

# PERFORMANCE REVIEW TOOLKIT

tools, tips, templates, and more



# Performance Review Toolkit — tools, tips, templates, and more

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**Turn performance reviews from a dreaded task into a powerful tool. Employees and managers alike often dread performance review time, and we don't blame them. Most performance reviews are a chore and yield little benefit. But it doesn't have to be that way.**

**In this special report, we've collected the best of Business Management Daily's advice on performance review strategies, formats, tips, and methods for turning performance reviews into a valuable tool for improving employee performance . Whether you're a small business, Fortune 500 company, in-person, remote, or hybrid — we've got the insight you need.**

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# Simple guide to writing performance reviews

Your employee performance review process is key to ensuring both you and your employees are on the same page regarding job performance. That's why it's important to develop a clear and consistent process that includes how to write a performance review correctly. Otherwise, it can be an unnecessarily long process that you dread completing and doesn't provide the best quality feedback.

Below you'll find more details on performance reviews, best practices for writing them, and sample phrases you can plug in to complete the process quickly without sacrificing the level of feedback needed to be beneficial.

## The goal of a performance review

When writing a performance review you want to always keep in mind the ultimate goal of the process.

Whether you call it a performance review, performance appraisal, or performance evaluation, the purpose is to provide a formal assessment of employee job performance over a set period. You can choose to hold your reviews annually, quarterly, or even monthly, but many companies are moving to a frequency beyond annual reviews.

You evaluate their competencies and areas of improvement, then assist in setting realistic performance-related goals that will be evaluated during the following performance review.

During the performance review, you want to assess a range of skills including:

- Communication
- Collaboration
- Teamwork
- Problem-solving
- Accuracy of work

- Quality of work
- Reliability
- Punctuality
- Attendance
- The ability to meet deadlines
- The ability to accomplish selected goals

## **How to write review an effective performance review**

Writing a quality employee evaluation requires a process to achieve the best results. Here are some strategies to keep in mind.

### **Give specific examples**

Your performance review should provide specific examples when referencing employee performance. When you state that an employee performs in a certain manner — negative or positive — include specific examples that showcase exactly what you're referring to. This helps to ensure there's no confusion regarding what your feedback means.

These examples can include data, anecdotal notes, or anything else that clearly and specifically demonstrates why you're providing that performance rating.

### **Provide constructive feedback**

You don't want to focus strictly on the positive, even if the review is for a star employee. Your goal is to also identify areas of improvement through constructive feedback that can help take their performance even further.

If an employee is demonstrating problematic behaviors, ensure you're framing it in a way that isn't attacking their character or job performance as a whole. You want to be careful to ensure your feedback is constructive, not just a list of criticisms that likely won't be accepted well.

### **Set realistic goals**

Each performance evaluation should incorporate actionable and realistic goals for the employee to strive toward. It's important that these are strategically set being that they often impact the ability to earn a raise or receive a promotion. Also, these goals give them something to work toward that can improve their performance and impact the company as a whole.

You want to set a goal that will positively influence the trajectory of their career while also supporting the team and the organization.

When you set goals ensure you set a SMART goal that is specific, measurable, actionable, relevant, and time-based to ensure it's one that is clear and achievable.

### **End with positive feedback**

It's helpful to take a sandwich approach when writing a performance review. Start positive, sprinkle in constructive feedback, and end positive. Setting it up in this way sets the stage for a better conversation.

## **Performance review best practices**

Here are additional best practices to keep in mind as you prepare for performance reviews.

### **Follow-up with regular feedback**

Beyond your formal performance review, also incorporate providing informal feedback into your routine. This is especially important if you only offer an annual performance review formally.

### **Hold your meeting face to face**

This might not always be possible as more people are working from home, but you want to hold your performance review meetings either face to face or via Zoom as a second option. Try to avoid doing it over the phone or just sending the review via email and holding all communication that way.

## **Review their job description in advance**

In the day-to-day of managing your team, the job description of your employees can run together. Many employees take on tasks outside of their job description and are completing duties they're not technically being paid to do at their current position.

So, you want to review their job description in advance to ensure you're only evaluating them on their current position's responsibilities. In reviewing the description, consider how the employee is meeting requirements for the position and make notes of areas of achievement and areas of improvement.

However, this can also be an opportunity to update an employee's job description. If they've taken on more work, especially at their manager's request, that isn't reflected in their job description, then it should be updated to reflect their expectations.

## **Performance review example phrases**

You can use these performance review example phrases as templates when writing employee performance reviews. Feel free to update them to reflect comments that are specific to your employees.

### **Performance review phrases for areas of achievement**

- Improved production on sales goal identified at the beginning of the performance review period.
- Exceeded production expectations on communication goal identified at the beginning of the review period.
- Takes initiative to gather tools and resources needed to complete projects ahead of time with quality that's beyond expectations.
- Sets measurable goals and continually strives to reach or surpass them.
- Consistently struggles to achieve similar results as co-workers in relation to sales performance.
- Sets realistic and actionable goals and continuously strives to achieve them.

- Improved sales performance by 52%.
- Made an effective system to streamline the outbound sales work processes by identifying holes in the current system.

### **Performance review phrases for attendance**

- Consistently arrives on time for meetings and conferences.
- Regularly attends non-mandatory training and meetings.
- Has not met goals identified for the new performance review period for arriving on time to work and to meetings.
- Completes deadlines in a timely manner.
- Respects the time of others by arriving at team meetings on time.
- Exceeds expectations in arriving on time for work, including meetings and conferences.
- Has good attendance and doesn't violate the standard attendance policy.
- Begins each day fully refreshed and prepared for any challenges.

### **Performance review phrases for productivity**

- Has greatly improved on hitting production goals on (x) since last review.
- Has not displayed consistent productivity improvement since last appraisal.
- Exceeds output expectations set out for his/her department.
- Makes a large contribution to the overall success of his/her department through excellent productivity.
- Consistently falls below others on the team regarding work output.
- Positively contributes to the overall performance of the company through consistent and high-quality work.
- Continuously strives to improve profits, productivity, and performance targets.
- Shows strong time-management and organizational skills.

