



Performance Review Guidance and Best Practices

Performance reviews have the potential to foster trust, motivate, and mobilize enhanced results. On the other hand, the process can also create separation, misunderstandings, and de-motivation. Paradoxically, more times than not, they create the opposite of what all of us want more of -- to know that we matter and that we make a significant impact. Whether we are the “giver” or the “receiver,” often our sense of “not being enough” or “not being seen” is activated in the performance review process. A shift in review approaches can dramatically enhance the review experience for both the “giver” and the “receiver”.

What we know

When it comes to performance, we hold the following basic beliefs:

- People are doing the best they can at any given moment; we all want to do good work.
- It is important to build on people’s strengths and to help them see what they do well.
- Once people have an enhanced awareness of what they do well, it is much easier to discuss their developmental needs.
- Mutual trust is required in order to have a meaningful discussion about performance. Thus trust must be built LONG BEFOREHAND.
- Align your intention with your action- performance reviews require understanding the difference between encouragement and advice.
 - Encouragement lets people know what they’ve done well and recognizes or rewards them for it. Its purpose is to encourage the person to continue or even increase the performance.
 - Advice lets people know what should be improved and how to make the improvement. Its purpose is to advise the person about how to perform better the next time.
- Hierarchy does matter. Accept it -- there is positional power inherent in the performance review process. Well utilized, it should serve as an accountability tool.

Best Practices:

1. Once is not enough

We know this isn’t news to you -- performance reviews should happen more than one time a year. Discussions about performance should be ongoing. We know that hectic schedules and tight deadlines are two reasons why performance discussions don’t happen regularly. If we build these types of discussions into regular practices, the weight of these discussions is regulated. Trust is created and enhanced on an on-going basis and performance is unleashed rather than stifled or mis-directed.



2. Get Curious

If people are doing the best that they can, why is it that some people don't meet standards while others exceed them? Look beyond your "shoulds" when there is mismatch between your expectations and what someone is doing or delivering. You'll need to uncover the source of the mismatch. Is it an issue of skill (the knowledge or ability to deliver) or will (motivation or desire)? Once you know this, which may only come through a skilled discussion, you are best positioned to offer credible feedback, support and suggestions. To have a good conversation about performance mismatches, you must temporarily suspend your judgments and assumptions about the mismatch and get curious about what's underneath the person's performance.

3. Break the Myth -- The S*!T Sandwich Doesn't Work

Everyone smells this a mile away – tell someone something good, tell them what they are doing wrong, and then tell them something good. It is best to split up encouragement and advice conversations and hold these discussions at separate times. Separation or "splitting" these two forms of feedback produces more effective impact. Offering both encouragement and advice at the same time may send a mixed message. People react in unpredictable ways to mixed feedback. They may:

- Respond to both the encouragement and the advice
- Hear only the encouragement, discounting the advice as "less important"
- Hear only the advice, missing the confidence-building or motivational value of the encouragement.

4. The Halo Belongs in the Manger

Year end reviews are fraught with halos (or horns) -- taking recent events (good or bad) and speaking to these as the only truth of a year's worth of effort and accomplishment. A year-end review is a great time for a more systemic review of how the recipient is mastering the mandatory competencies and hitting performance indicators given his or her experience, skill, knowledge, training, and support. At year-end time, offer a range of examples from across the year to support your assessment. For ongoing performance based conversations, it is very appropriate to offer examples of the most recent events.

5. Characteristics of All Good Performance Discussions . . .

- Timely -- as close to real time as possible.
- Observable -- link action and behavior to result and impact. Your ability to separate observable actions from your assessment of those actions will enable you to engage more effectively on both of these parts of the performance equation.
- Action Oriented -- offer suggestions on how to build upon strengths and close a gap in performance.



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6. Good Encouragement Discussions are . . .

- Credible and Authentic -- interpreted as sincere, genuine and appropriate.
- Realistic -- within the capability of the recipient.
- Positive -- builds on what people do well.

7. Good Advice Discussions . . .

FIT: Tailoring advice so that it matches the level of skill and experience of the recipient.

- a) Uses "digestible" chunks (do not overwhelm; pick 1 or 2 points)
- b) Tailors advice to the person's ability to benefit from it

FOCUS: Keeping advice "on target" (directed at the needed behavior or results) and avoiding distracters (your job as a manager is to look at the environment and remove things which are getting in the way of desired results)

- c) Refers to the performance, not the performer
- d) Avoids put-downs, diffusion, ambiguity, overload
- e) Checks for receptivity

TIMING: Giving advice at a time when people can best respond to and use it

- f) Given frequently

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