

Directions - For the Leader

1. Here are a few things to remember as you prepare for it:
 - **It is not an event:** Having performance discussions monthly (at the very least quarterly) allows for plans to be updated, priorities to be reset, and support needs to be defined.
 - **Look forward time > Look backward time:** Balance positive comments with negative: Use a ratio of 3 to 5 positives to 1 negative and work to spend more time on what is next.
 - **Remember the top 6 of the 12 questions Gallup uses to measure employee engagement:**
 - I know what is expected of me at work.
 - I have the materials and equipment I need to do my job correctly.
 - At work, I have the opportunity to do what I do best every day.
 - In the last seven days, I have received recognition or praise.
 - My supervisor and/or someone I work with seem to really care about me as a person.
 - Someone I work with encourages my development.
 - **Think if it as a conversation, not an evaluation:** This is supposed to be one of many conversations that address some or all of the six bullet points above.
 - **Goal - Truth and Trust:** Getting your version and their version of the truth on the table and building trust through being transparent, consistent, and authentic is important.
2. Key Steps in Preparing
 - A. Identify the date and time 2 weeks before. Deliver the preparation questions to the person being evaluated 5-7 days before the review date. Include a copy of these directions. *Make sure they see both the directions for YOU and for them. Make this transparent.*
 - B. Find a place that is quiet and relaxing for the person (ideally not your office or their office) and plan 60 minutes of *uninterrupted* time. Make the time a priority.
 - C. If you are planning on getting feedback from key customers (internal or external) or teammates make the request 3-5 days before you need it.
 - D. Give them a completed copy of the form the day before the discussion.
3. Leading the Performance Discussion
 - Review their feedback first – Kick-off with the question: What part of this feedback form was the easiest and what part was the most difficult for you?
 - Review each section, highlighting what they said and what you said.
 - First, complete the pieces before the signature and both sign the form.
 - When giving feedback, focus on 3-5 things they did well and one area of improvement
 - If the performance in the core responsibilities is below expectations – focus all the discussion on the plan to fix that. Ignore the rest of the form except the action plan.

Directions - For the Reviewee

1. Here are a few things to remember as you prepare for your performance conversation:
 - **It is not an event:** If you have had questions or needs around your work then hopefully you have asked your leader – especially if there have been things on your mind for over a month. But now is the time to ask if you have not.
 - **Look forward time > Look backward time:** Balance positive comments with negative: Use a ratio of 3 to 5 positives to 1 negative and work to spend more time on what is next.
 - **It is not about the money:** We all want more. The main focus of this is to reset goals, get concrete feedback on your past performance, and spend time talking about your future in this role, the company, and in your career. Compensation will be discussed, but if you have some strong feelings on compensation make them know before this discussion. It is important to spend at least half the time looking forward.
 - **This is your time:** The review form and the pre-questions are all focused on making this a rich and significant conversation that will be continued throughout the year.
 - **Organizational goals might come first:** The health of the organization is very important, so you might be asked to do things that are not necessarily what you do best or what you want to do. A good goal in any business climate is to have one development goal just for you, so work for that.
2. Key Steps in Preparing
 - A. Answer the questions on the sheet given you and hand it in to your leader 48 hours before your scheduled conversation time.
 - B. Answer all of your questions to the best of your ability. The forward looking questions will be the biggest challenge for most people. Do your best to get something down, but there is not a set number of specific answers required.
 - C. Relax – Easy to say, but often hard to do. Remember the goal – **To have a great conversation about how you are doing and make plans for a more successful future for you and the organization.**
 - D. Be ready to hear the statement “Tell me a little bit more about that”. Your opinion matters and, sometimes, your leader will not have an answer. This space/process should allow for unanswered questions to be handled later.
3. Key Next Steps
 - Complete the conversation and sign the forms.
 - If there are unanswered questions or things that you need to think about, schedule a follow-up meeting to address those before you leave.
 - Establish ownership for development items and follow-up. You should be the owner.