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# 10 Secrets to an Effective Performance Review

***Examples and tips on writing employee reviews, performance evaluation, sample performance review and employee evaluation forms***

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## **10 Secrets to an Effective Performance Review:**

*Examples and tips on employee performance evaluation, writing employee reviews, a sample performance review and employee evaluation forms*

**F**or managers, reviewing employee performance is a daunting yet critical function of their job. Yet you need not look upon it with dread.

Instead, approach the performance appraisal process as a golden opportunity to give your staff feedback, listen to employee comments, review the job description, and discuss and correct performance problems.

*10 Secrets to an Effective Performance Review: Examples and Tips* shows you how to conduct positive, valuable assessments that lead to maximizing staff performance and helping your employees achieve their professional goals and your organization's objectives.

### **Performance review examples and tips #1**

#### ***Use performance logs to simplify employee reviews***

It happens to every manager: You sit down to prepare a staff member's review and realize you can remember only what the person has done the past few weeks. Or, you allow only a single incident (good or bad) to color your assessment.

If you're relying solely on your memory to evaluate employee performance, you're making appraisals far more difficult than necessary. That's why it's best to institute a simple recording system to document employee performance.

The most useful, easy-to-implement way is to create and maintain a log for each employee. Performance logs needn't be complicated or sophisticated. They can simply be paper files in a folder or computer files. Choose whatever means you're comfortable with.

The key is to establish a system that you will use regularly. No matter how you take notes, make sure to keep them confidential.

## **Recording performance**

For each employee you supervise, the file should include a copy of the person's job description, job application and résumé. Then follow these steps for recording performance:

- 1. Include positive and negative behaviors.** Recording only negative incidents will unfairly bias your evaluation. Make a point to note instances of satisfactory or outstanding performance, too. One way to ensure a balanced reporting is to update employee performance logs on a regular basis, instead of waiting for a specific incident to occur.
- 2. Date each entry.** Details such as time, date and day of the week help identify patterns that may indicate an underlying problem before it becomes more serious.
- 3. Write observations, not assumptions.** In all log entries, be careful about the language you use. Performance logs can end up as evidence in a lawsuit. Your log comments should focus only on behavior that you directly observe. Don't make assumptions about the reasons for the behavior or make judgments about an employee's character. Keep out any comments that border on personal comment or that show personal prejudice.

Many employee lawsuits can be quickly dismissed if performance logs can clearly demonstrate a history of performance problems leading to a firing.

- 4. Keep out biased language.** A good rule of thumb: Any statement that would be inappropriate in conversation is also inappropriate in an employee log. That includes references to an employee's age, sex, race, disability, marital status, religion or sexual orientation. Don't suggest reasons for employee actions or make connections between events without direct evidence.

For example, you may know that Dan's wife recently filed for divorce, but don't suggest in the log that his personal problems are the reason his work performance has slipped.

- 5. Be brief, but complete.** Log entries should use specific examples rather than general comments. Instead of saying, "Megan's work was excellent," say, "Megan has reduced the number of data entry errors to fewer than one per 450 records."

**6. Track trends.** If you begin to see patterns, make notes in the log or flag prior incidents of the same behavior. Bring your observations to the employee's attention only after you've defined a specific problem.

### **Performance logs: What to include and leave out**

**Include:**

- Project assignments and deadlines met or not met
- Your assessment of the quality of an employee's work
- Instances of tardiness, work absences or extended breaks
- Disciplinary discussions and actions taken
- Employee responses to problems and questions
- Positive contributions to the work effort
- Details of significant personal interactions with the employee

**Don't include:**

- Rumors or speculation about the employee's personal life
- Theories about why the employee behaves a certain way
- Information about the employee's family, ethnic background, beliefs or medical history
- Your opinions about the employee's career prospects
- Unsubstantiated complaints against the employee

## **Performance review examples and tips #2**

### ***How to conduct positive, valuable assessments***

Sitting down with an employee to conduct the appraisal review is the part of performance reviews most managers dread. But the session doesn't have to be tense or uncomfortable. It can be a productive, enlightening and morale-boosting exchange. The key is to go into the review meeting fully prepared and with the right attitude.

Approach the evaluation as a mutual learning experience for you and the employee. You can gain valuable insights from your staffers, and you have information and experience that can help bring out their best.