### **Performance review phrases for communication skills**

- Displays improved listening skills in meetings with colleagues and managers.
- Excels at communicating project expectations to those he/she manages.

- Needs to work on fully understanding a situation before making defensive explanations.
- Effectively communicates with team members on projects and delegates when necessary.
- Builds company morale and cooperation through effective group facilitation.
- Effectively communicates with colleagues, supervisors, partners, and customers.
- Clearly communicates ideas and thoughts in team meetings and conferences.
- Is a constructive communicator and is capable of discussing difficult issues effectively and to the point.

#### **Performance review phrases for drive**

- Shows curiosity for new ways to thinking and communicating to improve projects and customer satisfaction.
- Continually pushes for more responsibility and shows willingness to put in extra hours.
- Is continuously striving to improve skills and production.
- Lacks the initiative to willingly take on more complicated tasks or projects.
- Tends to wait for projects to be handed to him/her rather than requesting more responsibility.

#### **Performance review phrases for leadership**

- Needs to work on talking to employees on their level without being condescending.
- His/her team often comments on how he/she makes them feel comfortable in voicing opinions and ideas.
- Clearly understands strengths of team members and delegates accordingly.
- Displays a strong work ethic that effectively motivates team members to excel.

- Promotes a culture of learning and understand that team members respond well to.

### **Performance review phrases for creativity**

- Appears to be hesitant when it comes to taking creative risks that are outside the box.
- Has a vision for the future of the company and applies creative ideas to help implement it.
- Always contributes fresh ideas at team meetings and on projects.
- Fails to reward those under his/her management for innovative ideas or suggestions.
- Strives to always take new information into account and adjust plans accordingly.
- Applies creative thinking to implement a vision for the company.
- Continuously suggests new ideas in meetings and on projects.
- Shows initiative with developing new ways of thinking to improve projects or company performance.

### **Performance review phrases for cooperation**

- Effectively collaborates with other team members to get projects finished efficiently.
- Shows improvement delegating tasks to others when overwhelmed.
- Excels at sharing knowledge and tips with new team members to help them become part of the team.
- Could work on helping team members complete tasks for overall success of project.
- Has a tendency to make others feel hesitant asking him/her for help as they do not know the reaction they will get.
- Displays a cooperative spirit by performing xx task to contribute to xx project.
- Promotes cooperation well to ensure colleagues work as a team to meet deadlines.

### **Performance review phrases for interpersonal skills**

- Works effectively within a team environment to achieve specific tasks or projects.
- Develops constructive working relationships with internal and external stakeholders.
- Is an effective team player as demonstrated by their willingness to help out and contribute as required.

### **Performance review phrases for areas of improvement**

- Struggles to effectively overcome new challenges and find solutions to new issues.
- Should work on developing and maintaining professional relationships.
- Tends to focus more on what can't be done instead of what can be done.

### **Performance review phrases for accountability**

- Takes ownership in the company's success and accepts responsibility for oneself and contribution as a team member.
- Admits mistakes and errors and informs others when unable to keep a commitment.

### **Performance review phrases for flexibility**

- Shows ability to come up with new solutions for problems when old ways of thinking are ineffective.
- Tends to shut down instead of finding new ways of working when expectations are not met.
- Displays improvement in taking on new tasks or changing workflow when situation requires.
- Rigidly sticks to traditional methods of project management even when results do not warrant it.
- Consistently uses constructive criticism to improve his/her skills and work processes.

## Performance review phrases for problem-solving

- Has displayed capability to solve complex problems independently, but tends to defer to others on the team.
- Shows creativity and initiative when tackling complicated problems.
- Tends to make excuses and blame others on team when problems arise instead of working to solve them.
- Recognizes problems when they are at early stages and implements solutions proactively.
- Empowers those he/she manages to solve problems on their own.
- Displays the capability to independently solve complex problems.
- Breaks a problem down before analyzing it in a more detailed manner.
- Knows how to collaborate with others effectively to find solutions to problems.

## 7 tips for more effective written performance reviews

Performance reviews generally do not rank high on a list of favorite activities. When done thoughtfully, however, they offer valuable information about where a worker currently stands and what actions could yield improvement in the future. Even more challenging, however, is creating an effective written review. While a performance review conversation is valuable, a written record is needed for later reference.

Give the reader of the review a clear, accurate account of his performance by considering the following seven things when filling out the document.

### 1. Base the appraisal on the *entire* evaluation period

A mid-year review should cover the past six months, not just the past six days. Throughout the appraisal timeframe, jot regular notes to yourself about employee performance. Referring back to these notes helps eliminate recency bias — the tendency to focus on the most current actions. Likewise, you'll avoid falling for the

“Santa Claus trap.” This happens when employees are on their best behavior right before performance reviews, potentially skewing your perception.

**Example:** You need to evaluate John on his ability to be a team player.

Don’t immediately assume that he’s good in this area because you remember him helping out a colleague last week. To write an effective written review, look back in your notes. You may recall that last month he took too much credit for landing a new account and hurt the morale of co-workers. That needs mentioning too.

## **2. Make corrective feedback easily visible**

Sensitive to how an employee will take criticism, a manager may try to deliver a message as “nicely” as possible. Sugarcoating with positive language, however, runs the risk of the problem never coming to the worker’s attention.

Subsequently, you cannot expect the person to change his actions if not given clear notice that a problem exists and guidance on how to rectify it.

**Example:** You’re not happy that Mary rarely follows directions and insists on carrying things out her own way.

Don’t try to spare her feelings by saying something such as “Mary takes a creative and innovative approach to performing her job.” This statement not only gives a positive impression, but it also fails to deliver the specific feedback she needs in order to improve. Try something unemotional but direct like “The company has specific operating procedures vital to the overall good. Mary needs to follow these instructions. If she does not understand them or has suggestions for improvement, she should consult management.”

