

Performance Development & Feedback: A Reference Guide for Employees

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What is a Performance Review?

A *performance review*, also referred to as a *performance appraisal* or *performance evaluation*.

This is a formal assessment whereby managers assess the employee's work performance and identify strengths and opportunities for improvement. A review can include goals and objectives for the year, highlight areas they are excelling in, and include feedback for opportunities of development.

Truly effective performance management plans often align with Key Performance Indicators of the organization and cascade down based on alignment to each role's duties and responsibilities. This allows employees a clear vision and understanding of how their role and deliverables directly impact the overall organizational performance.

The purpose of the annual review process is to promote ongoing communication and provide useful feedback regarding job performance, to facilitate positive working relationships, to provide a historical record of performance, and to contribute to professional development. Documentation is critical during and after a review.



Leadership Training Melbourne Image

Planning: Management and staff will meet to discuss and set (SMART) goals and objectives. Goals and objectives should be aligned with both the organizational/departmental objectives and the employee’s role.



Image Source: GPS Human Performance

Tracking: Throughout the year progress will be tracked to see if any adjustments need to be made or whether more time and effort need to be applied to meet the outcomes. Examples of performance are collected and documented. These goals are measurable, these measures are used to define progress. Keep in mind, sometimes plans change, roles change, and this is a living breathing document and process. Managers can adjust these plans with their employee, adding and deleting items as needed. Employees may not do this on their own.

Regular Feedback: As discussed, regular discussion points ensure everyone is on the same page, there are no surprises, issues or concerns are addressed, and employees know where they stand.

Formal Review Meeting: Employees may be asked to provide a self evaluation in advance of this meeting. Employees and Management will meet and discuss the outcomes tied to the goals and key performance commitments. Management will assign an overall performance rating and discuss it with the employee, along with highlighting positive achievements and coaching on areas that may require improvement.

Tips for Employees

- Managers may be asking you to help set goals and objectives with them, to plan career development objectives etc. This is to really help ensure you understand how your contributions to the team truly contribute to the overall performance of the company. Give thought to possible objectives or ways to demonstrate competency and values, be prepared for, and participate in this process. It is a great opportunity to engage yourself on your performance plan for the year.
- You are accountable for your performance, for demonstrating competency, value, and delivering on goals and objectives throughout the year. Management is a support system that can assist you with additional training, shadowing, coaching, etc. Utilize this support system when required.
- If you are struggling with any areas of your role, talk to your Manager as soon as possible. Give thought to what may be contributing to the struggle and some solutions that may help you overcome this struggle.
- Actively participate in one-on-one meetings and coaching sessions. Be prepared to discuss how you are doing and any assistance you may require (is there a process maybe you don't fully understand?), discuss any concerns or possible process improvements, bring ideas to the table on possible career development opportunities (training courses, books, webinars, acting assignments etc.).
- Keep a notebook (hard and/or soft copy) to keep record of your accomplishments and areas of development throughout the year. Each week, jot down the situation, date, and outcome in a few sentences. Same goes for any situations that did not go your way or you feel you could have delivered on more effectively. At the end of the review period, you can prepare for the final discussions by reviewing these situations and being prepared to complete a self evaluation and/or discuss these scenarios if you agree or disagree with your supervisor/manager's assessment.
- Be open to feedback from your management team, and work on any development plan if required with them. They are trying to help you succeed. This is a two-way conversation and you may have opinions on what would assist you in moving forward and contributing to the organization. Bring those opinions to the discussions.