

4 Steps to Simplify Performance Reviews

by Denise Ciardello

Performance reviews! How is it that those two little words can cause grown people to feel immediately sick, emit a painful groan and get that pit in the stomach? Some people may have the internal eye-roll and exclaim 'Is it that time again already'?

The performance review process should be streamlined and impactful. It is a time for the manager to agree upon goals and skills with the employee and then deliver constructive feedback on their progress. Let's go over some key points in staying on top of performance reviews with little effort and making it the useful tool it is designed to be.

- 1- **Schedule:** When do you have them? The answer lies within your office handbook – most state yearly; with the 90 day review for new employees. The variations of when are endless – some hold them on, or near, the employees hire anniversary date; some opt to schedule one a month; and still others, choose to have one a day for 2 weeks, or however long it will take.
- 2- **Tracking:** How are you keeping track of your team's performance reviews? The most efficient ways that I've seen are to put them on the schedule in January. If the meeting must be moved, that's fine; at least it will be remembered.
- 3- **Content:** What is talked about in the review? This is typically the hardest part. We like to see a review of the past 12 months with a projection of the next 12 months, complete with setting goals. This allows for determination if additional training is needed, as well as an explanation of the employers expectations. Most owners or managers tend to only be able to remember the last few weeks, which is why we suggest having an on-going log for each employee. In this log, document all activity, and then refer to this log prior to the performance review.
It probably goes without saying that this is a good time to review any



negative behavior that has been document, either through formal counseling or verbal warnings. However, poor behavior should not be 'saved' for the review; it should be addressed immediately, throughout the year, and then reviewed for improvement at the performance review.

- 4- **Documentation:** What is documented? We suggest using the same form for all employees; given to the employee the day prior to the meeting, and then make notes on it during the conversation. It's nice to offer a copy to the employee for future reference. Next year, pull out last year's review to assist in determining if goals were met. (If you would like our review form, email info@GTSgurus.com) A copy is kept in the employee's personnel file.

The conclusion of the meeting should have the employee feeling acknowledged, appreciated, and valued for the past year's performance and motivated to focus on new, bigger and brighter goals for the coming year. These goals are to ensure success of the employee and for the company.

Remember that the most important asset you have within your company is your people, your team. Henry Ford once said that if you repossessed all of his factories and burned all of his warehouses to the ground, left with only his people, he could rebuild everything that had been lost. Investing in a bit of time with your employees will always be worth every minute.

Although employees may think that this is the time that they will be told if there is a raise in their future, the purpose of this meeting is strictly to review the employee's performance. Salary reviews are typically another meeting altogether. That is the meeting that discusses the health of the practice, which determines any pay increases. Keeping the two topics separate often proves to be challenging.

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