Best Practices for Performance Reviews

Description: It's that time of year again. Performance reviews are upon us, and without the proper preparation, even the best leaders can miss this valuable opportunity to make meaningful connections with their team members. In this episode of The Forward Thinking podcast, host Stephanie Barton, VP Marketing and Communications, FCCS is joined by Jeannie Clinkenbeard, Director and Senior Leadership Consultant, FCCS for a conversation about best practices for performance reviews.

Forward-thinking leaders know why performance reviews are important, how to maximize their effectiveness and how to use them to engage their employees. Their conversation is filled with best practices and advice to help ease the stress and provide a clear structure for upcoming performance reviews to make the process a little less painful and a lot more effective for everyone involved.

"Managers and leaders need to look at these as an opportunity to connect with your employees, to give them encouragement and put them on a path for success." — Stephanie Barton

"Every employee wants to know that what they do is relevant." — Jeannie Clinkenbeard

Episode Insights Include:

Why are performance reviews important and how have they changed?
+ Formal performance reviews press the pause button and provide an opportunity to reflect on the past year and look forward to the future.
+ Performance reviews provide an opportunity to celebrate what is working well and plan for what is coming next.
+ Over 50% of employees used to dread performance reviews, but that has changed with the transition away from numeric performance rankings.
+ A mid-year review can help reduce the stress of the annual performance review.
+ Performance reviews are an opportunity to connect with your employees, to give them encouragement and put them on a path for success.

Key elements of a successful performance review
+ Performance reviews should facilitate a positive, open conversation with the employee.
+ Review past performance, successes and alignment with the job description.
+ Consider the future — what is the plan moving forward?
+ Ask the employee about their development aspirations — what opportunities would they like?

How to prepare for a more effective evaluation
+ Proper preparation can make a great difference in how meaningful the exchange will be.
+ Set up a system that you can utilize throughout the year.
+ Create an Outlook folder for each team member to hold compliments and positive feedback throughout the year.
+ Send yourself emails about performance notes to include in the employee's folder.
+ Ask other team members for input and feedback about their experiences and interactions with the employee.

Considerations for the environment of a performance review
+ Select a location that is quiet and non-intimidating — consider a coffee shop or outdoors rather than your office or a conference room.
+ Consider the physical distance between you and your team member — a conference room is an unnecessarily large space for the review.
+ For virtual reviews, make sure both cameras are on and that you treat it with the same confidentiality and respect that you would any other review.

Questions for the leader to ask
+ What has this year been like for you?
+ How would you describe your experiences this year?
+ What projects have you been working on?
+ What goals did you meet this year that energized you?
+ Were there specific goals or behaviors that you found particularly challenging this year?
+ What professional aspirations do you have that I can be aware of?
+ What makes your heart sing in your work?
+ Are there life aspirations that you are working toward?

How to approach the difficult aspects of a performance review

+ Do *not* wait until a review to let a team member know that there is a gap in their performance.
+ Addressing a change or lack in behavior provides immediate opportunities for improvement.
+ It is unfair to the team member to not offer immediate feedback when it is needed.
+ If your employee has broken a policy or not corrected behavior after a clear conversation, HR or your manager will need to be involved.
+ Keep track of course correction with documentation of a specific plan.
+ Highlight the impact of negative or positive behavior to the team and the company culture.

Wrapping up a performance review in a positive way

+ Every employee wants to know that what they do is relevant.
+ Thank the team member for the specific ways that they contribute to the team.
+ Highlight the impact of the work that they do on the company.

Key things to avoid during a performance review

+ No surprises — keep the conversation going throughout the year.
+ Avoid the 'recency effect' — don't focus solely on what the employee has done in the last month or two.
+ Don't be afraid to ask questions about what has changed or what needs to change.

This podcast is powered by FCCS.

Resources
FCCS Leading Others Program

Get in touch
info@fccsconsulting.com