## **3. Stick to job-related comments**

A performance review evaluates how well someone meets the expectations of the job for which she was hired. An effective written review should stick to these points. It should not turn into a chance for a manager to play amateur

psychologist or to berate a worker's personality traits. The receiver of this type of feedback may view you as invasive and overstepping your bounds.

**Example:** Tom shows up late on a regular basis and often seems distracted. You're betting that he's depressed because of his recent divorce.

Don't mention his personal life in the evaluation or recommend that he seek professional help. Rather, provide an honest rating with supporting justification as it pertains to his job. "Tom was late seven times over the last five weeks. He also missed two important deadlines during this appraisal period."

#### **4. Give enough emphasis to good performance**

A manager certainly wants the worker being appraised to walk away knowing what to improve upon moving forward. However, leaders who spotlight problems while ignoring strengths run the risk of looking like they're picking on someone. A deflated worker who deems his boss "impossible to please" has little motivation to institute changes discussed. Besides the morale boost that comes from receiving praise, people need to hear specifics about what they're doing right so that they can keep repeating those desirable actions.

**Example:** Joan worked very hard to master the office's new computer system.

Don't forget to mention this achievement! Yes, she still may need to become more detail-oriented and speed up her completion of weekly reports. You should draw attention to these. But offering praise for what she accomplished demonstrates that you notice both the good and the bad. It instills confidence that she can do well and that her effort will be recognized.

#### **5. An effective written performance review doesn't use fuzzy language**

Abstract words that do not pinpoint actions or behavior do little to help an employee understand what she does well or what she must improve upon. This is especially true in writing, where an employee may be unable to ask for clarification. What, for instance, constitutes a "bad attitude"? It could mean

someone complains too much or doesn't get along with colleagues or doesn't pitch in to help others or is too critical of co-workers, or a multitude of other things. To craft an effective written performance review, write your comments in ways that illustrate your thoughts clearly rather than leave them open to interpretation.

**Example:** Team members have complained that Darlene focuses only on herself and is not very friendly.

Don't say "Darlene needs to improve her interpersonal relationships." Rather, try something like "Darlene does an excellent job of staying on task and producing accurate reports. She consistently makes deadlines and achieves objectives. Darlene could improve her working relationships by learning more about her colleagues and the work that they do. This will improve her ability to recognize opportunities for collaboration and help to create a sense of teamwork."

## **6. Make certain the words and ratings match**

Performance evaluations frequently consist of both statements and numbers. Together, they provide information that the individual worker can use to see how well he meets company expectations. Additionally, the organization can use this information when deciding things like raises and promotions. However, written feedback and scores that do not support each other leave all readers confused.

**Example:** Jane receives an appraisal containing many compliments and no complaints, but her boss lists her overall rating as a 3 (satisfactory) on a scale of 5.

Don't take the easy way out and simply give all employees an OK rating. High performers will get discouraged. Low performers will walk away with a higher opinion of themselves than they should. In this case, if you truly think Jane deserves a 3, align your statements with words such as "adequate" or "sufficient" rather than "outstanding" or "great."

## **7. An effective written review should be accompanied by a discussion**

Lastly, for performance reviews to be worth their time. Treat them as more than “bureaucratic nonsense.” Given the right attitude and attention, they can serve as wonderful springboards to employees truly examining their role and how they can do it better.

**Example:** The office’s administrative assistant puts sealed appraisal reviews in each person’s box along with the Friday mail.

Don’t hand out an employee evaluation like it’s just another piece of paper. Likewise, don’t distribute it in a manner that suggests you’re hoping people will just read them and leave you alone. Rather, set up a time to go over the review. The reader may interpret written words and ratings differently than you intended. Talking together can prevent misunderstandings or hurt feelings. The conversation also allows you to personally encourage a positive future and together create actionable steps to achieve it.

## **How to identify and reduce performance review bias**

Performance review bias is tricky to identify and tricky to resolve. Bias is part of the human experience, we all have biases within us based on our personal beliefs and experiences. However, when you hold a position of authority, your bias can have a significant impact on the career path of those you evaluate. Therefore, no matter how common it is, bias is not acceptable within the workplace. Especially when giving performance reviews.

That's where acknowledging and reducing performance review bias comes into place. It's something that might be inherently present. However, it is your responsibility to ensure that those tasked with reviewing others' performance reduce their bias to the greatest degree possible.

### **What is performance review bias?**

It's first essential to understand what bias is. A bias is a prejudice that's in favor of or against someone or something.

The bias could be something we typically think of, such as gender, religion, ethnic background, socioeconomic history, the list goes on and on. On the other hand, the bias could be based on how you evaluate others in general. For example, you may be more lenient or straddle the fence with your assessments.

When bias comes into play during performance evaluations, it makes it nearly impossible to accurately measure employees' performance. This makes it even harder to have fair evaluations across the board.

## **Examples of performance review bias**

There are endless ways to showcase bias when giving performance reviews. Here are some of the most common performance review biases seen within the workplace.

### **Gender Bias**

A common gender bias involves providing feedback that focuses on women's personality traits (ex. She works well with her colleagues). On the other hand, feedback for men might focus more on their accomplishments (ex. He would benefit from professional development to hone his skills). When reviews of men focus on more valuable skills than those of women, it can lead to a more significant pay gap and unequal promotion opportunities within the organization.

### **Primacy Bias**

When exhibiting primacy bias, evaluators will focus more on what they learned about the employee during the beginning phases of their professional relationship. They focus less on the relationship's totality. For example, if you have an initial negative impression, you will tend to be more rigid during the performance evaluation.

### **Recency Bias**

Recency bias occurs when an evaluator judges primarily based on the events that took place most recently, instead of the period in its totality. This is the opposite

of the primacy bias because the primary acts that will impact the performance review are the most recent things to have taken place. A good or bad recent few months may overshadow the performance for the rest of the year.

### **Centrality Bias**

One bias that might not be as obvious is one of centrality. This happens when one remains fairly neutral during evaluations. For example, an evaluator might give most people an average rating in all categories without making a distinction with either higher or lower ratings. Taking this stand can fail to provide a real understanding of the employee's performance.

