOOL—Debates about performance review forms are endless. Here’s a format I like that balances a review of the past with a look ahead. Just remember the message of Tool 8.1! The commitment of the manager to a quality discussion about performance is of far greater importance than the form.

APPLICATION—Adapt this approach to meet your needs, the needs of your team, and the requirements of your organization.

A LOOK AT THE PAST	A PLAN FOR THE FUTURE
A. What were the highlights and notable achievements of the employee this past year?	A. What does the employee need/want to achieve in the coming year that meets the needs of the team and builds on their interests and strengths?
B. What did the employee find challenging? What goals may have been missed and why?	B. What challenges may the employee face? How might these challenges be mitigated?
C. What did the employee learn?	C. What does the employee most want to learn that also meets the needs of the team/organization?
	D. In what ways can you support the employee’s success in the coming year?

Dates for quarterly or midyear check-in meetings

Manager’s Comments

Employee’s Comments

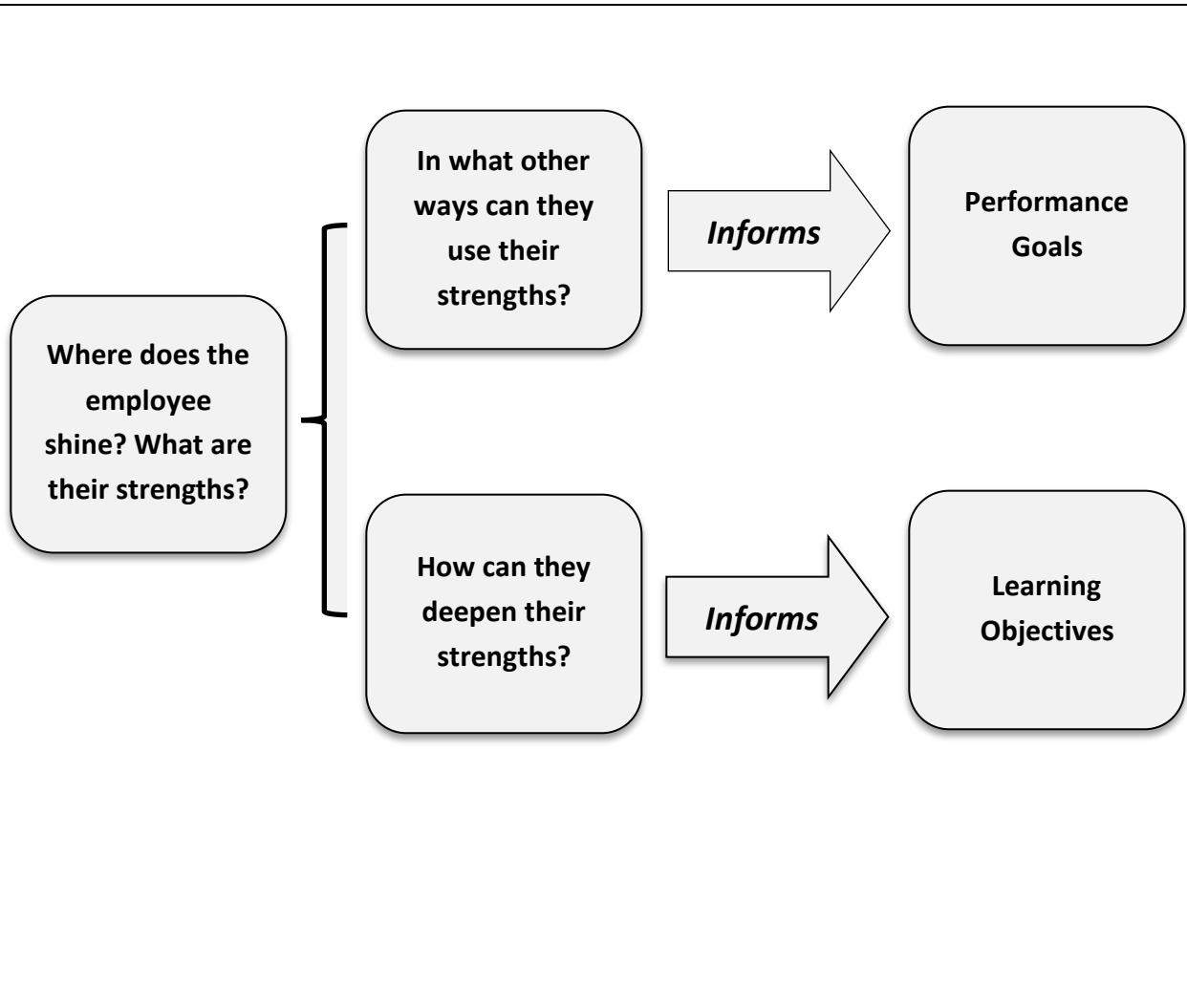
Signatures

Source: Developed by the author

8.5 How to Build on Strengths

ABOUT THIS TOOL—Helping an employee identify and build on their strengths is the surest way to fully tap their talent and maximize their contribution to the team’s and organization’s success.

