



# Performance art

Performance review meetings are often a time of anxiety. Alyson Garrido provides some guidelines for conducting an effective performance review that will set your employees up for success.

**T**he lead-up to performance review meetings can create a great deal of anxiety for both the person receiving the review and the one giving it. While there is so much focus on written feedback and rating systems, there tends to be very little focus on the meeting itself. As you and your teams prepare for this important discussion, here are some guidelines that can help ensure that the meeting is a success and both of you leave feeling satisfied and prepared to move forward.

## BEFORE THE MEETING

**On-going.** Ensuring a smooth performance review starts from the employee's first day and continues throughout their tenure. So often, the annual performance review meeting ends up being

about the past three months because that is what is at the forefront of one's mind. When a new person joins your team, create a folder where you collect notes about his or her accomplishments, adherence to deadlines, relationships with employees, praise from others and additional relevant details. This way you will not have to wrack your brain at review time to find suitable examples to share.

We have all heard that there should be no surprises during an annual performance review, but with busy schedules it can be easy to delay sharing important information and feedback until this meeting takes place. Regular weekly check-ins with your employees will ensure that you are addressing concerns and setting expectations in real time and employees can adjust accordingly.

You will both know where you stand before the annual meeting if you keep up with these weekly check-in appointments. They don't have to be hours-long engagements—just 30 minutes will typically do.

**One week before.** Schedule your employee's performance review meeting with one week's notice. One week will allow plenty of time to prepare, while not spending too much time anticipating the conversation. Ensure that the location for the meeting is in a private office, not a shared space. Ideally the meeting would take place in a neutral space where you can sit together without the implied authority of one person sitting behind a desk. If you are meeting in your office, do your best to sit at a right angle rather than across from your employee. You want to reduce formality and help create an environment that is well suited for open dialogue.

At this point, the written portion of the review should be in order. You have received your employee's self-evaluation and have completed at least an initial draft of your evaluation. It may be helpful to write your evaluation, then revisit it a few times before finalising your review based on your employee's self-assessment, feedback from key stakeholders and the notes you have kept throughout the past year. Leaving reviews until the last minute may mean that details fall through the cracks.

**One day before.** Provide your employee with a copy of their self-review and your evaluation one day prior to the meeting. This will allow time to absorb the information and process any emotions that come up around the feedback you have shared.

Clarify for yourself what you would like the tone of the meeting to be. What are the feelings with which you would like the employee to leave? How will you know if your objectives have been met? Re-read the performance review and remind yourself of your employee's short and long-term objectives.

#### **DURING THE MEETING**

**Avoid items unrelated to performance.** A performance meeting should be just that, a recap of your employee's performance, reviewing what has worked well, what needs to be improved and relevant goals moving forward. While it is common for raises and bonus discussions to creep in to this conversation, avoid these topics, if possible. If they must be discussed during an employee performance review, do so in the beginning. Leaving the topic until the end risks having a weight and distraction over the conversation until the topic is addressed.

It is also a good practice to keep the agenda items specific to the individual being reviewed. While there may be group dynamics or concerns that impact an entire department or team,

those are best addressed in a separate meeting. Bringing up such issues in an employee review may cause your conversation to go off on a tangent on team performance, rather than that of the individual being reviewed.

**Make assumptions.** You are entering the meeting with the intention of creating a positive outcome. You want your employees to perform at a high level and to understand what is expected of them. Assume that they want the same. Assume that your employee is dedicated to you, the team and the company. Assume that they have positive intentions of creating outcomes that will be beneficial. Assume that they want to be strong performers and meet expectations. Assume they have career goals that you can help them achieve. This positive outlook will help you achieve mutually beneficial outcomes and allow you to give appropriate consideration to each employee's performance evaluation and goals.

**Be friendly.** Create a conversational and convivial tone right off the bat. Open the meeting with pleasantries and comments about a shared interest or experience. This will serve to help break down any nervousness or tension as you start this important meeting.

**Listen first.** When it's time to get into the heart of the meeting, invite your employee to open the conversation with their overall impressions before sharing your views. Listen intently and ask clarifying questions to get a clear understanding of your employee's goals, objectives and perspectives. Take a coaching approach by asking for solutions rather than providing them. This will help your employee feel committed to solutions and look for possibilities rather than simply complying with your direction. Introduce your perspective, notable accomplishments, and areas for improvement after your employee has finished. It is not essential to address every item on the performance review unless it needs an action plan to continue or a change in behaviour.

**Set anchors.** The performance review meeting is a great time to reiterate targets and objectives. Start with a reminder of your team and company goals and values. This will help you align the employee review with clear parameters and measures for success. It is also an opportune time to revisit your employee's job description to update, add or remove items and treat it as a living document.

You will greatly benefit from learning your employee's drivers and career goals so that the conversation creates measurable outcomes that align with their aspirations and strengths as well. These touch points will ensure that you are in agreement regarding tasks, goals and expectations.

If your performance review includes ratings or scales that

give employees a score, it is important to give context around that score. Is a '3' or 'meets expectations' score the standard and anything more is very rare? While this is often the case, it can be jarring, especially for newer employees or those just out of school, who see 'average' or a 'C' grade as a failure. Be sure that you and your employee are on the same page in this respect.

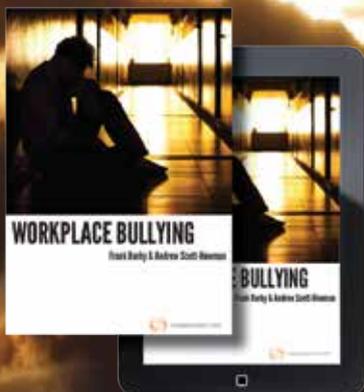
**Look forward.** During the performance review meeting, it is important to keep a future focus, remembering that the past cannot be changed. Gear your conversation toward measurable results that align with the anchors you and your employee have set. This will not only help you stay positive and focused on the assumptions you have made about your employee's intentions, but it will help you continue a conversation after the meeting to ensure that goals are met or appropriately adjusted.