### **Halo/Horns Effect Bias**

This bias leads to one personality trait overshadowing other traits in a way that doesn't allow for an accurate evaluation of the employee. For example, suppose one has a gift for gab and is well-liked in the office but often misses deadlines and submits subpar work. In that case, their personality could overshadow their shortcoming. The resulting performance review will lack the documentation that notes the improvements needed.

### **Leniency Bias**

Leniency bias is essentially the opposite of centrality bias. In this case, performance reviews tend to be skewed more positively due to the manager giving higher marks across the board, even if all don't deserve them. In doing so, there's no way to differentiate between those who are truly performing better than others.

## **How to avoid performance review bias**

Avoiding performance review bias requires you to first acknowledge that bias is present. Then you need to establish a consistent and structured process for performance reviews. Here are some strategies to consider implementing.

### **Develop an evaluation rubric**

A well-written rubric will offer clarity regarding the specific points being evaluated during a performance review. This starts by defining the criteria used to assess the employee and then using evidence to assess the score. This method is better than providing open-ended questions without much guidance surrounding how to answer. When there isn't structure to what's being judged and how to evaluate, it's easier for biases to showcase themselves.

### **Provide more specific prompts**

Generic prompts don't allow for consistency within evaluations. Some managers will give a brief one-sentence reflection while others will write a paragraph. This doesn't allow for an accurate depiction of employee performance across the board. Also, this lack of structure is the perfect breeding ground for bias to slip in. Instead of stating, "How does the employee's performance match the company's quarterly performance expectations?" You can add more structure by requiring that the evaluator include three measurable outcomes for the employee that demonstrate how their performance meets the quarterly company expectations.

### **Review evaluations regularly**

To identify and reduce performance review bias, review evaluations regularly to ensure they meet the organization's expectations. Though evaluations are very person-centric, you can use them to determine patterns of bias.

For example, if an employee has a glowing review yet fails to hit their marks, or an employee is shining in all areas yet has a substandard performance review, you can investigate whether bias has occurred. Another way to look at data is whether the men tend to have a specific trend for their reviews while the women have another. This data can highlight areas of bias to address and ultimately reduce throughout the company.

### **Provide additional guidance on performance reviews**

When you identify managers who are continuing to display bias in performance evaluations, consider how you can better support them in reducing their bias. If

they fail to showcase an improvement, consider what other steps might need to be taken. Also, be sure employees know what to do if they feel bias is happening with their performance reviews. The company should have a place for employees to turn to have this conversation without fear of negative repercussions.

## **How to get the most out of a 90-day performance review**

You finally found the right candidate to fill a role within your organization, but the work isn't over. As you know, an employee's initial experiences with a company will significantly impact their future with it. With that in mind, there are specific steps you can implement to provide support and a positive experience — one being the 90-day performance review.

Companies without a strong onboarding process are at risk of losing skilled employees early on. High rates of turnover and disengagement are costly and harm productivity. However, many companies have little structure when it comes to onboarding.

Don't let your new hires fall through the cracks during the onboarding process. You can implement a structure for a 90-day performance review that improves productivity, average tenure, employee relationships, and more. The best part? It's simple to do.

### **What is a 90-day performance review?**

During a 90-day performance review, the manager reviews the employee's performance during their first 90 days on the job. This includes how they've progressed toward their goals, feedback on their performance, additional support needed, and a plan for development as they move forward in the company.

At the end of the performance review, the employee should feel clear about how they can achieve the greatest level of success in their role, and the manager

should feel confident that the employee has the proper support in place or will soon.

## **Why 90 days is the perfect time for a check-in**

There's a reason why the 90-day performance review is standard managerial practice. It is beneficial for the new hire and the manager, and the company as a whole.

### **Here are some specific benefits of a 90-day performance review.**

- **Have an open dialogue.** This sets the stage for open communication between the employee and the manager early on. During this time, it should become clear that asking questions, voicing concerns, discussing expectations, and the like is part of the company culture. The conversation will set an example for how communication should continue moving forward.
- **Provide early feedback.** Instead of waiting for a mid-year or annual review, new hires are clear about their performance within the first 90 days. There's power that comes in this clarity from the employee perspective and the manager perspective. It allows employees to correct their actions early before a small hiccup becomes a long-term problem.
- **Determine the best fit.** Sometimes, the first 90 days will determine whether the new hire will be a good fit for the position moving forward. It's better to "hire slow, fire fast," as the saying goes, and 90 days might be enough time to make some determinations. You can decide early on whether it's time to move on or put them on a strict development plan to see if the employee can make improvements.
- **Improve performance.** This is beneficial for the employee, manager, and company alike. This creates clarity around things that are going well, areas the new hire can improve on, and overall open dialogue related to the position, team, supports, and the like. Ultimately, that can lead to better performance from the new hire. This, in turn, yields improved results for the manager and the company as a whole.

## **How to get the most value out of a 90-day performance review**

The best way to optimize the value you get from a performance review is to have a plan in place, and your plan starts from their first day on the job.

### **Schedule the meeting on day one**

Put the performance review on your calendar on day one and be transparent about what's to come in 90 days during the performance review meeting.

### **Develop an agenda**

You don't want to fly by the seat of your pants just to check it off your to-do list. Have a clear agenda to cover the conversation's essential points and ensure you both leave feeling like it was a valuable conversation.

### **Have a dialogue**

Speaking of conversation, keep in mind that the performance review is not a time for you to be a talking head. Instead, it should be an open dialogue in which you and the new hire can speak about the role, the company, and their performance up to this point

### **Prepare data and feedback**

Look at the employee's performance, their role in the company, data related to their goals, and both qualitative and quantitative results of their performance so far. Be prepared with specific feedback and the ability to have an open dialogue regarding it.

### **Create a development plan**

At the end of the performance review, you want to develop a new hire plan that will benefit their development with the company. This might include additional training, professional development, tools, support, or anything else that you feel will help them as they move forward in their position into the next 90 days and beyond.

