

# Performance Reviews still matter!

Measuring, monitoring, and rewarding job performance is crucial to productivity, competitiveness, and profitability, even during a pandemic and/or working remotely or at reduced capacity.

A well-planned process evaluates the performance of the employee and ALSO serves as an opportunity to reinforce positive behaviors, outcomes, and goals.

Also creates paper trail for future employment actions, such as promotions or terminations.

*Finally: employees want to know where they stand.*



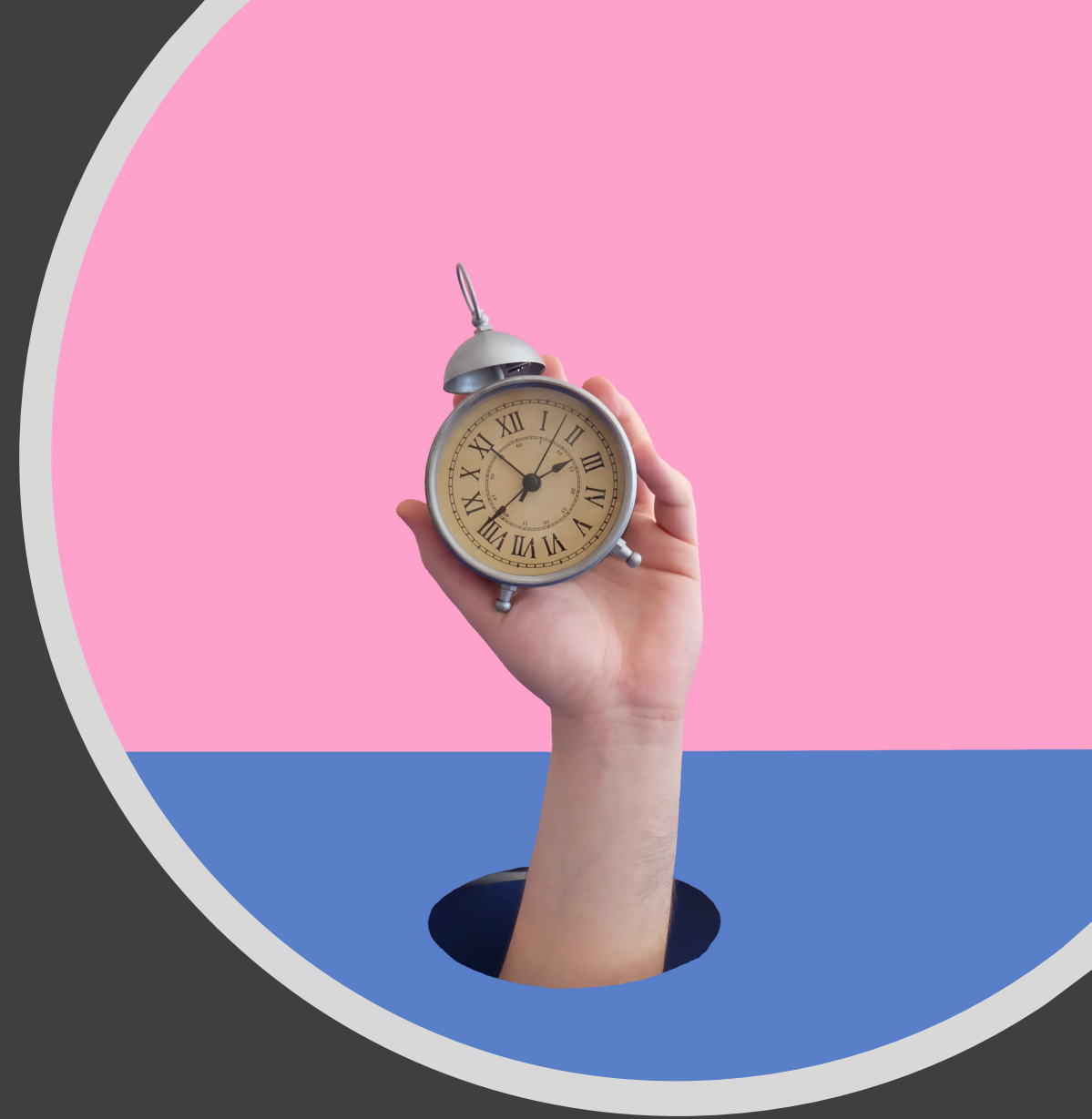
# How often should we be conducting reviews?

Unfortunately, once-a-year job appraisals are typically not enough.