APPLICATION—Follow this sequence of questions to identify specific ways to use the employee’s strengths more fully.



Source: Developed by the author

8.6 Five Ways to Mitigate Weaknesses

ABOUT THIS TOOL—Here are five ways to mitigate areas of weakness in an employee’s performance.

APPLICATION—Consider the promise and practicality of following one of these approaches to mitigate an employee’s perceived weakness.

Drop it

- What would be the impact of simply removing this duty from the employee's responsibilities? If manageable, then drop it.

Modify it

- Can the responsibility be reduced in scope or simplified so that the employee is more likely to accomplish it?

Reassign it

- Can the activity be fairly reassigned to another employee, with or without modification?

Exchange it

- Similar to the above, can the activity be fairly exchanged for something another employee is doing?

Partner or Mentor

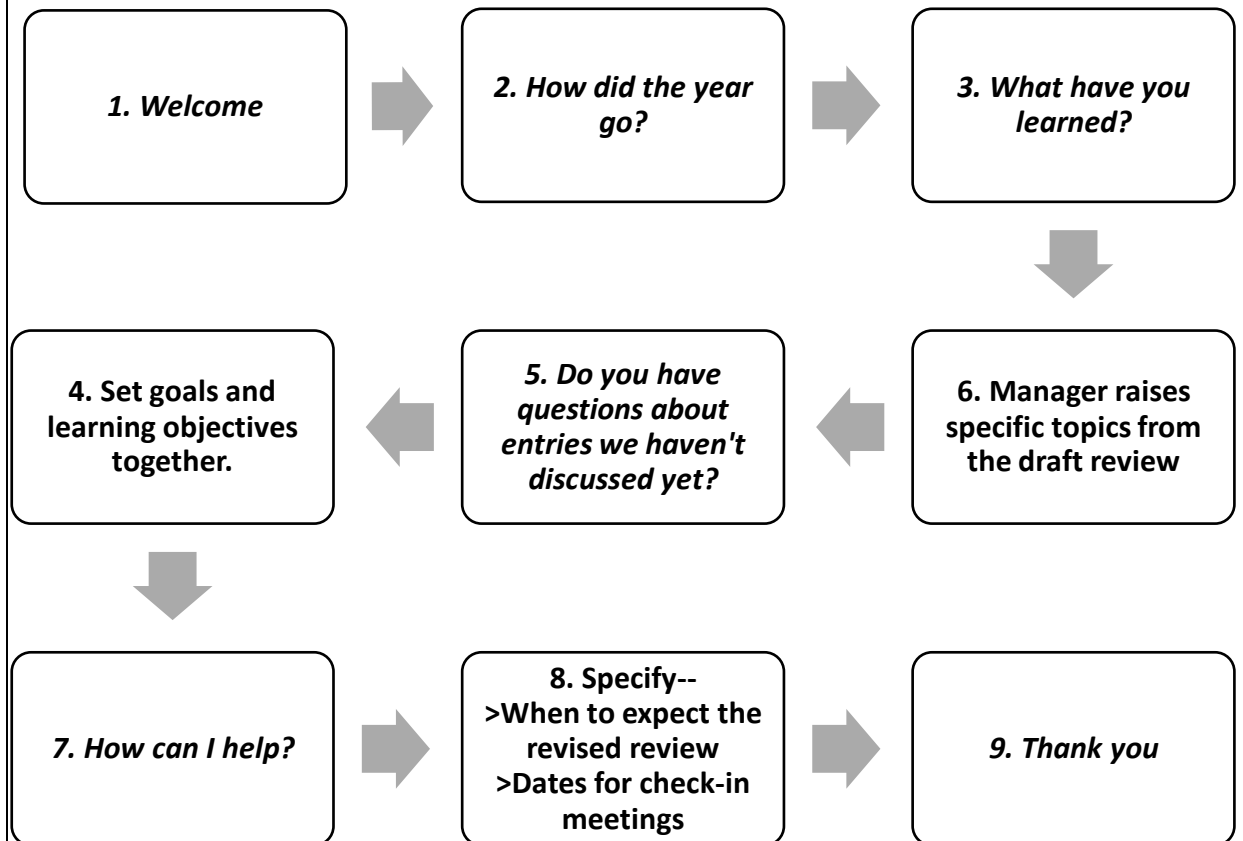
- Is there another employee who can partner or mentor the employee to accomplish the task successfully?

Source: Developed by the author

8.7 How to Have a Productive Performance Review Meeting

ABOUT THIS TOOL—The following sequence is the genius of participants in a workshop I led some years ago. Following it balances the voice of the manager with that of the employee, thus assuring a productive meeting regardless of the form that is used.

APPLICATION—Follow this sequence in meeting with the employee to discuss the performance review. It works!



Source: Developed by the author