Don't consider the review a critique of the staff member's duties. Instead, look at it as a routine checkup. Go in ready to talk, listen and recharge your relationship.

## **Setting the right atmosphere**

Performance-related meetings and performance reviews are emotionally charged events. You can help reduce the tensions by choosing the right time, place and surroundings:

**The right place.** Like any strategic planning meeting, hold your review in a private, neutral environment. A small conference room is ideal. If you can't find a neutral room, use another manager's office, preferably one with a casual seating area.

**The best time.** Avoid meeting during busy or stressful times for the employee. Ask the staffer if the time you've chosen is convenient, and be ready to change if he or she seems hesitant. Don't squeeze in a review between two other meetings or before lunch. Try not to hold reviews on a Friday afternoon, especially if you plan to discuss serious performance problems.

**Duration.** Dedicate two uninterrupted hours to the discussion. You may not need the full period, but it's better to schedule too much time than too little.

**Atmosphere.** Create an environment that supports discussion, cooperation and negotiation. Sit beside your staffer, not across the table. Place your paperwork near at hand, but not directly in front of you. You don't want anything to distract you. If you must use your office for the review, come out from behind your desk.

**Interruptions.** Eliminate as many interruptions as possible. Hold calls or forward them to voice mail. Put a "Do not disturb" sign on the door.

## **Focus your words on results**

Help the employee feel at ease from the outset. But don't get caught up in small talk. False intimacy may increase the employee's discomfort and destroy the meeting's businesslike tone. By the same token, don't make light of the review process or give the impression that you are just "going through the motions." Emphasize that this meeting is important and you want it to be productive.

Also at the beginning, provide an overview of the points you want to discuss with the employee. Make it clear that you don't expect to do all the talking.

Start by discussing any problems you've observed with the employee's performance. Address each problem individually, cite specific examples and let the employee respond. Don't bring up a new problem until you've thoroughly discussed the current one. Use the following framework to discuss each problem:

- **Describe the performance problem.** Focus on the employee's results and behavior in specific, nonjudgmental terms.
- **Reinforce performance standards.** Your staffer already should know the standards you expect, so don't spend a lot of time discussing them. Review them quickly, then move on. If the employee challenges the validity of a standard, calmly state your reasons for requiring it, and gently steer the conversation back to the reasons the person didn't comply. If necessary, refer to the employee's job description to confirm the responsibilities associated with the position.
- **Develop a plan for improvement.** Your review preparation should have included a plan for helping the employee improve performance. During the meeting, the employee may suggest additional solutions. Agree on a method for improving performance in the short run, and establish some options in case the first method proves ineffective.
- **Offer your help.** Show your commitment by helping your staffer obtain training, resources or other assistance to reach performance goals.
- **Alternate negative and positive comments.** If you have a list of performance problems to address, be sure to insert some positive comments along the way.
- **Emphasize potential.** Remind employees that they can apply their strengths to their weaknesses. For example, an employee whose reports are riddled with statistical errors may have successfully designed a complex computer model. The employee clearly is capable of producing accurate work, so point that out.

### **Performance review examples and tips #3**

#### ***Turning a negative into a positive: 4 examples***

During performance reviews, use clear, nonjudgmental language that focuses on results and behavior. Notice the positive and negative aspects of these statements:

- "Your work has been sloppy lately." (*Negative: too vague*)
- "Your last three reports contained an unacceptable number of statistical errors." (*Positive: cites specifics*)

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- "Don't you bother to proofread anymore?" (*Negative: accusatory tone*)
  - "Is there a reason these errors are still occurring?" (*Positive: gives employee a chance to explain*)

- “You’re obviously not a mathematician.” (*Negative*: focuses on the person, not on performance)
- “I know you’re capable of producing more accurate work.” (*Positive*: reaffirms confidence in employee’s abilities)

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- “Don’t let it happen again.” (*Negative*: blanket demands)
  - “How can we prevent errors from creeping into reports?” (*Positive*: asks for feedback on improving performance)

## **Performance review examples and tips #4**

### ***How to measure an employee’s ‘intangible’ traits***

As part of the performance review process, supervisors are typically called upon to evaluate employees on the basis of intangible factors, such as cooperativeness, dependability and judgment. The higher up the organizational chart, the more important those traits become. Yet most supervisors find intangibles the most difficult factors to evaluate, probably because they seem so personal.

