



Monthly Strategies

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Performance Reviews

The performance review is a crucial part of the ongoing dialogue between managers and employees. It summarizes ongoing performance and development conversations and provides a record of past performance and expectations for work moving forward.

Outcome of Effective Performance Evaluations:

- Shared responsibility in a collaborative and open feedback process
- Recognition for contributions and coaching for improvements
- Alignment of individual tasks to team and departmental goals
- Clarification of expectations and resources
- Commitment to continuous improvement and follow-through

Best Practices for the Performance Review Process:

- Manager and employee review job description and update as needed
- Employee submits written Self-Assessment to manager
- Manager solicits multi-rater feedback from colleagues, customers, and direct reports
- Manager documents performance in written Annual Performance Review
- Annual and mid-year conversations are held to align and adjust expectations and goals
- Annual performance reviews should be linked to Annual Salary Review
- Manager and employee regularly discuss progress towards performance and development goals

Preparing for the Performance Review:

When both the manager and employee prepare for the performance review, it can lead to an effective

and meaningful review process. Begin the process by:

- Reviewing documents and conversations
 - Last year's performance review
 - Mid-year check-ins
 - Job description
 - Employee Self-Assessment
 - Notes accumulated during the year
- Identifying the following:
 - Accomplishments
 - Progress on goals
 - Areas of exceptional performance
 - Areas of growth
 - Additional responsibilities taken on
 - Contributions to special projects
 - Challenges encountered
 - Areas where development is needed or desired
 - Key messages to convey

Writing the performance review

- Use clear, concise language to describe:
 - Performance compared to agreed-upon expectations
 - Key accomplishments and contributions
 - Examples of strengths and development opportunities
 - Key expectations for the coming year
- Focus on observable and measurable performance
- Cite specific examples
- Provide actionable feedback
- Avoid vague statements and exaggerations
- Celebrate successes and position shortfalls as an opportunity for learning and adjustment
- Use bullet points, if desired

Preparing for the Performance Review

Conversation:

The most important aspect of a performance review is the review conversation. Preparing for the conversation will help guide a productive conversation. Consider what to communicate and what you want to learn:

- Review accomplishments, strengths, obstacles, and areas for development
- Consider achievement towards goals and what might be needed moving forward
- Determine the most important messages to convey
- Determine the right setting and amount of time needed for the conversation
- Be prepared to give and receive feedback

Having the Performance Review Conversation:

During the performance review conversation, the manager and employee should:

- Review any agreed-upon “next steps” or commitments from the most recent performance conversation
- Review successes since the last conversation, making sure to identify specific results achieved
- Review any obstacles encountered since the last conversation. Why did they arise? What are some possible ways to deal with them?
- Establish SMART goals for moving forward (Specific, Measurable, Attainable, Realistic, Time-bound)

After the Performance Review Conversation:

Following the performance review conversation, the manager and employee should:

- Record notes from the meeting
- Reflect on how the meeting went and what you could do differently for future meetings
- Plan for follow-up discussion on any open issues and to check in on goals

HR Strategies can help . . .

HR Strategies’ staff can provide onsite or virtual training for your organization. Our team will develop and deliver tailored training programs to

meet the needs of your staff. Some of the programs we currently offer are:

- Active Shooter / Active Threat – How to Survive
- Active Shooter / Active Threat – Preparedness and Recovery
- Being Accountable
- Building Win-win Relationships with your Manager
- Building & Leading Teams
- Business Etiquette and Remaining Tactful and Diplomatic
- Coaching, Documentation and Termination Workshop
- Collaboration
- Communication Essentials – Part I
- Communication Essentials – Part II
- Conflict Management
- Conflict Management & Resolution
- Confronting Difficult Behavior
- Customer Service
- Leading a Customer-Centric Culture
- Developing the Team and its Culture
- Directing Others
- Diversity, Respect and Harassment Free Workplace
- Drug and Alcohol Awareness
- Employee Time Management
- Establishing Goals, Roles & Guidelines
- First Time Manager Challenges
- FSLA and FMLA Training for Supervisors
- Fostering a Customer Mindset
- Fundamentals for Effective Communication
- Generational Differences
- Giving Feedback Effectively
- Harassment Prevention for Employees
- Harassment Prevention for Managers

Contact HR Strategies to schedule your organization’s compliance and/or development training.

Contact HR Strategies at 302.376.8595 or info@hrstrategies.org if you would like support or would like to learn more about the items in this newsletter.

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