

MEETING OVERVIEW AND PREP

MEETING OVERVIEW

OPENING

REVIEW PREVIOUS YEAR

REVIEW PERFORMANCE METRICS

REVIEW FEEDBACK

PLANNING, PRIORITIZING, AND GOAL SETTING

BEFORE THE MEETING

SCHEDULE THE MEETING

- Identify a private, confidential location to meet.
- Identify a time period you will not be disturbed (e.g. no phone calls, no interruptions, etc.).
- Schedule at least 30 minutes to meet - preferably 1 hour.

REVIEW THE DATA

- Review employee's Pre-Review Form (if completed).
- Be prepared to discuss each area of performance and to justify ratings.
- Prepare yourself to be encouraging, objective, non-judgmental and constructive.
- If necessary, discuss ratings with your Manager prior to meeting.

PLAN THE CONVERSATION

- Use the **Conversation Planner** to support your planning, especially if you anticipate a challenging conversation.
- If necessary, reach out to your Strategic HR Business Partner for coaching and guidance before the meeting.

DURING THE MEETING

OPENING

- Explain order of discussion (or agenda) to inform employee of process, set boundaries and ease employee into dialogue
- Actively listen to employee's perspective
- Acknowledge known accomplishments
- Seek clarification on the employee's perception of their accomplishments if necessary

REVIEW PREVIOUS YEAR

- Address each goal and discuss whether or not they were accomplished
- Actively listen to employee's perception of each goal
- Provide objective feedback from a leadership perspective of each goal
- Reinforce positive accomplishments

REVIEW PERFORMANCE METRICS

- Address each metric and rating
- Discuss each rating and justification; actively listen to employee's perception of each rating
- Provide objective feedback from a leadership perspective of each rating when necessary
- Reinforce positive ratings
- Discuss areas needing improvement by focusing on strategies to improve

REVIEW FEEDBACK

- Emphasize strong performance areas (e.g. how employee adds value, strong member of team, solid competencies, etc.)
- Identify areas of opportunity (e.g. where employee can focus development)
- Actively listen to employee's ideas of their performance and allow them the opportunity to document their comments

AFTER THE MEETING

PLANNING, PRIORITIZING, AND GOAL SETTING

- Document ideas of continuous improvement (e.g. identify stretch goals/assignments, opportunities for learning/mentoring, etc.)
- Actively listen to ideas employee might have for development, and refocus on whether or not these ideas are realistic and appropriate based on job description
- Determine if employee has other professional development or career growth ideas
- Encourage frequent interaction by the employee throughout the year to clarify expectations, ask questions and seek feedback
- Utilize supplemental resources to support ongoing planning, prioritizing and goal setting:

1

SMART GOALS GUIDE

Use this guide to construct SMART goals in collaboration with the employee.

2

EMPLOYEE CHECK IN FORM

Use this form to document and discuss updates, goals, challenges and progress on a weekly basis.

3

CONVERSATION PLANNER

Use this planner to prepare for and document difficult or complex conversations with employees.

PRODUCTIVE CONVERSATIONS

SET THE RIGHT ENVIRONMENT

Setting the right environment means both the physical location and the purpose of the conversation. Setting and sharing boundaries for discussion, such as how long the meeting will last, what topics will (and won't) be covered, and letting employees know you want their feedback, ensures both parties have the right expectations going into the meeting.

NO SURPRISES

There should be no real surprises during the performance review conversation. If you have concerns about an employee's performance this should not be the first time you've raised those concerns. Similarly, if you have a high-achiever, the review conversation should not be the first time they are receiving positive feedback. Remember, performance management is an ongoing cycle of giving and receiving feedback throughout the year.

POSITIVE INTENT

One of the reasons employees often dread performance reviews is a belief -- or past experience -- that reviews are designed to call out their mistakes and shortcomings. However, the opposite should be true. Performance reviews are an opportunity to provide feedback aimed at increasing the recipient's effectiveness.

STRAIGHT TALK

As the saying goes: to be clear is to be kind. There's nothing worse than walking away from a conversation with a supervisor and having no idea what they were trying to communicate. Use clear and precise language and avoid going off into tangents.

OPEN BODY LANGUAGE

Our non-verbal cues, such as gestures, facial expressions, tone of voice, and eye contact, can say as much as the words we speak. Open body language signifies an approachability and willingness to engage in conversation.

SPECIFIC, EVIDENCE-BASED FEEDBACK

Reference **The Manager's Guide to Writing Effective Feedback**

AVOID BLAME

Blaming decreases dialogue, and may cause the employee to shut down or get defensive. Stick to the facts and come up with a solution, together.

ALLOW TIME TO REACT AND RESPOND

The performance review conversation should be just that -- a conversation. In other words there needs to be ample time for both you and your employee to speak and share feedback. Be sure to allow time for your employee to react to what you're saying and respond with their own thoughts.

ACHIEVABLE EXPECTATIONS

When preparing for your performance review conversations, make sure you set realistic and achievable expectations. Be reasonable about how much can be accomplished in one 30-60 minute conversation. Expect that some employees may need time to process and think through information and a follow-up conversation may be necessary to receive their feedback and begin looking at next steps.

AGREE ON NEXT STEPS

Be sure to close out the review conversation with an agreement of next steps. Your employees should leave this meeting with a clear understanding of "what's next".

DEALING WITH DIFFERENT RESPONSES

BEHAVIOR	STRATEGIES
Person passively agrees to everything you say or decide	<ul style="list-style-type: none"> ▪ Ensure that they do some of their own thinking; question them on their thoughts, rationale, or feelings ▪ Ask them for their own conclusions ▪ Don't be afraid of silence, give time to think ▪ Actively seek and constructively include their comments
Person disagrees with evidence	<ul style="list-style-type: none"> ▪ Ask for their reasons ▪ Listen with an open mind ▪ Acknowledge their right to a viewpoint ▪ Be determined about your facts and restate your decision
Person defends, blames or attacks	<ul style="list-style-type: none"> ▪ Don't defend, blame or attack in return ▪ Use "I" statements, not "you" statements e.g. "I have noticed that you often interrupt colleagues when you disagree." Rather than: "You need to be more professional." ▪ Don't argue or try to prove that your point of view is correct ▪ Restate the objective of the conversation ▪ Don't dismiss complaints but agree to discuss their implications at another time
Person gets emotional and/or cries	<ul style="list-style-type: none"> ▪ Acknowledge this is a challenging conversation ▪ Give them a minute to compose themselves before moving on
Person is impatient or tries to side-track the meeting	<ul style="list-style-type: none"> ▪ Clarify the agenda for the meeting ▪ Listen and note points to address later without getting side-tracked yourself ▪ Make a firm commitment to discuss the priority issue for the individual at a later date
Person talks too much	<ul style="list-style-type: none"> ▪ Don't respond too quickly – give them time to talk ▪ Restate the purpose of the meeting and the agenda ▪ Keep them to the agenda by referring to what they've said and asking relevant questions ▪ Narrow down choices and focus them
Red-flag words (e.g. bullying, discrimination, harassment)	<p>Pause the conversation: "That's a serious word and WVU is committed to a positive work environment for everyone. Can you help me understand what you mean?"</p>