Rather than assessing concrete behavior, you may feel as though you are evaluating someone’s personality or human merit. While intangible factors may seem personal, they’re important to maintaining effective working relationships and getting the job done.

### **Match traits to the job**

One key to assessing an employee’s intangibles is to ask yourself which traits are vital for each job. Cooperativeness may be critical for a staffer working on a team, but not for a security guard working the night shift. Initiative would be key for a product development manager, but less so for a payroll clerk.

Before performing an employee’s review, critically review the intangible factors included in the person’s performance standards. You should be able to comfortably answer the question: “Why is this employee rated on this measure?” Remember, every performance measure should be rooted in a concrete operational goal of the organization.

## **Employee evaluation form measuring intangible traits**

*As part of the performance-review process, supervisors can use the following questions to help quantify the intangible qualities of their employees.*

### **PLANNING**

1. Does the employee set verifiable short- and long-term goals?
2. Are the employee's goals in tune with company needs?
3. Does the employee's planning show sound assumptions reflecting the company's goals and resources?
4. Does the employee typically achieve the expected results?

### **ORGANIZATION**

5. Is the employee aware of what is going on in his or her department, including who is doing what?
6. Does the employee know what the department can do in an emergency?
7. Does the employee do a good job of delegating work according to subordinates' abilities?

### **INTELLIGENCE**

8. Does the employee see relationships between facts and draw appropriate conclusions quickly?
9. Does the employee learn from experience?

### **JUDGMENT**

10. When confronted with an emergency, does the employee quickly recognize the most important priorities?
11. Does the employee appreciate the financial implications of his or her decisions?
12. Does he or she make decisions quickly, but not hastily?

### **INITIATIVE**

13. Does the employee anticipate what has to be done?
14. Does the employee perform well in the absence of superiors?
15. Has the employee made original suggestions to improve operations?

### **LEADERSHIP**

16. Does the employee explain rather than command?
17. Do people listen closely when he or she speaks?
18. Does the employee spell out the benefits of doing things his or her way?
19. Does he or she deal smoothly with unexpected developments?



## **Match traits to behavior**

You can't help being subjective when evaluating intangible factors. But you can avoid bias by focusing on *concrete* examples of instances in which the employee displayed positive or negative behavior regarding a particular trait.

Keep good documentation during the year, preferably by keeping an ongoing, simple performance log for each employee. It should track specific examples of the person's positive and negative performance and behavior. Include notes on intangibles as you go.

When it's time to discuss intangibles during feedback or formal review, do your best to tie those traits to tangible examples of workplace wins and losses.

For example, you might say, "I was pleased by your efforts to solve that customer's problem last week. You defined the problem, considered possible causes, brought together a team and solved the issue quickly. Your actions demonstrated initiative and sound judgment; you didn't try to do it all yourself. You took responsibility for solving the problem, but you knew when to ask for help."

## **Performance review examples and tips #5**

### ***Avoid phrases that can sabotage job-review meetings***

When you talk with employees about their performance reviews, beware of using common phrases that can unintentionally communicate the wrong message, or come across as too negative or personal.

Certain phrases can kill employee morale, weaken productivity or open up the organization to a discrimination lawsuit.

Your goal is to deliver reviews that help shape employees' performance without becoming sidetracked by anger, emotion or fear of conflict. To do so, avoid the following phrases:

**"You're wrong."** If an employee tries to explain why his or her job rating should have been higher, don't slap back with a Trump-like, "You're wrong." That will only trigger anger and more confrontation. Instead, turn back to your documented facts of the employee's performance and say, "I know you disagree, but I believe this evaluation accurately reflects your performance."

**“What was your problem?”** Don’t use the question as a way to ask why an employee had difficulty completing a project or task. Employees will bristle at such a statement. Instead, say, “What were the conditions from your perspective that made it difficult for you to complete the task?”

**“You really did a great job but ...”** Whatever comes after the “but” negates the preceding compliment. Don’t directly connect praise with constructive criticism. Instead, say, “On the other hand, you can do even better by making these improvements.” Then cite them specifically.

**“I understand.”** This phrase can excuse unacceptable performance or behavior by conveying empathy. Avoid it when possible.

