

How to Conduct a Performance Review Meeting

Leading a performance review meeting with a team member who is, generally, performing well can seem like a fairly straightforward task. It is still important, however, that the meeting is well structured, productive and helpful for the employee. This guide provides a framework for conducting an effective performance review meeting with a good performer. [1]



1. Set the scene

It is important to **set the employee at ease** at the beginning of the meeting. You can do this by:

- offering refreshments and taking a few minutes to make small talk before you start
- briefly explaining the purpose of the meeting, emphasising the benefits: this is an opportunity to sit down uninterrupted for an hour or so to discuss the employee's performance, development, strengths and aspirations and to share ideas about how to work together more effectively
- commenting positively on the employee's overall performance (or specific aspects of it, if more appropriate)
- proposing the format of the meeting and establishing whether the employee has any specific issues they would like to discuss, so you can finalise the meeting agenda together

2. Invite self-appraisal

The aim of this part of the meeting is to encourage the employee to reflect on their

performance since their last review meeting. It is a good idea to ask the employee **open questions** to help them do this. [2] For example:

- How have the last few months been for you?
- What have been the main successes?
- What tasks/projects have you found the most satisfying?
- What have you enjoyed the most?
- What have you found the main challenges to be? How/to what degree have these been overcome?
- What have been your main frustrations or disappointments?

If the employee introduces issues here that require further discussion, avoid getting bogged down in detail at this early stage of the meeting. Instead, you can advise the employee that you will add the issue to the agenda and address it in more detail later on in the meeting.

3. Jointly review the employee's personal objectives

The next part of the meeting should focus on the employee's **personal objectives**. Following these steps will help you to ensure that you cover off all the necessary points during this stage of the meeting:

- If you have not already done so, quickly establish if the personal objectives agreed in the employee's most recent performance review meeting are still current. If one or two objectives have been superseded, acknowledge this early on to prevent the employee from worrying needlessly that they haven't been achieved.
- Address one objective at a time. Invite self-appraisal from the employee first, before giving your own feedback, remembering to focus on the positives. If you feel the need to brush up on your feedback skills before conducting the performance review meeting, you will find some useful resources in the **Feedback topic** to help you do this.
- Ensure an appropriate balance is achieved between discussing successes and challenges/disappointments. Spending a disproportionate amount of time focusing on one or two shortfalls or frustrations could distort a relatively positive performance meeting. If you do discuss problems or challenges that require more thorough analysis, it is a good idea to set up an additional meeting with the employee to focus on these issues in closer detail.

4. Jointly review the employee's personal development plan

The next stage of the performance review meeting should address the **training and development activities** in which the employee has participated since your last performance review meeting. You might find the following questions helpful:

- How useful did you find the training/development activity?
- Did it deliver the desired results?
- Did you gain any additional benefits?
- How appropriate was the training method for you?
- Is there any further action or support that you feel you need?
- Is there anything I can do to help you develop more in this area?
- Are there any changes we could make as a team that you feel would help you?

If you have observed an improvement in the employee's performance since they took part in a training and development activity, then this stage of the performance review meeting provides you with the ideal opportunity to feed this back **constructively**. You might also be able to comment on **improvements** you have noticed in the employee's confidence, interpersonal skills, technical competence, knowledge or approach to their work since they took part in the training and development activity.

If at this stage of the meeting it transpires that the employee has a new training and development need, or one that has not yet been met by the activities already undertaken, you should **discuss the best way forward**. Is there a training course the employee can attend, or would they benefit more from being coached or mentored by you or a colleague? Alternatively, would this development need be better met by self-study? If this is the case, how could you support this?

5. Encourage upward feedback

If the employee has not already provided you with **upward feedback** by this stage of the meeting, you should encourage the employee to do so now. Topics you can ask for feedback and ideas on include:

- **improvements** that could be made to organisational systems and processes
- how work could be **delegated** more effectively
- what **level of supervision** is appropriate for the team
- how you can both **work more effectively together**
- how well you **communicate** with the individual and the wider team

6. Agree next steps

Some organisations close the performance review meeting at this stage and establish a time in the future for the manager and team member to meet again to agree on a set of future objectives. If this is the case in your organisation, then you should now draw the meeting to a close. The '**conclude the meeting**' section of this guide provides some advice on how to do this effectively.

However, in other organisations the manager and team member agree on future objectives as part of the performance review meeting. If this happens in your organisation, at this stage you should ask the employee to suggest a set of future objectives. These should be **specific, measurable, achievable, relevant and time-bound** (i.e. S.M.A.R.T). Discuss each of their suggestions and agree on the objectives that meet these criteria.

If the employee fails to identify an objective you feel is particularly relevant, or is struggling for ideas, you can contribute your own suggestions, but it is important that the employee is given the chance to suggest their own set of future objectives in the first instance.

7. Conclude the meeting

Bring the meeting to a close by:

- asking the employee if they have any additional questions and address them if they do
- summarising their key achievements and thanking the employee for their contribution to the team and wider organisation

- confirming the areas of improvement that have been agreed and how these will be taken forward
 - summarising any housekeeping details such as how you will record the main discussion points and when
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[1] Some organisations may refer to this element of their performance management system as a **performance appraisal**, or **development meeting**. For the purposes of this article, we shall use the term 'performance review', but the information relates to any organisational process in which a manager facilitates a structured discussion with team members about their performance and development, and agrees upon a set of objectives, next actions and training needs.

[2] Open questions are, as the name suggests, open-ended, and can prompt a range of potential responses. They cannot be answered by saying 'yes' or 'no', and usually begin with words such as 'how', 'what', and 'why'.

Image Credit: Flickr [Sonny Abesamis](#) (accessed 17 December 2014).