When you approach a 90-day performance review with these points in mind, it's easier for you to achieve the desired results.

## **Questions to ask during a performance review**

Here are some insightful questions you can ask a new hire during their performance review.

### **How would you evaluate your performance so far?**

Their response will tell you how they believe they're performing in this role. You may also get insights into any challenges they're having, letting you address them early.

### **What skills do you want to develop so you can perform better in your role?**

Their response will tell you how you can provide additional support through professional development, additional training, or mentorship if the skills they mention are relevant to their success in the position.

### **What tools do you need to perform better in your role?**

Their response will tell you any useful tools or resources you can make available to support their success.

### **Do you feel comfortable with your team?**

Their response will let you know if there are any collaboration issues amongst team members that need to be addressed. Doing so early in their career with the company can make for a much smoother future. Someone not yet comfortable with their team might benefit from some structured networking opportunities.

### **Is the role/company meeting your expectations?**

Their response will let you know whether the job, company, and overall experience are what they expected to improve job satisfaction. As much as you

want your new hire to meet your expectations, it's also essential that the company meets theirs. If not, find out why.

### **How do you see yourself in the company in the long term?**

Knowing your new hire's long-term career goals will help you provide them with the support they need to hit those goals moving forward.

## **How to conduct an effective mid-year performance review**

As summer approaches, it's time to start scheduling and preparing for mid-year performance reviews. Regular performance reviews are an integral part of a strong overall performance management system. While many employers think of performance reviews as solely an end-of-year activity, it's a good idea to schedule a mid-year review to discuss each team member's job performance and check in on their progress toward their goals for the year.

Having a mid-year check-in can help you and your staff identify any issues and turn things around for the remainder of the year. Ideally, holding mid-year reviews will lead to more positive year-end reviews and more transparency around employee performance. Here is what you need to know about conducting mid-year performance reviews.

### **Mid-year vs. end-of-year reviews**

A mid-year performance review is a lot like an annual performance review and they are conducted in a similar fashion. Both reviews are typically scheduled one-on-one meetings between a manager and their direct report. Though sometimes additional parties are involved in the end-of-year review if changes in compensation require higher-level approval or if you use a 360-degree review method with peer feedback.

The key difference is that the majority of the annual goal-setting and annual raise discussions will be occurring during the main year-end performance review. This

means that the mid-year reviews are typically treated more like progress check-ins than full performance evaluations. Most employers will review annual goals and make adjustments or small additions as needed during mid-year reviews, but employees typically don't receive a full set of new goals during these meetings.

Some employers still use a formal performance review template to document mid-year reviews while others treat them as more informal performance conversations. Consider the goals of your review and the culture of your company to determine what the best approach is for your team. If you offer quarterly bonuses or mid-year raises, taking a more formal approach to mid-year reviews is fine. However, if you can't offer any extra compensation based on good performance it's probably best to treat the mid-year review as a progress report rather than a final report card.

### **How to prepare for mid-year reviews**

Go into mid-year reviews with a clear idea of what you hope to achieve with them. It can help to start compiling and reviewing any relevant documents such as records of prior performance reviews, the list of annual goals set for the year, the employee's job description, and any learning and development records. It is a good idea to review these documents and jot down some review questions that you want to ask during the meeting. While most employers have a standard set of review questions, it is helpful to also include some personalized questions based on the employee's past performance and job duties. For example, if they recently were given new job responsibilities or there was an area that they needed to improve in after their last performance appraisal the mid-year review is a good time to check in on these things.

Since employees are sometimes hesitant to bring up concerns due to the anxiety that comes with performance reviews, it can help to have employees complete a self-assessment before the review. This gives managers some advanced insight into areas that employees may need help in or concerns that they can follow up on during the actual review meeting to gather more information. You'll often get

better feedback in a short survey or assessment than you would by putting them on the spot during the meeting.

## **How to conduct mid-year performance reviews**

Here are the key components of the mid-year performance review process. It's also important to remember that it is a two-way conversation, so leave plenty of time on the agenda for employees to ask their own questions or bring up issues that they are experiencing. Each review may go slightly differently depending on what the employee wants to discuss.

### **Check in on their progress toward annual goals**

Most employers work with employees to set goals for each year (or quarter). If you're not already doing this as a part of your performance management practices, it's a good idea to start. During the mid-year review, one of the focal points of the discussion should be how the employee is doing in meeting their objectives for the year.

If they are not hitting their monthly targets or making adequate progress towards bigger goals, explore the reasons for this. Allow the employee to share their perspective on the issue and work together to come up with a plan to improve.

### **Make adjustments to their goals**

One great thing about conducting a mid-year review is that it gives both the manager and the employee an opportunity to adjust the annual performance goals if priorities have changed or the employee is having difficulty hitting their targets.

Sometimes as you discuss the employee's progress, you may find that there isn't a way to help them achieve their goal. Perhaps the goal that was initially set was too ambitious. Other changes may occur that could also prevent them from achieving their set goals. If their department experienced budget cuts or staffing changes, goals may need to be adjusted to account for decreases in spending or changes in how the employee is able to allocate their time.

Be open to making adjustments so that employees feel that they have reasonable goals. Setting some stretch goals is fine, but overall you should be setting metrics that employees can reasonably achieve without putting in extra hours or neglecting their other work tasks.

### **Ask what they need from you**

While performance review meetings are typically focused on the employees' performance, it's also a great time to check in on your own performance as a manager. Discuss how you could better support their success during the remainder of the year. You can ask them what you or the organization can do to help them achieve their goals.

It can also be helpful to ask if there are any specific tools or resources that they feel would improve their productivity and work performance. This is particularly important for small businesses or start-ups that may not yet have all of the popular software tools available for their employees. An employee may find that they are spending a lot of time on a particular task that could be simplified or automated with a specific tool such as a CRM, applicant tracking system, or social media management solution.