**“Your position here is solid so long as you keep up the good work.”** You may intend such statements to encourage good performance, but they’re legally dangerous because they imply an employment contract that a court could find binding. That limits the organization’s ability ever to fire the person.

## **Performance review examples and tips #6**

### ***4 steps to help employees reach their peak performance***

It sounds so easy: Expect high performance and you won’t be disappointed. Expect so-so performance and that’s what you’ll get. But reality is more difficult.

To help your employees maximize their productivity, use these four practices to define what you mean by high performance and lay out how you expect your people to attain it:

- 1. Involve them in setting goals.** Never assume you’ve got buy-in. Rather than blindly dropping project goals, individual goals or the organization’s goals onto workers, approach them with the thought, “What do you think you can achieve?” Then negotiate your expectations.
- 2. Keep the goals realistic.** Any goal—whether it’s at work, at home or on the athletic field—needs to be difficult, desirable and doable. Setting goals too high will only deflate the worker; setting them too low will erase the challenge of work, which will turn off the person in its own way.
- 3. Hit their buttons.** People have their own motivations; find out what they are. *Examples:* the will to win, enjoyment of teamwork or a higher mission, such as

helping clients succeed. Express the overarching vision, and then let your people figure out how to make it happen.

**4. Avoid micromanaging.** You may want to lay out every detail of how employees should achieve those goals, but resist the temptation. If you spend most of your managing time telling employees how to do their work, rather than trusting them to reach the clear goals you've set, you're treading into micromanagement waters.

## **Performance review examples and tips #7**

### ***5 warning signs of performance review problems***

Job reviews shouldn't be paper-moving programs that return zero value. Here are five symptoms that warn of trouble in a supervisor's appraisal process, according to Joan Rennekamp, HR pro at the Denver law firm of Rothgerber, Johnson & Lyons:

- 1. Employees are unpleasantly surprised by the ratings.** Performance appraisals shouldn't contain surprises. They should be a summary of comments employees have already heard throughout the evaluation period. Unpleasant surprises indicate that supervisors are not being candid or communicative with employees.
- 2. Ratings by one supervisor or department are uniformly excellent.** Although it's inappropriate to apply a "bell curve" to employees' performance, it is also inappropriate to rate everyone at the same level.
- 3. Great employees don't receive great ratings.** Look around at the employees who are the strongest. They should be receiving the best ratings. If not, your appraisals aren't rewarding those they should.
- 4. Employees who are dismissed have recently received excellent appraisals.** One purpose of performance reviews is to provide documentation for the organization in case a dismissal is necessary. When the performance appraisal doesn't support a later decision, it can make it more difficult for the employer to defend its actions.
- 5. Productivity generally goes down during appraisal time.** The purpose of performance reviews is to increase productivity. Any process that's not

contributing to that goal should not be continued. If your system is not doing so, don't hesitate to rate it as "unsatisfactory" and design a new one.

## **Performance review examples and tips #8**

### ***Writing employee reviews: Steer clear of two common errors***

Say you manage a 55-year-old employee whose productivity drops over the year. Instead of citing specific, measurable examples of this decline in his performance review, you note, "Kevin doesn't seem to have the energy level anymore to truly succeed in this department." Still, you rate Kevin's work as "average," the same as last year.

That example highlights two of the more common—and legally dangerous—pitfalls in writing performance reviews:

**1. Evaluation of attitude, not performance.** Vague statements that attack an employee's demeanor could be interpreted as some kind of illegal age, race, gender or disability discrimination. Instead, supervisors should use concrete, job-based examples to illustrate any criticism.

In the example above, referring to Kevin's "energy level" could give him reason to complain about age discrimination. Instead, the review should have cited examples, such as "Kevin has completed three of the five major projects late this quarter and has not contributed one new product idea in six months."

For this reason, the word "attitude" should never appear in a review. Employment lawyers and courts often see that as a code word for discrimination.

**2. Evaluation inflation.** Supervisors too often rate mediocre employees as competent; competent employees as above average; and above-average employees as superior. The problem comes when an employee is fired for poor performance yet his history of reviews tells a different story. The employee then has a supposed proof that the *real* reason for the firing was something else, maybe something illegal.

Here are the main causes of evaluation inflation. Do any sound familiar to you?

