

Preparing for the Performance Review

Getting the most out of the annual performance evaluation

Regular performance conversations help your employees succeed and remain engaged. The performance evaluation is a formal, documented conversation to reflect back on what they accomplished over the past year, recognize their achievements, and identify where you want to see them grow.

■ **How the performance evaluation will be used**

The performance evaluation serves as formal documentation of your employees' achievements and developmental opportunities. It is also used to facilitate conversations about growth and development. You will upload the performance evaluation for your employees to the Performance App.

■ **Before the annual performance conversation**

1. Ask each employee to complete the self-assessment, and give them time to do so.
2. Review documentation for each employee: their goals, progress, accomplishments, performance notes you've kept throughout the year, and their self-evaluation.
3. Complete your first draft evaluation of each employee, and strongly consider their self-evaluation information.

■ **During the annual performance conversation**

Ensure you have a safe, supportive environment to have the conversation. This should be a closed-door, uninterrupted private meeting. You want to foster a positive dialogue with your employee.

In general, you'll want your conversation to follow this format:

1. **Lead with strengths:** Start the conversation by telling the employee what they bring to the table
2. **Communicate your expectations:** Reiterate what it is you expect of their role, and provide examples
3. **Tell them where they are** in relation to your expectations
You should also ask questions for the individual's input relative to expectations, goals achieved, and if there are any issues that may be hindering success.
4. **Make a plan to move forward:** Collaboratively set goals and create a plan to maintain them
Plan to carry out regular performance check-ins throughout the year. Good questions to ask when establishing these goals are: "What skills would you like to develop that best fit our team's needs and your long-term goals?" "What can I do to support you in the upcoming year?"

■ **After the annual performance conversation**

1. Complete your final evaluation and upload it to the Performance App.
2. Have your regular performance check-ins throughout the year.
3. Follow up on any actions from the annual evaluation.
4. Discuss career goals and aspirations as appropriate.



Helpful Phrases & Conversation Tips

Some additional pointers:

- If they did not meet expectations, say so directly—and be prepared to discuss specifics. Don't leave them guessing.
- Always be clear about what "good" looks like when discussing expectations.
- Ask developmental questions, especially if they're a high performer.
 - "What are your career aspirations?"
 - "What experiences or responsibilities would you like to take on?"
 - "What types of developmental opportunities are you interested in?"

Instead of...	Try saying...
"You're doing great."	"Your strengths are..." "I see you bringing value to this team by..." "I see you excel when..."
"You know what I expect out of this role."	<i>Be specific.</i> "For this role, my expectations are x, x, x." "What I need from you in this role is..." "We count on you to..."
"I don't want to hear your excuses."	"I'm here to support you. How can I better do that?" <i>If you encounter increased resistance:</i> "Okay, I hear you, and I did consider that." "I wasn't aware of that, but I don't think that changes my expectations."
"You didn't meet my expectations."	"You didn't meet my expectations. You have my full support to work with you on these areas. Can we plan to meet regularly for updates and guidance?"
"This is a weakness for you." "Your work has been pretty sloppy."	"I'm confident you can increase the accuracy of your work. I recommend you take this course / read this book / etc. to refresh your skills in this area."
"You're meeting my expectations."	"You're meeting expectations. Are you open to taking on more challenging projects or responsibilities, or are you comfortable where you are?"

Most of all, remember: We're here to help you get the most out of this process. If you'd like more guidance, contact us at learndev@uab.edu.