Often as a manager you may not initially realize when your team has outgrown the current way of doing things, so it's vital that you give them an opportunity to ask for what they need. Often these discussions will come up during the year-end reviews when goals are created. However, smaller businesses can experience significant growth or change in a 6 month period, necessitating more frequent discussions. Employees may also not realize what tools or managerial support they truly need until they actually dive into new projects or goals, so you may get clearer answers during the mid-year review.

### **Check in on employee satisfaction**

In addition to performance management, mid-year reviews are also a great tool for improving employee engagement and retention. In addition to checking in on the employees' personal performance, you should also check in about how they

are feeling about their work. It's also good to check in on professional development and advancement goals so that employees know what growth opportunities they can work towards internally rather than looking elsewhere for new opportunities.

Some questions that you can use to gauge employee satisfaction and retention include:

- What do you like most about your job?
- What do you like least about your job?
- How do you feel about your current workload?
- What's one thing you would change, if possible, to make your day-to-day work run smoother?
- What are your professional growth and advancement goals?

You can also inquire about any changes that have been made recently. Since annual performance reviews are often done at the end of the year or very beginning of the year, any new policies or organizational changes for the year may not have gone into effect until after the annual performance review. The mid-year review is a good time to check in on morale and how employees may be feeling about any changes that you made within the company.

### **Follow up after the review**

You shouldn't wait until the end of the year review to follow up on the topics discussed during the mid-year review. Be sure to follow up on any action items from the review meeting promptly. Followups may include providing them with requested tools or professional development resources. It may also include acting on the feedback received by communicating more actively or incorporating their feedback into your management approach. It's important to show employees that you are listening to them and acting on their feedback.

### **Why you need to conduct mid-year reviews**

Having regular conversations throughout the year regarding employee performance can help improve employee engagement and work quality. A mid-year performance review is a great way to keep track of employees' progress towards their yearly performance metrics and to catch any issues as they arise.

In light of the current labor market, a mid-year review is also an important retention strategy. Mid-year reviews are an opportunity for employees to ask for help, provide you with constructive feedback, address concerns, and discuss their professional growth. As an employer, that gives you an opportunity to promptly address issues that may be leading to disengagement or frustration before they turn into big enough issues to cause the employee to look for a new job. Don't skip out on your mid-year reviews. They're good for the company and the staff.

## **A practical guide to 360-degree performance reviews**

Proving employee performance can take several forms and will vary depending on the organization.

Private, face-to-face performance reviews, also known as performance appraisals, have been the standard for reviewing how well an employee is performing their job responsibilities since the dawn of time. But, they have their downfalls and sometimes offer a limited view of an employee's actual contributions.

On the contrary, a 360 Performance Review seeks to make the process more inclusive. The employee is reviewed by other employees who they work with and around. We'll explain what a 360 Performance Review is, how it works, the pros and cons, and how to conduct one with your team members.

### **What is a 360 performance review?**

A 360 Performance Review is an employee assessment process used to obtain in-depth and comprehensive feedback about an employee's performance, behavior, and contributions to the company.

You may solicit feedback from the employee's team members, managers, direct reports, and customers. The employee may also be asked to assess their own performance. The idea is that by seeking feedback from people who have varying relationships with the employee instead of just their direct manager, you can gather a 360-degree understanding of their performance. In doing so, the employee, and the immediate supervisor, will understand how their performance is viewed as a whole.

Each person who completes the performance review will answer the same questions to maintain cohesion and consistency throughout the process.

Also, a 360 performance review focuses less on the work the employee accomplished and more on how the employee's presence impacted the work of others within the organization.

These reviews are often used in the promotion and compensation decision-making process to determine who is the best overall candidate for promotion or whether they deserve a compensation increase.

### **What's the goal of receiving 360-degree feedback?**

Using a 360 Performance Review aims to identify the contributions the employee makes to the company as a whole while offering a balanced look at the employee.

#### **The valuable skills it takes into consideration include:**

- Leadership
- Teamwork
- Interpersonal skills
- Interaction
- Management
- Contribution
- Work habits
- Accountability
- Vision

## **What's the difference between performance feedback and 360-degree feedback?**

While both performance feedback and 360 performance feedback are similar in that they provide feedback on an employee's performance, they're vastly different in several ways.

### **Who provides feedback**

**Performance review:** During a traditional performance review, the manager evaluates the employees' performance, providing a more narrow view of their performance.

**360 performance review:** During 360 evaluations, the employee's performance is evaluated by their manager, co-workers, clients/customers, and other relevant company members to provide a more comprehensive view of their performance.

### **Anonymity**

**Performance Review:** The employee's manager often conducts the performance review, so there's no anonymity regarding who is providing feedback. If the employee has follow-up questions or contests information on the performance review, they can directly speak to who provided the feedback.

**360 Performance Review:** While the 360 performance review doesn't have to be anonymous, it often doesn't allow the employee to seek follow-up information or contest feedback provided by those selected to be performance raters.

### **Overall Purpose**

**Performance review:** The typical performance review is often done to determine whether an employee has achieved a certain level of success or is due for a promotion or raise within their current position. Managers will look at the data to determine whether the employee achieved the goals.

**360 performance review:** The 360 performance review, on the other hand, is based on the idea of understanding how the employee is contributing to the company as a whole and the skills they have and could benefit from improving.

### **How a 360 performance review works**

A 360 performance review works by measuring employee performance. It aims to identify behaviors and skills such as work ethic, attitude, and efficiency. Here are the general steps you can expect to take when conducting one for your employees.

#### **Establish criteria**

You want to start the review process by determining what criteria you'll use to rate your employees. Keep in mind that you should primarily focus on understanding soft skills rather than their performance as most traditional performance reviews do.

#### **Select assessors**

Next, you should identify those who will assess the employees. You want to include a range of individuals to get the best understanding of performance from all angles. Consider asking their direct reports, team members, customers, managers, and other relevant employees. You can even have clients or customers provide their input.

