

## The impactful performance review

*Objectives and evaluation must be clear*

**A**round this time every year, Performance Review Stress (PRS) shows up on managers' faces and in their disposition. Most managers know what they want to say, but they're not quite sure how to construct the right language. This leads to frustration, which in and of itself, can disrupt the creative flow.

To simplify this process, and lower your PRS level, here are some key points to help you construct the right language that supports high performance and can withstand a legal proceeding if necessary.

### Measureable performance objectives

A great performance review begins with performance objectives that are specific, measurable and clearly communicated. To illustrate, compare these two statements:

- A.** Run more productive meetings.
- B.** Develop an agenda and distribute it three days before the meeting. As the facilitator, monitor the conversation and if the group digresses, gently redirect its attention back to the agenda.

If you were to receive these two statements on a performance review, which one would help you better understand and achieve the stated goals?

I hope you selected "B."

Now reflect on these two objectives:

- A.** Become a better leader.
- B.** Participate in the Visionary Leadership training by June. Debrief the leadership team on the key learn-

ing points you took away from the program at the next team meeting. As part of your debriefing, include two recommendations that would help our team members become better leaders.

Which statement, "A" or "B," provides better direction so the employee knows what needs to be accomplished and how progress will be measured?

If you selected "B," you would be correct.

To test if you have a well-crafted performance objective, it should answer these three questions:

- » What is the employee expected to do?
- » What tangible evidence identifies that the employee has achieved the objective?
- » What is the timeline?

With clearly defined objectives, your commentary should address the effort and results that the individual has accomplished to date. It's best to use fact-based information rather than subjective or anecdotal information. Subjective language reflects an impression or opinion which includes comments like, "He's arrogant or unprofessional." Or, "He's efficient and friendly." Even a comment like "Phil is a strategic thinker" isn't concrete. The comment doesn't tell Phil what he needs to do in the future to be successful.

If you were to add specific actions and results to the phrase "strategic thinker," the description becomes more tangible: "Mac anticipates consequences not



only to his department, but to the larger stakeholder base. When we were evaluating the new ERP software, Mac identified that the package we were favoring would not link to our CRM system. Everyone else missed this. He took time to go through the demo and viewed it through the lens of how we plan to operate in the future. As a result of Phil's initiative and strategic thinking, he saved the company from making a costly decision and redirected us to a viable solution."

### Writing specific and complete descriptions

When writing commentary, include detail. These simple questions will help you develop specific context:

- » What happened?
- » Who was or should have been involved?
- » What was the timeline?
- » How many?
- » Where?
- » How often?
- » When?
- » Who?

The examples below demonstrate the importance of including detail:

**Vague:** Jacques continually misses deadlines.

**Specific:** Jacques has missed six out of eight deadlines since September. This includes four deadlines from our department and two from finance. As a result, other employees have had to rearrange

their schedules and work late to meet the project deadlines.

**Vague:** Katie is a self-starter and works well with others.

**Specific:** In April, Katie saw the need to improve communications between sales and operations so she scheduled meetings between the department leaders, facilitated fact-finding discussions, and followed up with meeting minutes. During her discussions with the department leaders, she identified some communication gaps and was able to resolve them. These two groups now meet weekly and are beginning to work collaboratively to resolve customer order requests and issues. This has resulted in a 7 percent

increase in on-time delivery.

To keep your PRS level low, make it common practice to schedule informal performance review discussions throughout the year. This will eliminate the surprise factor when employees read your commentary and it reflects the numerous conversations over the past year with an emphasis on how to leverage their talent to best achieve the upcoming year's business goals.

Best of luck! ■

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