



CONDUCTING YOUR FIRST

# PERFORMANCE REVIEW

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2020



# Outline

**What we'll cover**

Research

Preparation

Environment

Key Performance Indicators

Structure

Language Choices

Goal Setting

Examples

# Research

## Gather resource documents

These can include:

- job description
- previous years' review
- quarterly reviews from previous year
- one on one meeting notes
- projects attempted
- projects completed
- previous goals
- peer and self-reflections



# Preparation

## OUTLINE THOUGHTS

Give yourself a guide to follow during the review process

## BE OPEN AND HONEST

Keep kind honesty in mind as you collect your thoughts

## COLLECT PEER FEEDBACK

Include anonymous feedback from peers as a motivating component

## SET GOAL

Decide what you want them to take away from the review experience

# ENVIRONMENT



## COMFORTABLE

Choose a location where the employee will not feel intimidated -- *sit next to them to work together as a team!*



## DISTRACTIONLESS

Put away phone, turn off notifications, set chat to do not disturb -- *create an environment that is dedicated to the review!*



## PRIVATE

Make sure the sensitive conversation is unable to be overheard by others -- *treat the information as confidential!*



# Performance Rating

Assessing Progress



Personal Goals



Company Goals



Competency



Achievement



# Core Competencies

Assessing Progress



Delivering Results



Customer Focus



People Development



Communication



Problem Solving



# REVIEW STRUCTURE

## STEP 1 RECOGNITION

Recognize positive contributions to projects and people the employee made over the last year

## STEP 2 SCORING

Discuss how employee met, didn't or exceeded expectations in each of the performance areas

## STEP 3 SETTING GOALS

Establish goals together for improvement in each of the performance areas as needed

## STEP 4 PLAN OF ACTION

Create a plan of action with timelines and specific tasks to help employee achieve their goals



# Language Choices

Avoid general language and use action words like:

- Excels
- Decisive
- Responsive
- Dedicated
- Knowledgeable
- Honest
- Thorough
- Develops
- Initiative

Using more **descriptive** language with employees makes for a more **meaningful** review!

# GOAL SETTING



## **review old goals**

Were they met? Were they reasonable? What roadblocks were encountered in the process?

## **target roadblocks**

Determine what could stop the employee from reaching the goals they are setting

## **practicality**

How reasonable are the goals that the employee is setting? Do they need more time or resources?

## **timeliness**

Are the goals the employee is choosing a good fit for the quarter they selected?

# EXAMPLE ONE



Amy has been with Genesis for 6 months and has never been through a formal review.

## Review

Amy's manager is sensitive to Amy's hesitations and helps her feel at ease by explaining each step of the review process.



## Outcome

Amy felt heard and supported during her review which prompted her to be more open about asking for help informally and during her one on ones with her manager.

# EXAMPLE TWO



Jordan has been with Genesis for 3 years and has been through a few annual reviews.

## Review

Jordan's manager thinks Jordan knows what to expect and that they will ask for help if they need it. The review is very short and Jordan provides basic input.

## Outcome

Jordan isn't invested in their performance and they check out. Jordan isn't motivated and is now a passive employee who only does enough to get by.

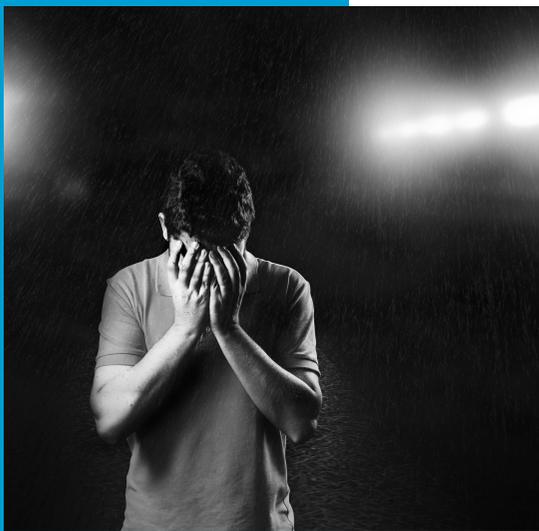
# EXAMPLE THREE



Paul has been with Genesis for a little over a year and has not yet had an annual review.

## Review

Paul's manager lets Paul take the reins of the review conversation as Paul is very excited and has driven most of the performance discussions so far.



## Outcome

Paul initially feels the review went well, but soon realizes his manager never gave him actionable feedback and now Paul feels lost.