



OPTIMIZING PERFORMANCE REVIEWS

Holiday Greetings!

At this super busy and often stressful time of year, we'd like to provide you with a "holiday gift." It's a **process** for easier, more effective performance reviews ... that several of our client firms are using and find helpful!

Traditional performance reviews are **often dreaded** by reviewing managers and reviewees alike. They ... take a lot of time, are often emotionally difficult, and frequently do little to provide coaching, or to improve performance or skills.

The "**forms**" or **formats** that we see being used for reviews come in basically three flavors ...

- **Goals or objectives set earlier by the manager and the employee (MBO),**
- **Job descriptions (or roles) which identify the primary responsibilities of the employee, or**
- **Evaluation forms** with specific areas, such as: communication, accomplishments, teamwork, etc.

Some firms use **several** of these forms or formats, such as goals **and** roles, to be more complete.

Whichever forms or formats you use can become much more helpful for both the reviewing manager **and** the employee, by following the **attached process**.

It's in the form of a flowchart, beginning at the bottom left ... with steps 1 through 5.

Benefits of this process include:

- Targets are known and agreed on in advance.
- Both the manager and employee learn from each other.
- It's more of a conversation than an "evaluation."
- The employee is more likely to **want** to improve.

With wishes for a happy holiday season and 2011 ...

Mel

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(2)

Pre-work

Before discussion ... the manager and employee meet briefly to go over and agree on the objectives, etc. to be reviewed and discussed.

(1)

Setting Targets

Early on ... The manager and employee go over his/her targets, whether objectives, job description or something else.

(3)

Independent Ratings

Separately ... both the manager and employee **review** performance; assign ratings and any supporting comments.

(4)

Review and Discuss

Then ... the manager and employee meet to **share** their ratings and comments:

- for high ratings (give recognition!)
- for differences in their ratings (learn!)
- for low ratings (ask "what's the problem?")
- and new job objectives may be needed for the next period

(5)

Summaries

- (A) **Manager** ... summarizes **all** ratings and points of discussion for the "performance review record" that may be needed for HR, for training, for follow-up coaching and support.
- (B) **Employee** ... looks at areas of needed improvement and/or new objectives, and writes **personal action plans**, in order to do a better job and develop her/him-self. And, provides a copy of that for the manager.
- (C) **Manager** ... amends the responsibilities, objectives, or job description if and as appropriate.

Note:

Differences in ratings should be explored as to **why** they exist, **not** argued over.

START

Mel Hensey; from work in consulting and design

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