Job performance management is an ongoing process, requiring:

- Goals
- Monitoring
- Feedback
- Reward

Setting goals just once a year is akin to adopting a New Year's resolution and then abandoning it by February.



# What type of review is best?

Start with some questions.

- How new is your organization to performance management?
- What are your goals for the program?
- What is your organization's culture?
- What type of work is being reviewed?
- What is the experience level of your supervisors w/r/t performance reviews?



# Types of Reviews

## BASIC

### *Best for:*

- An organization in its early stages and/or if performance reviews are a new concept and you're looking for some formality
- Work that doesn't change frequently or is methodical in nature (ex. Hospitality, healthcare)

### *Format:*

- 5-10 questions, plus rating scale
- At least once a year



# Types of Reviews

## INTEGRATED

*Best for:*

- An organization with clearly defined mission, vision, and core values
- An organization with a strong culture of feedback
- When employees or managers like/desire metrics, but also like narrative conversations between manager and employee
- When employees are equally involved in the progression of their jobs/careers



# Types of Reviews

INTEGRATED, *continued*

*Format:*

Two parts:

- 1) Measurement against Company goals and values
- 2) Measurement against Team goals and priorities

Rating Scale + Development Opportunities in each area

Overall Development Opportunities

Tangible Items/Tasks for employee and employee + manager

At least semi-annually



# Types of Reviews

## FREEFORM

*Best for:*

- An organization that has an established practice of performance management
- Where organization, employee roles, and responsibilities are not stagnant
- When an employee's work is project-based
- Organizations that prefer multiple shorter review meetings that address different topics



# Types of Reviews

## FREEFORM, *continued*

### *Format:*

- No rating scale
- Asks supervisor to answer questions such as:
  - “Given what I know of this person’s performance, and if it were my money, would I award this person the highest possible compensation increase and bonus? Elaborate on response.”
  - “Would I always want them on my team?”
- At least quarterly





# Types of Reviews

## 360/PEER

### Pros

- Expands view of an employee's performance and their effect on others.
- Has the potential to be a very eye-opening experience for the subject. It's valuable for an employee to see how others perceive them. Has the potential to provide a real opportunity for personal and professional growth.
- Increases the subject's perception of reliability. If the same themes come from multiple sources, the employee may be more willing to accept the reliability of the input and thus be more willing to make some changes.



# Types of Reviews

## 360/PEER

### Cons

- Creates an uncomfortable and sometimes upsetting situation when the organization does not have enough participants to maintain some level of anonymity among the reviewers.
- Creates frustration when an employee wants additional information or examples of an area of opportunity listed on the review. They have no one to ask for clarification about unclear comments or for more information about particular ratings and their basis.
- Adds a time-consuming component to the regular performance review process. The organization, administration, and compilation of the data (if done well) is a time-consuming process.



# Types of Reviews

## INFORMAL

### *Best for:*

- Organizations that prefer to have more of a coaching culture.
- Organizations that are able and willing to perform reviews more frequently.

### *Format:*

- Discussion with documentation
- Documentation should be consistent within departments



# Remember...

The most important components of the performance management system are that reviews are:

- 1) Consistently conducted
- 2) That questions on the review are relevant to your company's goals and culture



# Tailor to your needs

Once you've decided on a type of review, customize to best suit your needs.

- 1) Add specific assessment criteria based on the job requirements at hand, and directly related to your workplace.
- 2) Add, remove, or adjust a rating system.
- 3) Consider changing questions on a seasonal basis.
- 4) Include well-defined goals as part of the performance review process.



# Handy tips

- Review employee's performance for the **entire** period; don't base judgments on recent or isolated events only
- Consider the employee based on the standards expected to be met for the job given the employee's length of time in the job. If you include ratings in your reviews, rate the employee on how well the requirements of the job are fulfilled.
- Summarize the employee's performance since the last review (or from date of hire if this is the employee's first review).
- Keep in mind the relative importance of each factor will vary according to the position.



## Handy tips, *continued*

- After rating the employee on each factor, enter examples and comments to support the rating.
- Guard against letting your appraisal of factors fall into a consistent or routine pattern. There are usually wide differences in individuals with respect to various factors.
- At the beginning of your meeting with the employee, review the rating scale (if applicable) so the employee understands what each rating means.
- Talk through each section of the review and allow the employee time to make comments or ask questions throughout the meeting.
- Don't forget to give a copy of the review to the employee and have them sign the original for their personnel file.



Submit your **questions** now using  
the Q&A function on your screen

Or submit questions to  
**[questions@dominionpayroll.com](mailto:questions@dominionpayroll.com)**

