Delivering Formal Reviews

Rehearse the Conversation Prior to the Review Discussion

Prior to delivering formal feedback to your direct report, managers should prepare for the discussion and run through the conversation.

- **Ask Employee to Review Annual Goals**—Ask the direct report to review the goals for the previous year, and reflect on whether the goals have been met.
- **Rehearse the Flow of the Discussion**—Rehearse conversations and key messages before reviews take place. Rehearsing the conversation is important, particularly for the section where managers are providing feedback on performance weaknesses.
- **Decide the Performance Strengths**—Emphasizing the positive in the performance reviews can have a substantial impact on employee performance; emphasis on performance strengths in formal reviews has the maximum (36%) impact on employee performance. Consequently, begin with highlighting the strengths; think about instances to reinforce the important behaviors.
- **Provide Suggestions to Improve Development Areas**—When discussing development areas, managers should frame feedback as ways to overcome barriers to higher performance, not personal weaknesses.

Ensure the Right Setting

Managers should avoid any surprises in the formal review by delivering informal feedback all year round.

To deliver formal feedback, choose a quiet, private conference room and allow enough time to discuss the review. That said, give the employee time to understand and respond to the review, and share concerns openly with you.

- **Establish the proper climate**
  - Schedule the meeting in advance and stick to it
  - Allow enough time to discuss the review
  - Locate a private space and guard against interruptions
- **Make it clear that this is a joint discussion**
  - Listen and ask for the employee’s opinion
  - Avoid words or body language that criticize the employee’s view
  - Be willing to modify the performance management document to reflect what is discussed and agreed upon at the meeting
- **Discuss goals and performance for the performance review period**
  - Review whether the goals were met
  - Discuss performance strengths and weaknesses and cite examples. Make sure that weaknesses are not the emphasis of the discussion
  - Discuss obstacles and roadblocks that affected goal achievement
- **Discuss opportunities for growth and development in the current role or a different role**
  - Discuss the employee’s developmental and career goals
  - Provide solutions to weaknesses discussed
Checklist for an Effective Review Discussions

After reviewing the basics of what should be covered in a formal performance feedback meeting, these guidelines will help initiate and guide an effective feedback conversation.

Dealing with Negative Employee Reactions

When a manager must deliver bad news or criticism, dignity, and respect for the employee are critical. The employee must be treated with honesty and integrity. Employees may respond to bad news in different ways; you should listen to the employee express his or her feelings of hurt or disappointment and provide pertinent information in response. Examples of employee reactions and the most appropriate manager responses are indicated below:

<table>
<thead>
<tr>
<th>Employee Response #1: Anger</th>
<th>Employee Response #2: Denial</th>
<th>Employee Response #3: Shock</th>
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</thead>
<tbody>
<tr>
<td>• Acknowledge the employee’s reaction</td>
<td>• Listen actively to make sure the employee understands message</td>
<td>• Allow employee time to internalize message</td>
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<tr>
<td>• Allow employee to vent feelings</td>
<td>• Repeat or restate comments if necessary</td>
<td>• Suggest possible next steps</td>
</tr>
<tr>
<td>• Do not get defensive or argumentative</td>
<td>• Remind employee to focus on positive accomplishments (performance and personality strengths)</td>
<td>• Use silence and open-ended questions to prompt employee response</td>
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<tr>
<td>• Remain calm</td>
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Focus on Strengths to Deliver Impactful Feedback

Managers must focus on delivering feedback in such a way that employees gain useful information that will improve their performance in the future. Feedback can be enhanced by following these suggestions:

- Focus on positive accomplishments (performance and personality strengths), not failures or mistakes
- Avoid judgmental comments
- Balance criticism with positive feedback (2 positives for each negative)
- Be objective, not subjective
- Focus on performance, not personal characteristics
- Keep a positive attitude
- Listen to employee’s reaction and comments
- Offer solutions to problems
- Pinpoint specific examples