#### **Collect feedback**

Next, it's time for the assessors to provide their feedback. Choose whether or not to keep the responses anonymous or not. Doing so may encourage assessors to be more open. However, it's also harder to follow up with more questions later. Regardless, be sure to give them enough time to do so thoroughly and accurately, so you should provide a minimum of a week's notice.

Once you receive all feedback, you want to set aside time to review all information and make a note of patterns and positive and constructive feedback to share during the evaluation meeting.

### **Hold the 360 evaluation meeting**

During the evaluation meeting, you want to share the results found by the 360 performance review so there's complete transparency across the board. Be sure to highlight both the employee's strengths and weaknesses.

You also want to determine goals to improve employee performance and employee engagement moving forward. Set follow-up meetings to discuss and check in on these improvement areas in the future.

### **Pros of a 360 performance review**

When you conduct a 360-degree performance review for your employees, you'll experience several benefits that will serve your employees and the company as a whole.

#### **Receive more comprehensive feedback**

Instead of relying on one person's input to communicate how an employee performs, the 360-degree feedback provides a broader, more inclusive view of employee performance. Receiving feedback from co-workers, managers, company officials, and even clients gives you a more realistic view of employee performance.

#### **Provide opportunities to improve employee relationships**

Since this type of performance review allows you to see how others view employee performance within the organization, it provides an opportunity to improve employee relations and teamwork. Team members who can give constructive criticism and accolades to others on their team will allow for better relationships as communication opens up. Also, in looking at the reviews, you can

identify where there are weak areas in how team members see each other, which could impact the company's overall performance.

### **Improve accountability**

Along the same lines of the previous point, when employees receive feedback from others in the company aside from their manager, they can better see how their performance impacts others which improves accountability.

### **Identify training needs**

You can use the information gained from the 360 performance review to identify areas of need related to employee development for individual employees and the company as a whole. If you recognize that a particular employee can benefit from added skills in an area, you can provide that. However, if you notice a trend that impacts many, you can address that on a larger scale.

### **Avoid unconscious bias**

Assessing an employee's performance based on multiple sources helps avoid unconscious bias and levels the playing field.

## **Cons of a 360 performance review**

While 360 performance reviews have vast benefits, they also have drawbacks. Here are some of the cons of 360 reviews to keep in mind.

### **Assessors can skew results**

Inexperienced or unreliable evaluations can skew the data, leading to unexpected negative results for the employee being assessed. Some assessors can be inclined to share more positive information about an employee who isn't performing well and vice versa. That's why it's crucial to select the right people to serve as assessors and to ensure they know what to look for when providing their feedback on the performance review.

## **Anonymous rating doesn't allow for follow up**

If assessors act anonymously during the 360 performance review, employees can't seek additional information regarding their views or comments. Similarly, they can't ask for further or contest feedback if there was a blatant negative review of their job performance.

## **The process can require more effort**

While valuable, you can expect to put more effort into conducting a 360 Performance Review than a traditional performance review. A 360 review is more effective and impactful than a normal performance review when done correctly.

You need the right people conducting the review, the right system for collecting and analyzing the data, and a suitable method for delivering the feedback to the employee at the end.

## **Sample 360 performance review questions to ask**

The success of your 360 performance review is mainly dependent on asking the right questions. You can ask both open-ended questions and close-ended questions to secure qualitative and quantitative insight into employee performance.

You have freedom in selecting questions depending on the areas you want to receive information on. Suppose you're focusing heavily on one area, such as leadership. In that case, you can ask extra leadership questions or spread them out evenly based on your areas of focus, including leadership, time management, productivity, collaboration, etc...

Create questions that are clear, detailed, and have a specific goal. This will assure assessors can accurately respond and provide quality information.

## **Sample close-ended 360-degree review questions**

- Does this person exhibit strong leadership skills?

- Does this person prioritize teamwork?
- Is this person open to receiving negative feedback?
- Does this person embody the company's core values?
- Does this person communicate clearly and effectively with team members?

### **Sample open-ended 360-degree review questions**

- What interpersonal skills do you see the employee regularly use when working with you, team members, and clients?
- Are there any interpersonal skills the employee lacks and should work to improve?
- Do you believe the employee shows motivation and drive to complete their tasks effectively?
- How well does the employee adapt to changing priorities?
- What's an area you'd like to see the employee improve?
- What would you see as their core competencies?

### **Best practices for 360 performance review assessments**

When you choose to implement 360 performance reviews, prepare to gather invaluable information to help your employees improve overall. This benefits not only the employee's career, but the company as a whole.

**Here are some final best practices to consider as you embark upon this feedback process:**

- You should first formulate a cohesive and consistent plan for rating each employee — completing this leg work before the process begins is imperative. Consider bringing in someone skilled in this area of work to help you get started.
- Choose the skills that are most relevant to your company and base your survey questions on those components. You'll find that 360 Performance Reviews are not one size fits all, so you don't want to rely solely on a cookie-cutter questionnaire template since it won't give you the quality results you're seeking.

- Decide who will conduct the assessments and be sure they're qualified and well trained to provide the needed level of feedback. The employees' most immediate supervisor, team members, and subordinates should be chosen to participate. In some cases, feedback can be requested directly from the employee.

## **How to conduct performance reviews and one-on-ones for remote workers**

As so many businesses transition to remote work arrangements, many managers now find themselves tasked with how to lead employees from afar for the first time. Whether you're having ongoing one-on-one calls with employees to simply stay connected to what they're doing, or you're [delivering critical conversations](#) like performance reviews, these simple tips can help you get the most out of virtual meetings.

### **1. Let employees know that you'd like to see them**

Sensitive conversations like performance reviews are far more streamlined when you can see the employee's facial expressions and reactions--even if the review is positive. Schedule at least one hour to have your performance review conversation, and let employees know that the review will be the dedicated focus of the meeting.

Give your employee several days of advance notice that you'd like to have the conversation using live video tools so he can prepare for a private and professional exchange while working from home, particularly now that so many employees are tasked with juggling homeschooling and their job. If your company doesn't use tools that easily support video or those you do use tend to freeze, delay or crash, make arrangements to speak with one another via FaceTime on your phones.

