



W O R K B O O K

# MANAGER'S GUIDE TO A GREAT PERFORMANCE REVIEW DISCUSSION

Consistent and continuous feedback creates the foundation of success between employees, managers, and the business. **But, why do development conversations often happen in a black box, once per year?** For one thing, it takes time to effectively prepare for and deliver feedback. And time is tight when you're juggling all of the things. **Another big blocker? Fear.** If you're not feeling confident or equipped to address your employees performance, competencies, and skillset, it's easy to avoid.

Development discussions are arguably the most dreaded process in business - from People Management to Leaders to Employees, the process is, more often than not, avoided or labor intensive. **Sadly, this is a missed opportunity!**

So, begin where you are. There's always room for improvement and you can move the needle whether your current cadence of feedback to your team is during a once annual review process, or in impromptu meetings. Recognizing your team ensures your success as a manager. Preparing to discuss your employee's performance is essential in creating a team that is motivated, effective, and willing to go the extra mile.

**Your employees are eager to be recognized, valued, and seen for their hard work.** They want to know how to grow, what you see and value in their contribution, and what it will take for them to exceed expectations. No matter the formal, internal feedback process within your current organization, you can create meaningful conversations and build long standing relationships with your team members by creating your own continuous feedback process.

As a manager, it's quite literally your job to deliver positive and constructive feedback to your team in order to meet your goals. How you frame, structure and deliver performance feedback is crucial to the success of your career and reaching business results. With a little preparation, confidence, and a mindset shift, you will be on your way to retaining your top talent and creating collaborative team members.

Here's how to structure and deliver performance feedback that will motivate, retain, and empower your team members to do their best work, rise to the occasion time and time again, and sing your praises.

# MANAGER PREPARATION

Setting the stage for a constructive, effective meeting with your employee takes preparation on your part. Yes, your days are packed and your responsibilities are varied. However, being a people manager requires you to be aware of your leadership and communication style. To ensure you feel ready, get clear about the contribution and growth areas for each of your team members. Ask yourself:

- 1 **What are the tangible/measurable outcomes your employee has achieved? What about intangible results/efforts such as client relationships, soft skills, diplomacy, etc.**

- 2 **What specific goals did they meet and/or exceed?**

③ In what ways were you impressed with their performance and contribution?

④ Did you encounter any surprises you needed to address (positive or negative)?

- 5 What's working really well and where do you see room for improvement?  
List out specifics.

# SETTING THE TONE

Set the tone at the top of the meeting to reflect that of mutual respect, kindness, and collaboration.

“Dear Employee, I want to thank you for your contribution this quarter/year (insert timeframe here). With your efforts, our team has been able to reach significant milestones. You’ve made my job easier by handling (insert project/work here). Today I want to have an open discussion with you about your performance over the last several months and collaborate together on creating shared goals moving forward. Your input during our discussion is welcome.”

# DELIVERING THE CONTENT

Ask your employees if they'd like to start the conversation with what has gone really well over the past X months or if they'd like to begin the discussion with developmental areas moving forward? Giving your employees the option to choose how feedback is delivered will lessen the tension.

## 1 For the Performing or Over-Performing Employee:

“Dear Employee, from my perspective, you are doing a fantastic job overall and these are the areas I'd like you to focus on moving forward. (List out general focus areas that you will provide in detail via writing/goals.) I have suggestions as to how you can continue to grow and improve, however I'd like your input here as well. I also want to address what's worked really well to ensure you continue working in those effective ways.”

## 2 For the Performance Improvements Needed Employee:

“Dear Employee, as we've previously discussed, it's imperative that you meet (XYZ goal/responsibility) as part of your role and I've noticed it's been a challenge for you to do so. Your continued success within our organization requires you to make immediate and sustained improvements in (XYZ Areas). To ensure your success here, we will meet (weekly/bi-weekly) moving forward to address this. I'd like you to come prepared to each meeting to address how you are making progress towards this goal. I am here to support you in making these changes but it's up to you to put in the effort. Going forward, I'd like to see improvement in the following areas...”

# CREATING AGREEMENTS

Create an agreement about behaviors and outcomes expected moving forward. In order to deliver on the results expected of you as the team leader, what do you need from each team member? How would you like to rely on them? For example, create an agreement that your team member will show up to meetings on time moving forward. Ask the employee if something is preventing them from making it to internal or client meetings on time and ask if it's something they're able to commit to. If not, what's in their way?

Setting expectations and making agreements is far more effective than retroactively giving negative feedback about something that can no longer be addressed. Focus agreements on creating standards for the future. Let your employees know what they can expect from you as well - will you commit to one on one meetings bi-monthly to support their growth and efforts? How and when should they reach out to you for support?

# CLOSING THE DISCUSSION

Whether you deliver a stellar performance review message or your feedback includes areas for immediate improvement, take the time to thank your employee for their time, attention and effort. Close your discussion by giving your employees the option to ask questions or to take time to process what has been shared. Offer to meet again within the next couple of weeks if that would be helpful. Let your employee know if you have any takeaways - do you need to address something with your own boss or do you need to consult with HR? Close out the performance review discussion with appreciation, understanding, and a plan of action for next steps.



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