- **Misinterpreting a rating scale or instructions.** *Example:* Using a review with a 0-4 rating scale, a supervisor gives an employee a "2" in attendance and fires her. She sues, arguing that a "2" is average and acceptable, and

wins. The supervisor wrongly believed that anything less than a “4” rating was unacceptable.

- **Fear of confronting employees.** *Example:* A worker has acceptable work quality but hurts morale because of poor teamwork and pushiness. To avoid an angry confrontation, the boss rates the employee as average in soft skills.
- **Giving positive areas too much weight over negative ones.** *Example:* You rate a factory worker on quality, quantity, dependability, teamwork and safety. Quality is poor, but you rate it average because of the “glow” from the other categories, all rated above average.

**Final tip:** To determine if you inflate reviews, ask yourself the following questions: Who are my worst performers? Knowing what I know about them, would I hire them again? Do their reviews reflect their true performance?

### Case study: Liability time bombs in job reviews

Reviews should cite specific, well-documented examples of behaviors (pro and con). They shouldn't use vague terms, such as “bad attitude” or “lazy.” Here are excerpts from actual federal government employee reviews that use funny, but legally explosive, language:

- “She has delusions of adequacy.”
- “I wouldn't allow this employee to breed.”
- “He would argue with a signpost.”
- “When his IQ reaches 50, he should sell.”
- “He brings a lot of joy when he leaves the room.”
- “If he were any more stupid, he'd have to be watered.”

## **Performance review examples and tips #9**

### ***Incorporating an employee self-review***

by [\*Paul Falcone\*](#)

Drafting performance reviews is always a daunting task for supervisors, for many legitimate reasons: Judging others' work often appears exceptionally perception-driven (vs. fact-driven), and providing honest feedback is potentially confrontational. Plus, if you overinflate grades, you create a record that may not withstand legal scrutiny if you later want to terminate or discipline the employee.

In reality, it doesn't need to be that way. One simple way to reinvent performance appraisals is to shift the responsibility for initial evaluations back to your employees.

If you ask workers to grade themselves, you'll find (more than likely) that they're harder on themselves than you'd ever be! And this, more than any other exercise throughout the year, may place you and your supervisors in the roles of career mentors and coaches rather than unilateral decision-makers and disciplinarians.

**Logistics:** It's not simply about asking employees to complete a blank appraisal form. Instead, give them a separate self-evaluation form that allows them to recap their achievements, identify their shortcomings and initiate discussions regarding their future development. A basic self-evaluation form asks three core questions:

**1. "How do you feel you have performed throughout the review period?"** You could likewise ask, "Why is our company a better place for your having worked here?" or "What have you specifically accomplished in terms of increasing revenue, decreasing expenses or saving time?"

**2. "Which performance areas do you wish to develop?"** Or, "What can I, as your supervisor, do to help you in terms of providing you with increased structure, direction and feedback, to help you build your skills and strengthen your overall performance?"

**3. "What are your goals for the upcoming review period,** and what are the measurable outcomes so that you'll know that you've reached those goals?"

If you're hesitant about rolling this out because you're afraid employees will rank themselves higher than supervisors would, remember that the employee self-review form merely opens up an avenue for discussion.

If you have an employee who feels he's a stellar performer while you feel he's a laggard, this exercise will allow you to discuss the differences in your perception:

Say, "Sam, I see you graded yourself as a five out of five in the area of communication. Share with me why you feel the grade you've given yourself is warranted. Then tell me how you feel I might grade you in that area and why."

With such a simple tool in hand, you save time, allow your employees to motivate themselves and erode absolutely none of your power or control as a supervisor. And you may just find that everyone involved is empowered and invited to assume responsibility for his or her own career progression.

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Paul Falcone is an HR executive and the author of several best-selling books, including **2600 Phrases for Effective Performance Reviews**. He recently hosted an **HR Specialist** audio conference, [Hire the Best: 29 Must-Ask Interview Questions](#), which is available on CD.

## **Performance review examples and tips #10**

### ***Sample performance review***

Several employee performance software programs on the market today can make reviews less taxing and ensure that your written appraisals are consistent, comprehensive and appropriate.

