



# How to... conduct an effective performance review

## A GUIDE FOR MANAGERS

Performance reviews are an important part of any performance management process. They are a chance for managers and employees to take a step back from day-to-day tasks, assess progress and agree on next steps. They are like signposts on a journey that show employees where they are now and where they are going. Performance reviews should enable employees to understand whether they are meeting, exceeding or falling short against expectations. They provide direction and allow for an action-planning discussion about future priorities.

Get this process wrong and employees can become derailed, unclear about where they are heading or lacking the motivation to reach their next destination.

This guide is designed to help managers deliver positive and constructive performance reviews, ensuring they are meaningful and developmental for employees.

Detailed and careful preparation provides the best foundation for any review. For tips on how to prepare effectively for a review, take a look at our How to guide.

While performance reviews will differ depending on the performance management process and culture of your organisation and the needs of the employee, we've put together a list of general do's and don'ts to help you find the approach that works for you.

# Do



## TAILOR THE REVIEW TO THE EMPLOYEE

- Every employee is different so it's vital that your reviews reflect them as an individual.
- Make sure you find out before the review what areas they would like to concentrate on and what they want to talk about.
- Think about your employees' preferences – how they like to be managed, how they like to receive information and tailor your style and content appropriately.



## MORE LISTENING THAN TALKING

- A review should be focused on helping employees to maximise their performance – it is about getting them to take ownership of their development, not about you telling them what they should do.
- Your role is to stimulate the conversation, encouraging them to honestly assess what they do well and think about what they could do better.
- Give your employee the time and space to air their views and discuss their ambitions so together you can agree relevant objectives up to the date of the next review.
- Employees should feel completely involved in the process, an integral part, not a passive bystander.



## FOLLOW UP ON ACTIONS POINTS

- For reviews to be seen as valuable, employees need to see that they have an impact and make a difference to their working life.
- It is vital that you follow up on any action points from the previous review and let your employee know if they have not been resolved, what their status is. Follow up on any action points that the employee took from the last review.
- By following up your words with actions, it shows employees that these reviews are meaningful and their development is important to you and the organisation.



#### ASK FOR FEEDBACK ON YOU AS THEIR MANAGER

- Just as your employees appreciate knowing what they do well and what could be improved to enhance their development, the same type of information is invaluable to you as a manager.
- Inviting your employees to critique how well you are supporting them as their manager helps establish a transparent and honest relationship and shows that you are open and receptive to their views.



#### GIVE REVIEWS THE TIME THEY DESERVE

- Treat it as a priority in your diary and only move if it is absolutely necessary.
- If reviews are constantly moved, employees can easily get the impression that they and their development don't matter.

“The performance review is a critical moment in the year for the employee and their manager. It’s a chance for the manager to provide a rounded and constructive review of all-round performance. And it’s an opportunity for the employee to reflect on achievements and lessons learned as a foundation for future growth. Too often the performance review is a wasted opportunity. I thoroughly recommend following the simple steps in this guide to ensure this performance review is really effective, developmental and motivating.”



**Amira Kohler**

Director of Performance and Change at Appraisd

# Don't....

## X FEEL LIKE YOU NEED TO HAVE ALL THE ANSWERS

- If your employee is asking about something you don't know for certain, such as the latest strategic objectives for the business or training opportunities, don't bluff.
- It is not a sign of weakness to not have all the answers, be honest and say you will find out the correct information as soon as you can.

## X TRY AND DO EVERYTHING ON YOUR OWN

- Being a manager is a difficult job, especially if you are dealing with an issue you've never experienced before.
- Don't be afraid to ask for help from your manager, other managers or HR who can point you in the right direction.

## X HAVE A CLOSED MIND

- If an employee's progress against their objectives doesn't match your expectations, don't jump to conclusions.
- Explore the facts, listen to their explanation and work together to draw up an action plan on how to get back on track.

## X SHY AWAY FROM DIFFICULT SUBJECTS

- If there is a problem with your employee, it is unlikely to solve itself.
- Confrontation is uncomfortable for some people, so if you are unsure how to broach a difficult issue, ask a trusted colleague or HR for advice before the review.
- Take the time to think about the best way to address the issue and plan what you are going to say in advance.



#### LEAVE ANYTHING UNRESOLVED

- If you run out of time to cover everything, don't leave it.
- Arrange a quick follow-up with your employee to pick it up and make sure you cover everything you planned to in the review.



#### FORGET TO SAY THANK YOU

- Reviews are an excellent opportunity to highlight things the employee has done well.
- A few well-chosen genuine words of thanks can go a long way.

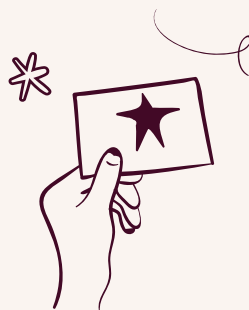
### And finally....



#### DON'T BE AFRAID TO ASK FOR PEOPLE MANAGEMENT TRAINING IF YOU NEED IT

- If you are uncertain about how to set SMART objectives or feel uncomfortable giving feedback, don't hope you'll figure out how to do them on your own.
- Ask your manager or HR for training to help you develop these skills to improve the effectiveness of your reviews.

If you would like help getting ready for your reviews, check out our [How to....prepare for a performance review guide](#).



If you are considering a new performance management system or looking to change your existing one, talk to one of our experts.

[Talk to an expert](#)