



Performance Reviews - Managers Guide

Introduction – Why?

For any business to be successful, everyone needs to be effective in their day-to-day roles and generally contribute to the team.

We want our people to enjoy what they do and to be happy in their work.

Having regular and structured conversations with your team will help with all the above and will be useful in navigating through any challenges and issues they might encounter.

Staff retention!?!

Preparing for the Review

Work out which review template is going to work best for you & your team – we've got a few options here for you to consider. There is no "correct way". Tweak it to make it work for you!

These are all designed to help you have useful conversations that:

- celebrate what your people are doing well,
- help them to continually improve & stay interested in their role or identify what might be next
- address any areas of concern.

1. Monthly One on One template

Some of you have regular catch ups with your people which is great. Using a template can provide a useful way to make sure you are getting the most out of that time and there is a record of what is discussed and agreed.

The purpose of the monthly one on one is to:

- set objectives & track progress
- provide an opportunity for your team members to raise any reminders, concerns, or red flags

- discuss what's going well and what's not with BAU
- And finally create an opportunity to have conversations about their development

2. Team Member Appraisal – Self Evaluation

In this option the team member completes their self-evaluation and returns it to you prior to your review conversation. (Typically done 6 mthly or annually)

This option:

- easy to prepare for the conversation
- You identify beforehand areas where you may not be aligned, and you can come up with specific examples to use
- Gives the team member time to prepare and they know what to expect and the things that will likely be discussed.

3. Performance Assessment

In this option you would typically go through the review/form together and discuss as you go.

This option:

- Could be a time saver and useful when you have team members that have worked for you for a long time and consistently done their job well.
- Caution: not everyone can think on their feet and more reserved team members may find this format difficult
- There could be surprises that pop out – are you comfortable dealing with that?

Set a date for the review with each team member and have a discussion with them about how the process will work. DON'T just email them a form and assume they will understand the process.

If using a form where the employee fills it out in advance, then give them the form in plenty of time.

TOP TIP! Make it a priority to keep the appointment day and time. Give the review your undivided attention – turn off your mobile phone & email. Close the door to the meeting room or office – don't do it in café.

TOP TIP-2 – one of the most effective ways to encourage action in the required direction is to demonstrate it by personal example. If you take the process seriously and put in the effort, the team members are likely to do the same.

Your team member fills out the review form and gives it back to you BEFORE your review meeting. (Ask for it back at least a **couple of days** before your scheduled meeting so you have time to prepare)

PREPARE! You know where they rate their performance – go through the form and think about where you rate it. Think of examples that you can use during the discussion to reinforce why you rate that way (positive or negative)

ALLOW ENOUGH TIME! It is important you plan sufficient, uninterrupted time for the review.

Conducting the Review

There shouldn't be any surprises that are raised for the first time during the review.

If you disagree with their self-rating be prepared to discuss this:

- You should also ask them for evidence/examples as to why they have rated themselves as they have
- tell them why you have rated them as you have and give examples
- agree on the final rating – ultimately it is the manager's call but ideally you will have a good enough discussion to land in the same place

Listen with an open mind and give your attention to the person speaking – there's a reason you have 2 ears and 1 mouth 😊

Don't miss the opportunity to praise for a job well done and to thank them for their efforts

Always take the opportunity to help them develop & grow

Encourage and welcome feedback on how things can be done better

If you feel there are red flags or anything that concerns you about their performance, make sure to raise these during the year, don't cork up and bring up it all at the half-yearly or yearly review.

It's your responsibility to be frank and open when discussing performance weaknesses and opportunities for development or improvement. Always use job specific and performance related examples to demonstrate.

As an overall guide of allocation of ratings see the table below:

REMEMBER! **3 - Meets Expectations** is doing a good job. Keep the scale in perspective and use the words from it. The majority of your team will be 3's or 4's5 is exceptional and if someone is getting more than one 5 you should be thinking about their next role/challenge as this indicates that they are capable of more.

Performance Level	Expected distribution of employees in this level:
1 Does not meet Expectations Performance is below what is expected on a regular basis	2%
2 Needs Improvement – Still Developing Sometimes performs at an acceptable level but not consistent or needs improvement OR new to role and still developing	8%
3 Meets Expectations Solid performance, always does a good job and what is expected	45%
4 Exceeds Expectations	

High overall performance, regularly goes beyond what is expected	40%
5 Outstanding Consistently Exceeds all job requirements.	5%

The STAR model for giving feedback

- **S Situation**- describe the SITUATION where the behaviour occurred
- **T Task**- describe the TASK the employee performed
- **A Action**- describe the ACTION the employee chose in this situation
- **R Result** - describe the outcome that occurred as a RESULT of the action

If it is constructive feedback add an additional **AR**:

- **A Alternative Action**- suggest an ALTERNATIVE ACTION the employee could have chosen in this situation
- **R Alternative Result**- describe the likely outcome that would have occurred as an ALTERNATIVE RESULT of the alternative action