**Tackle tricky messages.** It is inevitable that you will have to

give a bit of uncomfortable feedback at some point during the performance review season. In these cases, set your intention for the conversation and write out a few bullet points in preparation. These notes will be useful if you lose your train of thought. Review these bullets and your intention two or three times, but do not over-rehearse the conversation. If you memorise, you will run the risk of sounding inauthentic, or worse, losing your place in your speech partway through.

Remember that you assume your employee's best intentions and state your case around areas for improvement and what success will look like moving forward. Avoid the 'feedback sandwich' which may dilute your message by ending with praise.

In this context, be prepared for a myriad of reactions. You simply do not know how your employee will respond. Keep an open mind to objections or explanations and hear the employee



# WORKPLACE BULLYING

**Bullying is a major, but often unacknowledged problem in New Zealand's workplaces. However, recent developments in employment and health and safety law make it a problem that no one in the workplace can afford to ignore.**

Workplace Bullying deals with bullying in New Zealand's workplaces in a way that is both educational and practical. This new and groundbreaking text will be an invaluable reference for employers, managers, and workers alike.

**VISIT OUR ONLINE SHOPPING CART TO PURCHASE ONLINE**  
[www.thomsonreuters.co.nz/catalogue](http://www.thomsonreuters.co.nz/catalogue)

## AUTHORS

**Andrew Scott-Howman** – Wellington-based barrister specialising in employment law. Andrew has wide experience as an investigator in employment matters, particularly including undertaking investigations into bullying complaints.

**Frank Darby** – Has spent 37 years with the New Zealand Government leading work in occupational health, ergonomics and, more recently, workplace stress and bullying.

SINGLE EDITION (print or ebook)

**JUST \$50.00 +GST**

BUNDLE (print and ebook)

**JUST \$65.00 +GST**

Please note: The prices listed above exclude postage and handling of \$10.00 + GST. This applies to book/bundles only.



THOMSON REUTERS

out, asking clarifying questions and recapping what you have heard. If emotions run high, or you are tempted to adjourn, consider taking a break instead. Offer the employee 10 minutes to regain their composure and then resume, or, if the meeting must be stopped for the day, ensure that you pick up the conversation promptly the following day. The more often you check-in with your employee during the year, the less likely you are to be surprised by their reactions.

**Closing.** End the meeting with a recap of what you've heard and allow your employee to add their thoughts and feedback. Create an action plan moving forward which contains the behaviours that the employee will start, keep, improve or stop. Be sure that you both understand what success will look like at next year's annual performance review. Reiterate that you are there to support your employee's growth and success.

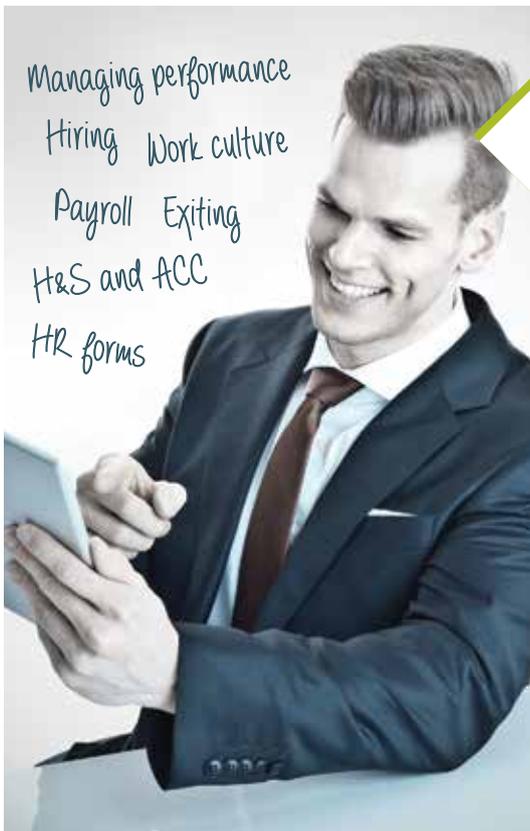
**AFTER THE MEETING**

After the meeting, send an email summary of the key points you discussed in your closing. This will be your formal record of the outcomes you agreed upon, but the conversation does not end there. Remember that performance discussions are most successful when they are ongoing and feedback is given in real time. Keep up your rhythm of regular weekly meetings to ensure success.

A little preparation goes a long way in reducing the stress of performance review meetings. Use these tips to ensure that your meetings are seen as a meaningful exercise that sets your employees up for success.



Career Coach ALYSON GARRIDO works with her clients to identify their ideal career path and present themselves in the best possible light for job search and career advancement. Visit: [www.alysongarrido.com](http://www.alysongarrido.com)



**EMPLOYMENT TODAY  
LOOKING FOR  
HR SOLUTIONS?**

Find the answers to your questions about HR and employment issues at **[employmenttoday.co.nz](http://employmenttoday.co.nz)**

**HR Partner** is a comprehensive online compliance and best practice tool designed to help HR professionals find the solution to any HR question.

**HR for Managers** is an online compliance toolkit providing managers with all the latest information and guidance to make the right HR decision.

Visit **[employmenttoday.co.nz](http://employmenttoday.co.nz)** or email **[hrrsolutions@thomsonreuters.com](mailto:hrrsolutions@thomsonreuters.com)**



THOMSON REUTERS