## **2. Make it a two-way conversation**

Every person in the world is collectively dealing with uncertainty and anxiety as we all navigate these challenging times. Traditional performance review conversations tend to focus on basics like compensation changes, promotions granted, areas in which the employee succeeded since the last review, and highlight opportunities for improvement, skill development, and growth.

All of these factors still apply to a remote performance review, but remember that employees likely have more questions about the present and future than the past in this new environment. Approach the review as a collaborative conversation, first and foremost, and plan to listen more than you talk. Invite the employee to ask questions about the “new normal” in the company as you review past performance, new goals, and areas for development.

## **3. Discuss changed priorities openly and honestly**

Business priorities may have shifted in your company over the last weeks or months, and employees may now fear for their job security. Dedicate time in the performance review to discuss the wins and misses of the past, and how the employee can remain a valuable contribution moving forward. Clearly outline duties that may evolve or change in the coming months so the employee understands where to focus, and why.

## **4. Create a plan for how to support your employee**

There’s plenty of evidence to suggest that remote workers are more productive than those who work in a physical office, but those stats are based on employees who have *chosen* to work remotely. The fact is, remote employees may not feel connected to company culture or co-workers. Remote work arrangements can be isolating, and require a level of self-direction, motivation, and discipline that’s not intuitive for every employee. Regardless, many employees do not have a choice about where they’re working right now.

Dedicate at least part of the review to discuss how your employee can still collaborate with you and co-workers in this new normal: How much coaching, guidance, and support does she need from you while working from home? Does she understand her priorities and goals, and feel confident that she has the tools and skills to achieve them?

Every employee has a different work style and varying needs when it comes to succeeding remotely. Now is the time to get to know what your employee enjoys doing, where she feels capable and where she's struggling. Agree on a plan that will fuel your employee's professional success moving forward. As importantly, assure your employee that her mental, emotional, and physical health is as important to you as her job performance right now.

## **5 keys for successful follow up after a performance review**

As a manager, scheduling regular performance reviews for your employees is a crucial component of both their success and the overall progress of the company. However, the real impact comes in how you follow up after the performance review. This part is often left out, but without proper follow up, you miss the opportunity to ensure that points mentioned in the performance review are correctly executed and that communication remains open. Here are 5 keys to following up after a performance review.

### **Set performance goals**

The purpose of a follow-up session is to ensure that your employees are maintaining or improving their performance. This can only be done if there are goals in place to achieve. You want to set clear performance goals during each employee evaluation session, so those goals are tracked and reviewed during the follow-up sessions.

When setting goals, be sure that they are S.M.A.R.T. so both you and your employees can quickly determine whether the goal has been met or not. Also, you

don't want to give too many goals at once. Consider focusing on the most important ones first or the objectives that most closely align with your company's overall strategic goal or mission for the quarter or year.

Goals should be designed to push your employees to achieve greatness, but not overwhelm them, so be sure that you aren't setting goals that are unrealistic or unachievable in the time frame provided. Doing so can add an unnecessary layer of stress to your employee's life, which is bad for the company culture.

### **Immediately schedule a follow-up**

Being a manager requires that you wear many hats, which often leads to a packed schedule and a long to-do list. If you want to ensure that a follow up happens with your employees, one of the best things you can do is schedule the follow up at the end of the performance review. While it doesn't have to take place right after the meeting, planning it locks the event into your calendar and your employee's calendar, which makes it a priority and less likely for you to forget.

The recommendation is that you wait at least 30 days after the performance review, so your employee has time to implement recommended changes or to see if he or she continues to operate well based on what was discussed. It's up to you whether you prefer to follow up monthly or quarterly. It might be better to follow up monthly with those who have more strides to make so you can stay in regular contact.

### **Incorporate on the spot coaching**

Keep in mind that your performance review follow up doesn't have to stick solely to your official meetings. It can be more impactful for you to provide on the spot job coaching when you see an opportunity throughout the day. This requires that you keep an eye on what's happening on the floor on a day to day basis. You don't have to do so from an evaluative or micro-managing angle, but from the viewpoint of one who wants to see improvement.

When you can provide mini bits of feedback, both positive and negative, based on the performance review and goals that have been set, it can help them achieve those goals easier and build a better rapport between you both.

As mentioned, your coaching should also include positive feedback. Your employees want to know when they're doing well and when you see improvement in various areas. If they always feel that you focus on the negative, it will put them on guard which can lead to less improvement.

### **Compare progress**

During your performance review follow up sessions, you want to compare the progress made by your employees. The best way to do this is to have all relevant notes and data available to reference.

It's beneficial when you can speak in specifics as much as possible, and having this specific information can help you do so.

Compare your original notes from the performance review with those taken leading up to the follow-up session so you can make a comparison.

### **Listen more**

While performance reviews and follow up sessions are traditionally seen as an opportunity for you to share your thoughts and your opinions and your views, it's also an excellent time for you to listen to your employees.

Give them access to your notes, all of the data, and documented information. Ask for their feedback on the goals set and on how they think things are going. Ask them what they would like to see improved for themselves.

Your thoughts and opinions are not the only ones that matter, and you want to make your employees feel as though they are part of the process. This isn't the time to be a dictator; it's time to be a collaborator.

This is also a prime opportunity to learn why they might be struggling in certain areas. You can often find out about personal things or little things happening on the job that might be creating a barrier to success. If you can step in and provide support beyond what's traditionally recommended, you might be able to help your employees in a way that could lead to amazing results.

### **Be sure to consider your follow up performance review plan**

There's no doubt that performance reviews are a crucial component of building a great team of employees who can perform at and beyond their expected level. Following up is the icing on the cake because it bridges the gap between annual employee evaluations. A lot can happen in a year when life, business, stress, to-do lists, and personal responsibilities get in the way.

When you implement the 5 keys mentioned above in your performance review follow up strategy, you can rest easy knowing that you're setting your employees and your company up for success with your approach.