

Dattner Consulting, LLC

How to Deliver a Performance Review

Process

Schedule review meetings

Goal -- What do you want to accomplish? What are the one or two key areas you want the individual to focus on, improve and/or walk away with?

Strengths -- What is the person doing well?

Areas for Improvement/Development -- What is the person not doing or doing that needs improvement? How can they improve their performance?

Synthesizing the data -- In your review of the data and evaluation(s):

Determine any valid themes

Read the individual's self-evaluation if available

Complete your evaluation of the individual

Giving feedback

Feedback is least useful when it is:

- Inaccurate or untrue
- Biased due to favoritism or politics
- Insensitive and unduly critical
- Not specific or actionable
- Constituted by orders or ultimatums

Giving feedback

Feedback is most useful when it is:

- Candid and honest
- Specific and actionable
- Based on more than one incident or example
- Based on more than one person's view
- Framed positively and constructively
- Behaviorally based rather than personality based
- Summarized and integrated into key themes
- [Framed in a manner that takes context into account](#)

Ineffective vs. effective feedback

Ineffective	Effective
John is good at presenting, but his presentation skills could be improved further.	John presents well when he is giving a formal presentation. However, when meetings go “off script” John sometimes loses focus and has a hard time answering questions, particularly when there is disagreement among attendees about which direction to take. It might be helpful for John to practice in advance for presentations with a colleague who could ask tough practice questions so that John is prepared to articulate his point of view more clearly when challenged.
Jane needs to get better at project management and follow up	Jane prioritizes doing high quality work, and wants to meet and exceed the expectations of her stakeholders. However, at times, she does not set expectations clearly enough, does not understand what people are expecting or when, and does not check in enough along the way, either to provide interim updates or to ask for feedback. Jane might consider establishing regular check-in meetings to make sure that she is not perceived as over-promising and under-delivering.

Questions to ask in preparing for reviews

What are your goals for the discussion?

- Before you even begin drafting a review, consider your goals and objectives for the discussion, and evaluate how these goals may be congruent with, or opposed to, one another.
- For example, you may want to provide positive reinforcement in some areas while also giving a warning or wake-up call in others. Or you may want your team member to think about incremental improvements in certain aspects of the job while making significant changes in others.

Questions to ask in preparing for reviews

Are you focusing on their behavior, personality, or both?

- Some managers believe that setting up an individual for success requires focusing on behavior; other managers think it's about character or personality.
- Talking about what your reviewee does in specific instances comes across as less judgmental, more fact-based, and more multifaceted.
- On the other hand, discussing how someone comes across more generally can provide a simpler, more-holistic focus with easier-to-remember themes.

Questions to ask in preparing for reviews

Are you exercising your authority?

- Most bosses want to be liked, and start from a place of wanting to persuade an employee to see things as they do.
- If an employee doesn't seem to "get it" over time, you may have to become more assertive and definitive about your perceptions as well as the perceptions of those who contributed 360-degree feedback.
- It's tempting to sugarcoat feedback to preserve harmony in the short term, but doing so does not set up the individual for success in the long term.

Questions to ask in preparing for reviews

Are you conveying the right tone?

- It's easy to be either too positive or too negative in a review meeting.
- Tone of voice, facial expression, nonverbal communication, and emotion matter a lot in a review discussion.
- Your direct reports' perception of how positive or negative the feedback is can create self-fulfilling dynamics.

Questions to ask in preparing for reviews

What next?

- The most important components of follow-up to a review meeting are the goals that the individual and you agree on. In order to be motivational and effective, goals should be challenging but realistic.
- The follow-up after a performance review meeting should include the things your direct report will do to further his or her performance and learning and the things you will be doing to support and coach them toward their goals.
- After a review meeting, it's helpful to ask your direct report to send you a follow-up email that summarizes next steps and to schedule a meeting a few months in the future to review progress.

Ben Dattner, Ph.D.

ben@dattnerconsulting.com

www.dattnerconsulting.com