*Performance Now!* by KnowledgePoint ([www.knowledgepoint.com](http://www.knowledgepoint.com)) is one example of how employee performance software can help you enhance your performance review procedures. Menu-driven and flexible, *Performance Now!* makes it easier to do employee performance rating on a variety of measures, document employee behavior, substantiate your ratings and create written appraisals that are meaningful and legally sound.

The following employee review sample was created using *Performance Now!*

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#### **National Publishing Company Performance Review**

**Employee Name:** David R. Jones  
**Job Title:** Production Assistant  
**Department:** Production  
**Date of Review:** 5/1/08  
**Date of Hire:** 3/31/07  
**Reviewer Name:** Jane Smith  
**Reviewer Title:** Production Manager

#### **PERFORMANCE ELEMENTS**

##### **Quantity**

***Needs improvement***

Dave regularly produces a normal amount of work, and he demonstrates a commitment to increasing productivity. However, it sometimes takes him longer than satisfactory to complete work and he too often misses deadlines. Dave works more slowly than the position requires and he does not always achieve his established goals.

**Quality**

***Meets job requirements***

Dave displays a strong dedication and commitment to excellence. He works hard to improve quality in his own work and promotes quality awareness throughout the organization. The work he produces meets standards for accuracy and completeness. Dave applies the feedback he receives to improve his performance and he monitors his work to meet quality standards.

**Job Knowledge**

***Exceeds job requirements***

Dave demonstrates significant expertise at his job because of his in-depth knowledge and skills. He is an exceptionally fast learner and able to quickly put new skills to use. He reads and researches extensively, staying on top of current developments that might impact his field. Dave displays a better than usual understanding of the interrelationship between his job and the jobs of others. He effectively uses the resources and tools available to him. However, he needs slightly more supervision than he should to fulfill the responsibilities of his job.

**Problem Solving**

***Meets job requirements***

Dave identifies most problem situations within appropriate time frames. His information gathering and analysis meet the requirements of his position. Most of the time, he develops several alternative solutions to problems. He usually resolves or minimizes most problems before they grow into larger issues and he participates well in group problem-solving situations.

**Communications**

***Outstanding***

Dave displays superior verbal skills, communicating clearly, concisely and in meaningful ways. He demonstrates outstanding written communications skills. He listens carefully, asks perceptive questions and quickly comprehends new or highly complex matters. Dave is extremely thorough and proactive about keeping others well informed.

**Planning & Organization**

***Needs improvement***

Dave plans ahead for additional resources. He sets measurable, realistic goals and objectives for himself. He works in an organized manner. However, Dave would be more effective if he prioritized and planned his work better. He could make more efficient use of his time through better planning and organization. Also, Dave often has difficulty integrating changes into existing plans.

**Cooperation**

***Exceeds job requirements***

Dave is consistently tactful and considerate in his relations with others. He displays an upbeat, positive outlook and pleasant manner under even the most trying circumstances. He is always the first to offer his assistance to his co-workers and he plays a highly proactive, participative role when working in group situations. Dave is particularly successful at establishing and maintaining good relationships. He takes an active role in resolving conflicts before they get out of hand.

**Dependability**

***Meets job requirements***

Dave responds promptly and reliably to requests for service and assistance. His dedication to the job often exceeds normal expectations. He is usually punctual and he makes an effort to schedule time off in advance. Dave has little difficulty following instructions and responding to management directions. In most situations, he assumes responsibility for his own actions and outcomes. He generally keeps his commitments without delay or follow-up.



**SUMMARY**

Dave has been in this position since March 31, 2007, little more than a year. During that time, he has assumed most of the essential duties of the position and only needs support on some of the more complicated aspects. His focus on quality at times interferes with his ability to meet deadlines. With increased attention to timeliness, I expect that Dave will further improve by the next review.

**PLANS FOR IMPROVEMENT**

Be wary of taking on responsibilities that aren't yours. Learn to better estimate how long tasks will take. Ask for help if competing demands become overwhelming. Prioritize demands and take them one at a time. Improve planning and organizing skills. Resist handling too many tasks simultaneously. Track precisely how you spend your time.

**Employee Acknowledgment**

I have reviewed this document and discussed the contents with my manager. My signature means I have been advised of my performance status and does not necessarily imply that I agree with the evaluation.

\_\_\_\_\_  
**Employee Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Reviewer Signature**

\_\_\_\_\_  
**Date**

